

MassDOT Project Information Portal

Office Estimates Module

Version 1.0 (October 2026)

Version History

Version	Date	Author	Summary of Changes
1.0	October 2026	Abhikant Sharma	Initial Estimates guide for External Design Lead Contacts (Project Information Portal)

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Introduction

This guide provides step-by-step instructions for **External Design Lead Contacts** to Create, Edit, Submit, Revise, Clone, and Export **Office Estimates** in ProjectInfo through the **Project Information Portal**.

Office Estimates replaces the legacy **CPE** → Excel → CPOE / **Prelims** handoff for **Migrated Projects**.

The process is:

1. Design Lead Contact drafts and submits estimates in ProjectInfo Portal
2. Project Managers review, accept, or return estimates for revision.
3. Accepted Estimates sync to Legacy (PINFO 1) / Prelims / Legacy Database

Note: You must be assigned as External Design Lead Contact on the project's Project Team. **CAPE** remains in Legacy (PINFO 1) and is not part of this Office Estimates release. Internal MassDOT roles use a separate Office Estimates User Guide.

What You Can and Cannot Do

The table below outlines the capabilities available to the **External Design Lead Contact** role in the Portal

Capability	**External Design Lead Contact**
Create / Clone Draft estimates	Yes*
Edit Draft / Revise & Resubmit sessions	Yes*
Apply Unit Prices	Yes
Submit for Approval	Yes
Export PDF / CSV	Yes
Delete Draft sessions you created	Yes (when not locked)
Review Submitted estimates (Accept / Revise)	No
Edit Received estimates	No
Finalize and Lock / Unlock	No

*Must be assigned to the Project Team for the specific project.

When Locked: Submit for Approval and Delete are hidden or unavailable until the estimate is unlocked. Active Draft sessions show **View** instead of **View/Edit**.

Accessing Office Estimates (Project Information Portal)

1. Sign in to the **Project Information Portal**.
2. Open the **Project** where you are assigned as External Design Lead Contact.
3. Go to the **Costs & Programming** tab.
4. Click the **Estimates** sub-tab.

Note: Sub-tabs appear in the order: **ESTIMATES** | **HISTORY**

The **Estimates** sub-tab displays the following sections:

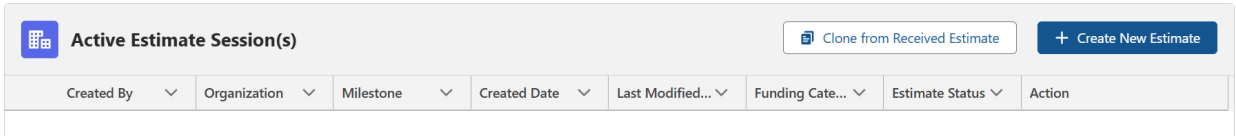
- **Submitted Office Estimate(s)**: Estimates with status Submitted or Revise & Resubmit (visible when applicable).
- **Active Estimate Session(s)**: Draft and in-progress sessions you can View/Edit, Export, or Delete.

The **History** sub-tab displaying the following section:

- **Received Office Estimate(s)**: Accepted estimates (read-only for Design Lead Contacts).

Active Estimate Sessions

Active Estimate Session(s) has the following columns **Created By**, **Created Date**, **Last Modified Date**, **Milestone**, **Funding Category(s)**, and **Action**.



Active Estimate Sessions

From here, the following actions are available:

- **+ Create New Estimate** to start a new Draft Session.
- **Clone from Received Estimate** to copy a prior Received estimate to make creation more efficient.
- **View/Edit** on a Draft row to continue editing an existing Estimate.
- **Export** to download PDF or CSV version of the Estimate.
- **Delete** icon (trash) to delete any Draft sessions created.

