NAPT USER GUIDE

VERSION 4.0

LAST MODIFIED: DECEMBER 2022

For Additional Support

Occam Industries proudly developed this Network Access Planning Tool for Metrolinx.

If you need additional technical support, or if you have any feedback or suggestions on how we can improve the application, please send an email to NAPT.Training@metrolinx.com.

.

Contents

Introduction

Welcome to the Metrolinx Network Access Planning Tool (NAPT) user guide.

This guide provides step-by-step instructions for submitting and reviewing work event requests and work group requests within NAPT.

You will see this icon throughout this document. It indicates important information, additional insight, or a tip to improve workflow.

What is NAPT?

NAPT is the system Metrolinx has adopted to manage all requests for access to the Metrolinx rail network for construction, maintenance, and other activities related to working on GO Rail Corridors.

Key Features

NAPT offers the following key features to make your daily workflows easier and more effective:

- ✓ One central location for all access requests and associated plans
- ✓ Visibility of all process flows and request statuses
- ✓ Standardization of forms and version control
- ✓ Automated record keeping and log tracking

Who uses it...	And why?
Contractors and external third parties	To submit requests for access to rail corridors along with associated work plans and information
Metrolinx Project Delivery Teams (PDTs)	To track contractor access and facilitate accurate and complete requests for access
Metrolinx Rail Corridor Access and Control (RCAC)	To review and approve (or deny) access requests, assign flagging, and ensure the safety of the rail corridors

Roles in NAPT (NEW)

All users in NAPT have an assigned role which determines what they can do in the application. It's important to understand the role you've been assigned so you know the tasks you can perform.

Role	Description
Project Dev	A project dev is a project delivery team member that is a Metrolinx employee, with similar permissions in the system to a contractor. A project dev can update project information and the status of work plans.
RCAC	The RCAC planner is a first-level administrator, who can adjust project rules; create, approve, edit, and submit work events for all events; and submit flagging event. Deadlines do not apply to the work an RCAC planner does. An RCAC planner typically handles exception cases.
USRC	The USRC planner is equivalent to an RCAC planner, and usually has their own team.
Long Term Planner	A long term planner has the same permissions as an RCAC but can also edit and approve Disruptive Access Request Periods. They can also create calendar items.
Admin	An NAPT admin can do everything other users can do but can also create and manage users. Project rules do not apply to admin-level users. Note that this is not the same as a project administrator.

NOTE: Some NAPT functions are not available for all users; the permissions needed to access tasks is noted below each section.

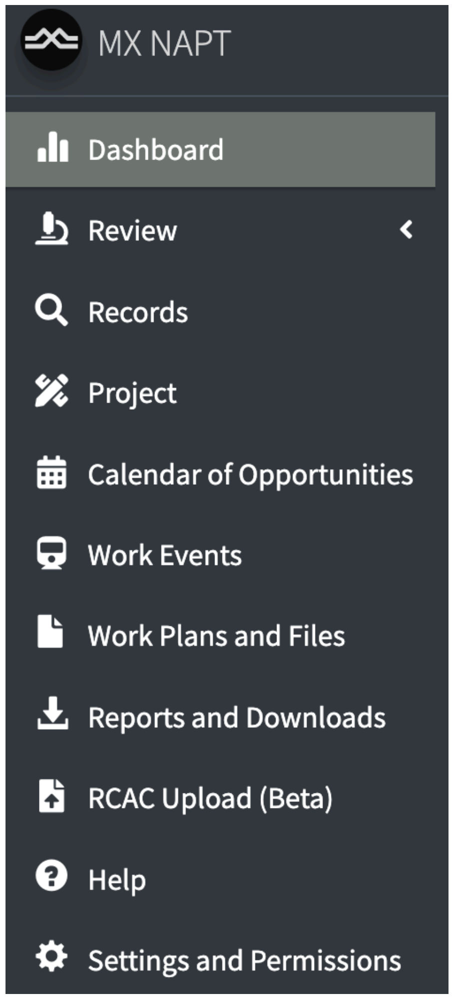
System Time

The time in NAPT is +4 hours from Toronto Eastern time.