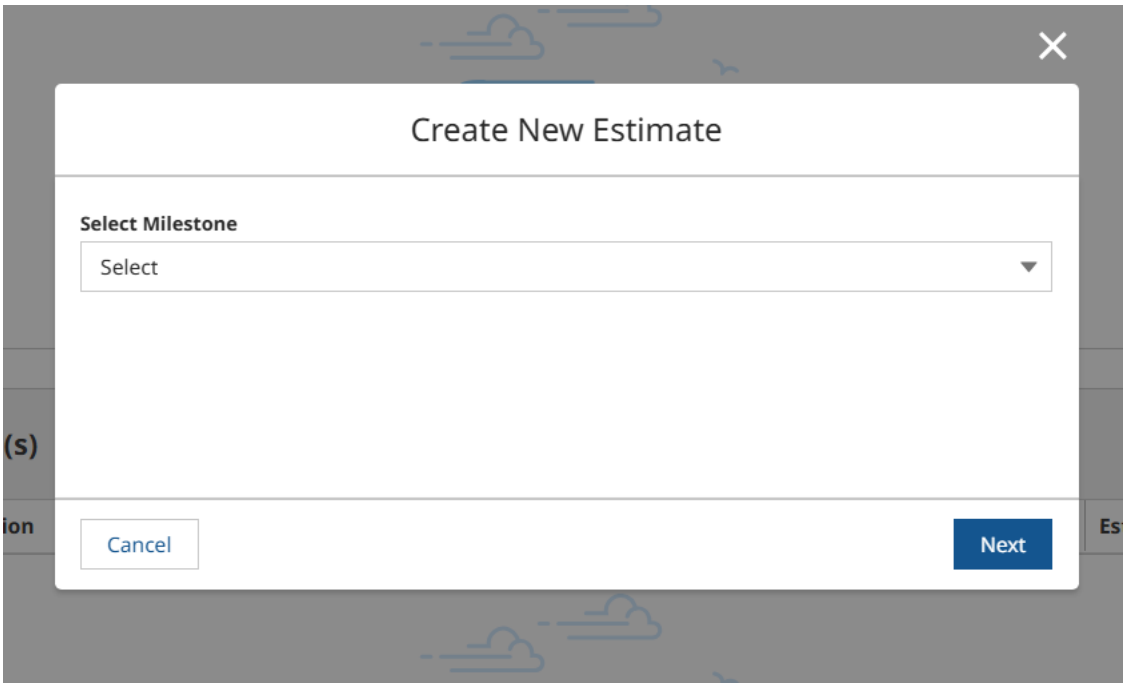
Creating a New Office Estimate

Click **+ Create New Estimate**. A multi-step screen opens with chevron navigation:

Milestone → Funding Categories → Bid Items → Review

Step 1: Milestone

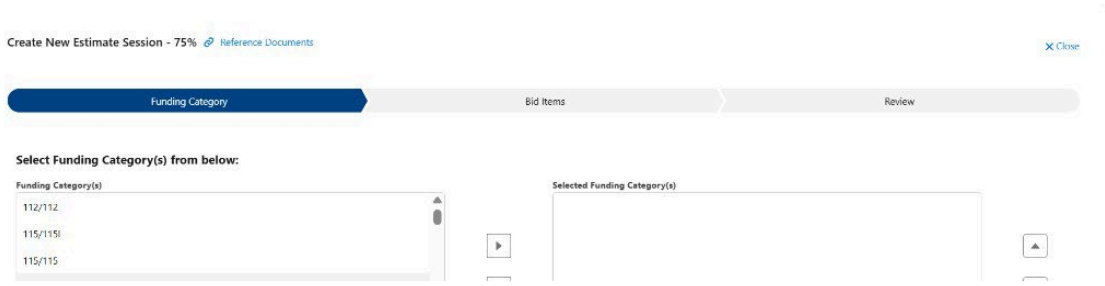
- Select the **Milestone** associated with this estimate session (required).
- Click **Next**.



Milestone selection on Create New Estimate

Step 2: Funding Categories

- Select one or more **Funding Category(s).** The values are displayed in the format **Funding Category / Sub-Category**.
- Funding Categories are maintained centrally in ProjectInfo and synced from the Legacy Database.
- Click **Next**.



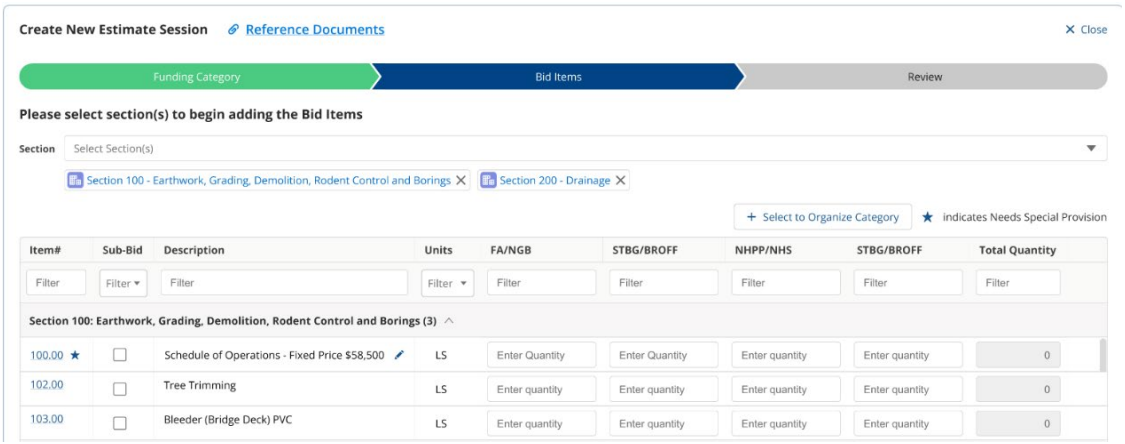
Funding Categories chevron on Create New Estimate

Step 3: Bid Items

- Add Bid Items by section using filters, search, and selection controls.
- Enter **Total Quantity** per Funding Category for each Bid Item.

- Optionally, click the pencil icon next to **Description** to enter an Additional Description.

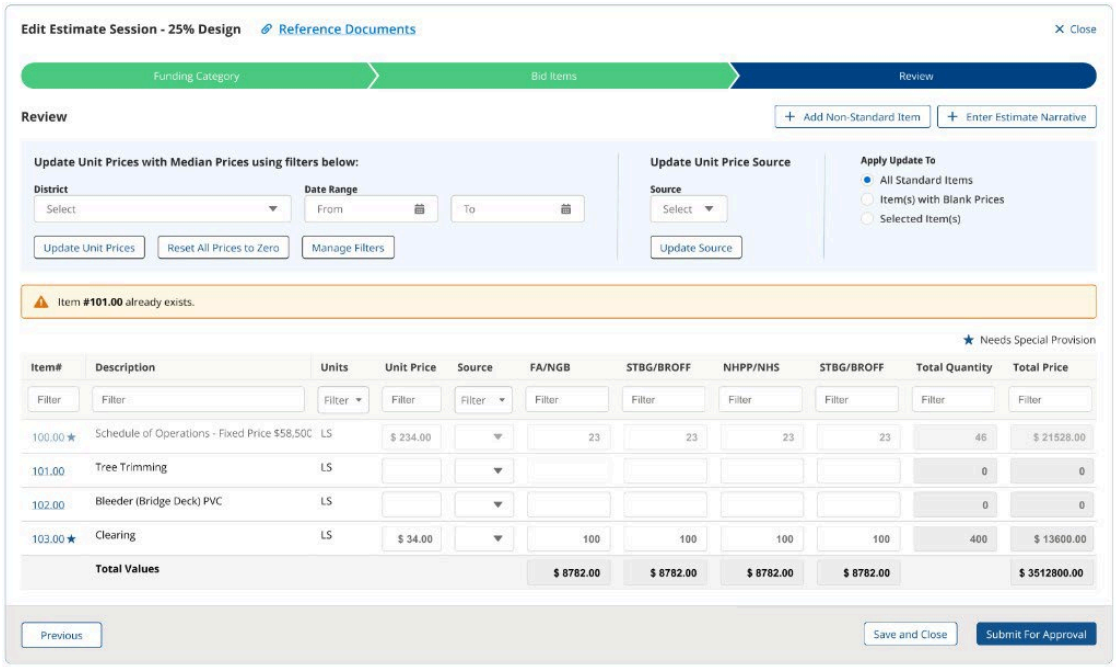
  Note: The Additional Description appends to the existing description; it does not overwrite it.
- Apply **Unit Prices** from historical WABA data (see Applying Unit Prices).
- Click **Next**.