Navigating in NAPT

Main Menu

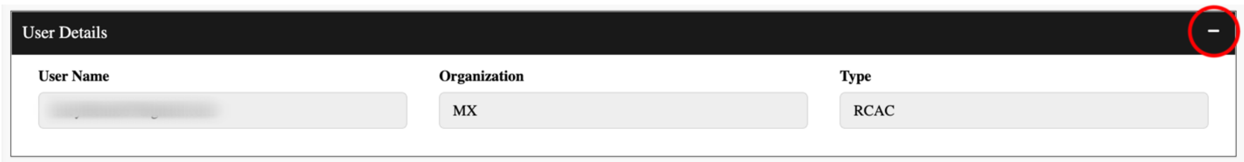
Your main menu is on the left-hand side of the application. Use it to access the screens described below. Certain screens and tasks may not be applicable to all roles.



Hiding and Expanding Sections (NEW)

As you navigate through Metrolinx, you'll see various boxes that contain related information, and you can hide or expand these sections using the plus (+) or minus (-) button on each section.

To hide a section of the screen, click the minus (-) button on the right side of that section. The section closes.



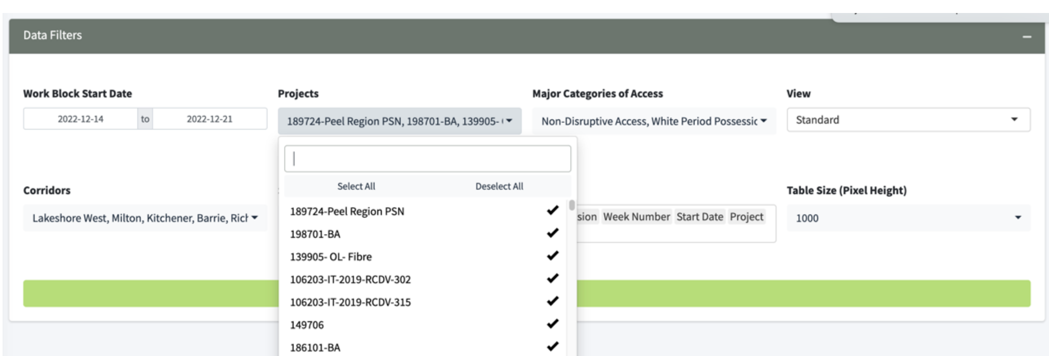
To expand a hidden section, click the plus (+) button on the right side of that section. The hidden section expands.

Filtering Information (NEW)

Throughout the application, you'll see areas where you can use filters to find information. For example, on your dashboard, you can use the Data Filters section to filter by project (if applicable), major categories of access, start date, corridor, and request status. This helps you focus the dashboard information to only what you want to see.

To use filters (on the Work Event Report in this example):

1. Click in the field you want to use to filter. A drop-down list appears with the filtering options for that field.



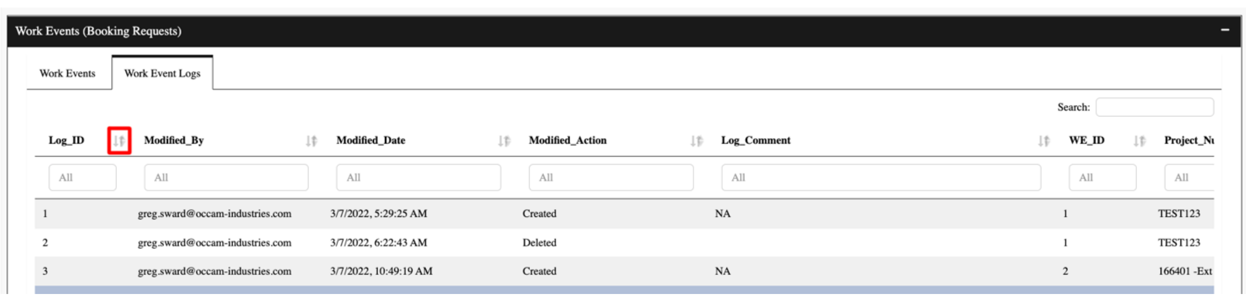
2. You can either:
   - Find the filter phrase you want in the drop-down list and click on it.

   OR

   - Begin typing the filter phrase. As you type, the list will change to only include entries that match what you've typed. When you see the entry you want, click on it.
3. Delete the All entry from the field if it's there.
4. As you add selections for filters, the information displayed below is reduced to only entries that match the filter selections.