Add Bid Items

Step 4: Review

- Review all Bid Items, quantities, Unit Prices, Sources, and Total Price.
- Add **Non-Standard Bid Items** if needed.
- Resolve any validation banners before proceeding.
- Click **Save and Close** to save as Draft, or **Submit for Approval** when ready.



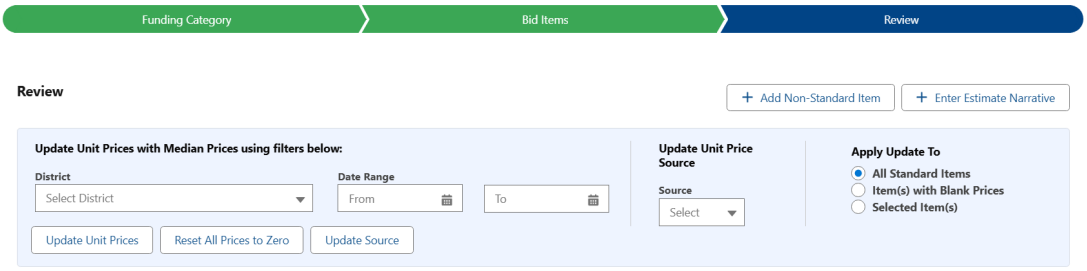
Review chevron on Create New Estimate

Note: Use **Previous** to return to an earlier chevron; progress is saved. Use **X Close** to exit and return to the Estimates sub-tab.

Applying Unit Prices

On the **Bid Items** chevron, use **Apply Unit Price** to pull calculated prices from historical WABA data migrated and synced from the Legacy Database.

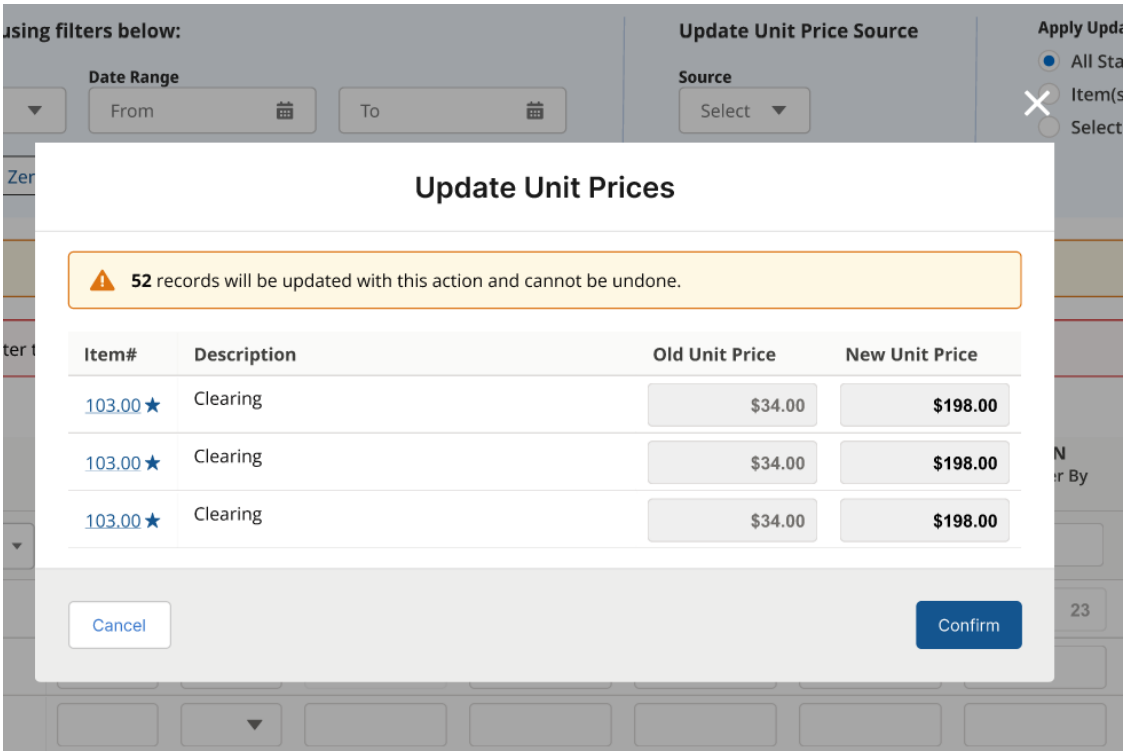
- **District** and **Date Range** filters are used when calculating prices (provide both when required).
- **Source** displays the price origin (for example WABA, BUE, ICE, EJ, Other).
- Compare and select Unit Prices in-session without leaving ProjectInfo.



Applying Unit Prices

A summary of the Unit Price updates is displayed for review and confirmation. It includes the total number of records to be updated, along with the Old and New Unit Prices.

Note: This action cannot be undone.



Unit Price Comparison

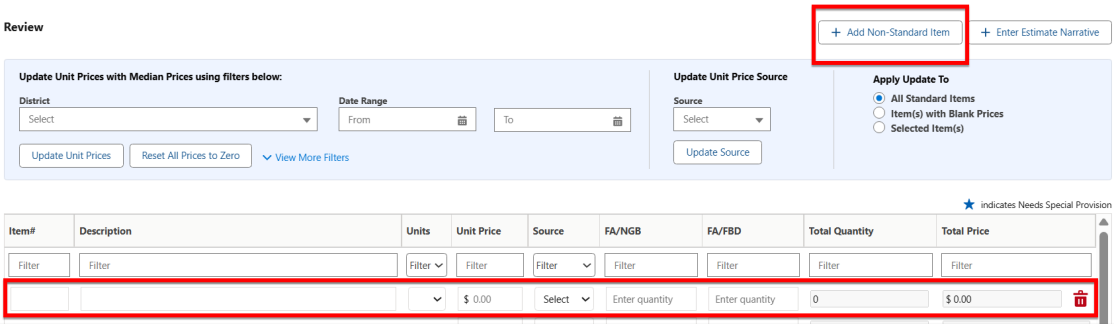
Adding Non-Standard Bid Items and Validations

On the **Review** chevron, click **Add Non-Standard Bid Item** when an item is not on the Bid Items master list.

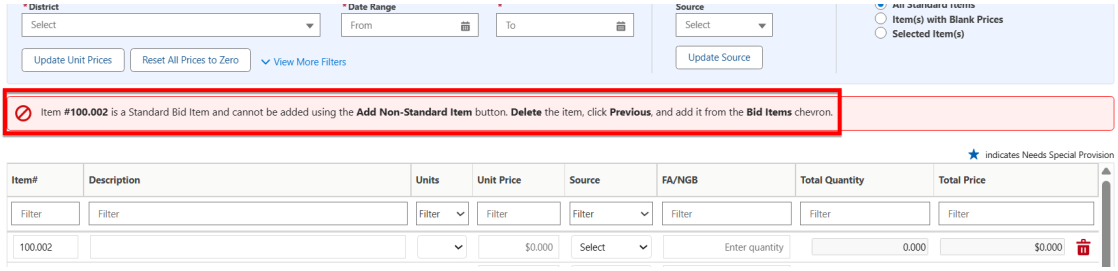
The following validation checks must be satisfied before proceeding on checks must be passed:

Validation	Rule
Duplicate Item #	Blocked on the Review list
Non-Standard Item #	Cannot start with *999*. (Allowance numbers)
Standard Item via Non-Standard	Standard Bid Item # must be added from the Bid Items step, not Add Non-Standard
Lump Sum (LS)	Total Quantity must equal 1
Funding Category quantity	Each selected Funding Category must have Total Quantity greater than 0