Sorting Information (NEW)

Like filtering, throughout the application, you can sort lists of information. You'll see two arrows on each column header. Click the column header once to sort in ascending order and click again to sort in descending order.



Downloading Information (NEW)

Throughout the application, you'll see links that allow you to download information in spreadsheets. You can click on each link and the file will be downloaded to your computer.

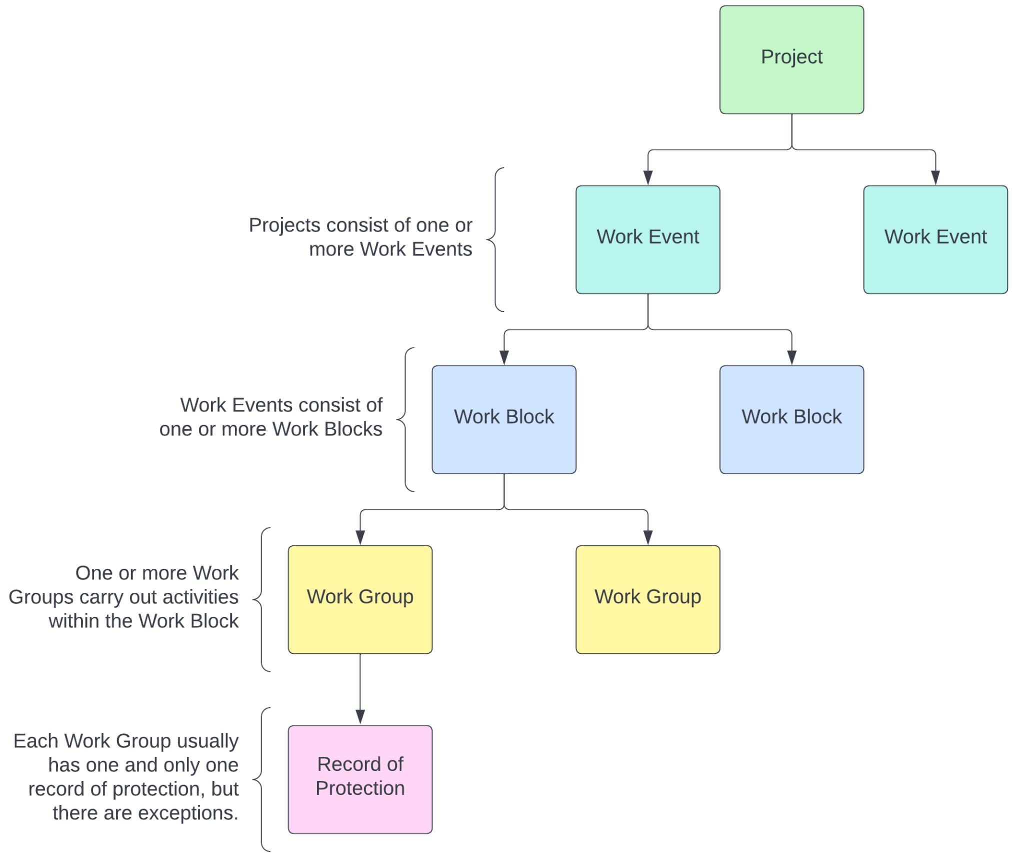
Access Request Workflow

PERMISSION NEEDED: All users.

In NAPT, users request access by submitting a Work Event Request. Each request is associated with a new or existing work event.

- A work event is the entire scope of work that includes associated work blocks, work groups, and plans.
- A work block defines any work being done for a continuous period. For example, working from 0900 to 1700 on Monday and Tuesday would be two work blocks, while working from Friday 2200 to Monday 0400 would be one work block.
- A work group defines separate groups of people and associated machinery working during each individual work block.
- A work plan describes the activities and work methods to be executed by the work groups.
- A *contingency plan* describes how specific risk elements are being managed and are often included as part of a work plan..

There can be multiple work blocks, work groups, and work plans associated with one work event.



If a contractor wants to perform work on the rail corridor, they must submit a Work Event Request associated with a specific project to request access and receive acceptance from Metrolinx.