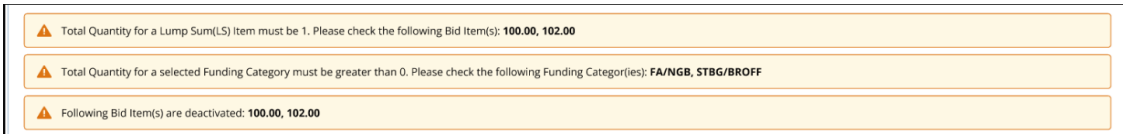
Validation	Rule
Deactivated masters	Deactivated Bid Items or Funding Categories are flagged on Submit



Add Non-Standard Bid Item



Non-Standard Item Validation

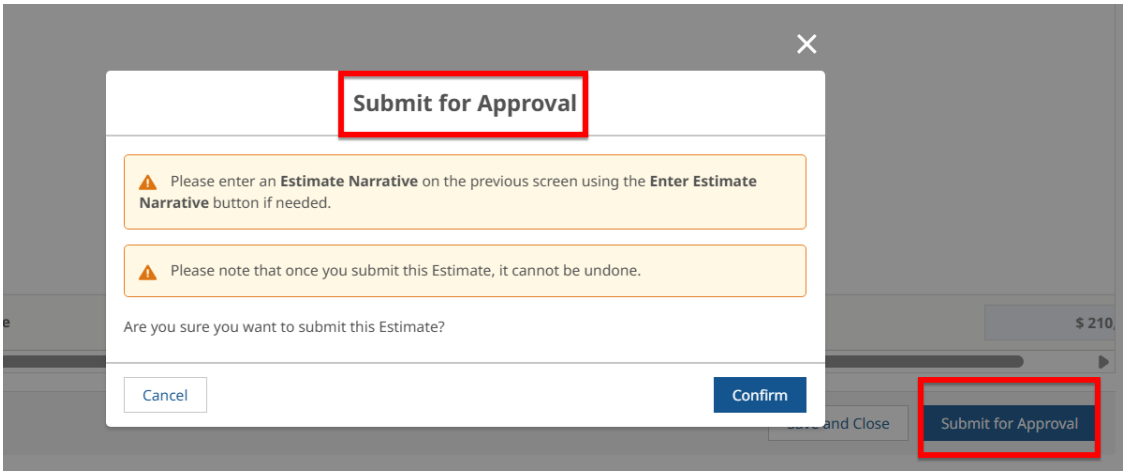


Review Validations

Submitting for Approval

When the estimate is complete and validations pass:

1. On the **Review** chevron, click **Submit for Approval**.
2. Enter or confirm the **Estimate Narrative** (required).
3. Confirm in the **Submit for Approval** dialogue.
4. The estimate moves to **Submitted Office Estimate(s)**.
5. The Project Manager receives an automatic **Bell Notification** and email.



Submit for Approval



Estimate Narrative

Revising and Resubmitting

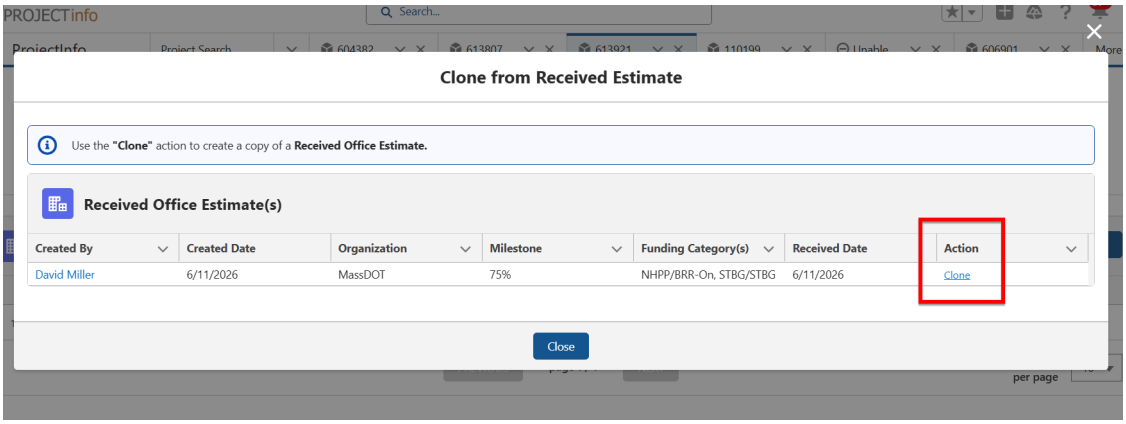
When a Project Manager sends an estimate back:

1. The estimate appears under **Active Estimate Session(s)** with status **Revise & Resubmit**.
2. Click **View/Edit** to open the screen.
3. Review **General Comments** from the Project Manager.
4. Make required changes and click **Submit for Approval** again.

Cloning from a Received Estimate

After at least one Office Estimate has been Accepted (Received), you can start a new Draft by cloning instead of building from scratch:

1. On the **Estimates** sub-tab, click **Clone from Received Estimate**.
2. Select the **Received Office Estimate** to clone.
3. A new Draft session is created with Bid Items, Funding Categories, quantities, and pricing copied from the source.
4. Edit as needed and submit when ready.



Clone from Received Estimate

Deleting a Draft Estimate Session

You may delete a **Draft** session you created from **Active Estimate Session(s)**:

1. Hover over the **Delete** icon which has the tooltip: *"Delete Estimate Session"*.
2. Click the icon. A confirmation dialogue appears with a warning that deletion cannot be undone.
3. Click **Confirm** to delete, or **Cancel** to keep the session.
4. On success: *"Estimate Session deleted successfully."* is displayed.

Note: The Delete icon is hidden when the Office Estimate is locked for the project.

Exporting Estimates

Use **Export** from Active, Submitted, or Received sections to download the estimate as **PDF** or **CSV** when available on the row actions.

Validations Reference

The system enforces validations at **Submit**. Failed validations display **red banners** and block the action.

Trigger	Validation	Message (summary)
Submit	Deactivated Funding Category on estimate	*Please remove the following Funding Categor(ies) from the Funding Category Chevron as they have been deactivated: <values>.*
Submit	Deactivated Bid Item on estimate	*Following Bid Item(s) are deactivated: <Item #s>*
Review (Submit)	Duplicate Item #	Blocked on Review list

Trigger	Validation	Message (summary)
Review (Submit)	Non-Standard Item # starts with *999*.	Blocked
Review (Submit)	Standard Item added via Non-Standard	Blocked — add from Bid Items step
Review (Submit)	Lump Sum (LS) quantity	Total Quantity must equal 1
Review (Submit)	Funding Category quantity	Total Quantity must be greater than 0 for each selected category

Notifications Summary

Notifications are sent out based on triggers to specified recipients as summarized below

Trigger	Recipients	Channel
External Design Lead Contact submits estimate	Project Manager, Alternate PM, Design-Build PM	Bell Notification and email
Project Manager sends to Revise/Resubmit	External Design Lead Contact	Bell Notification and email
Project Manager Accepts estimate	Relevant stakeholders (per project configuration)	Bell Notification and email

Key Terms Used in Guide

Term	Definition
Project Information Portal	External access path for External Design Lead Contacts to ProjectInfo.
Active Estimate Session	A Draft or in-progress estimate not yet Submitted or Received.
Submitted Office Estimate	An estimate submitted by a Design Lead Contact awaiting Project Manager review.
Received Office Estimate	An estimate Accepted by the Project Manager; syncs to Legacy (PINFO 1) / Prelims / Legacy Database.
Revise & Resubmit	Status when PM returns an estimate to the Design Lead Contact for correction.
Milestone	Schedule milestone associated with the estimate session.
Funding Category / Sub-Category	Cost allocation dimension configured in ProjectInfo and synced from Legacy Database.
Bid Item	Standard construction pay item from the Bid Items master

Term	Definition
	list.
Non-Standard Bid Item	Custom item added on Review when not on the master list.
Unit Price / Source	Price applied from historical data; Source indicates origin (WABA, BUE, ICE, EJ, Other).
Estimate Narrative	Required text entered at Submit describing the estimate.
WABA	Weighted Average Bid Analysis historical pricing data synced from Legacy Database.