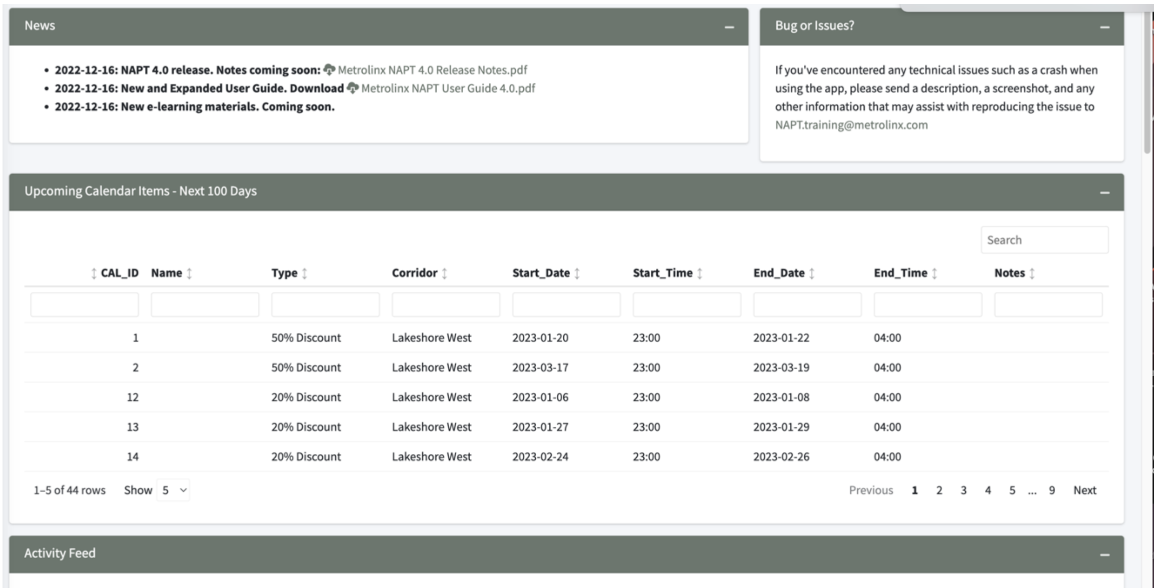
The Metrolinx Project Delivery Team (PDT) then reviews the contractor's request.

- If all required information is complete and the request aligns with project goals, the RCAC will review and respond to the request.
- If there is information missing, the PDT follows up with the contractor until the PDT considers the request ready to submit.
- If accepted, RCAC will assign protection to the work groups as needed.

Using the Dashboard (NEW)

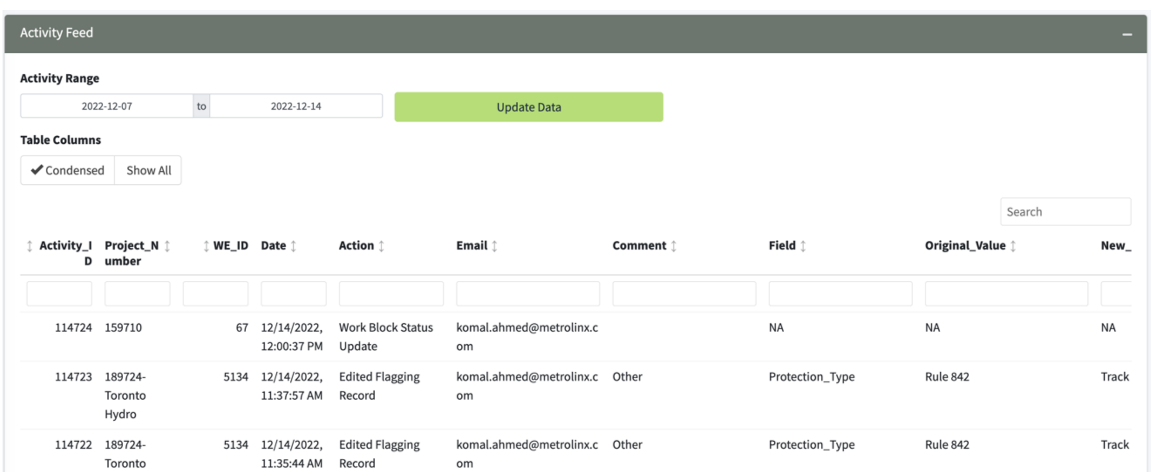
PERMISSION NEEDED: All users.

The Dashboard page is your default homepage. Use it to get a convenient overview of upcoming calendar events, and news items, as well as your activity feed.



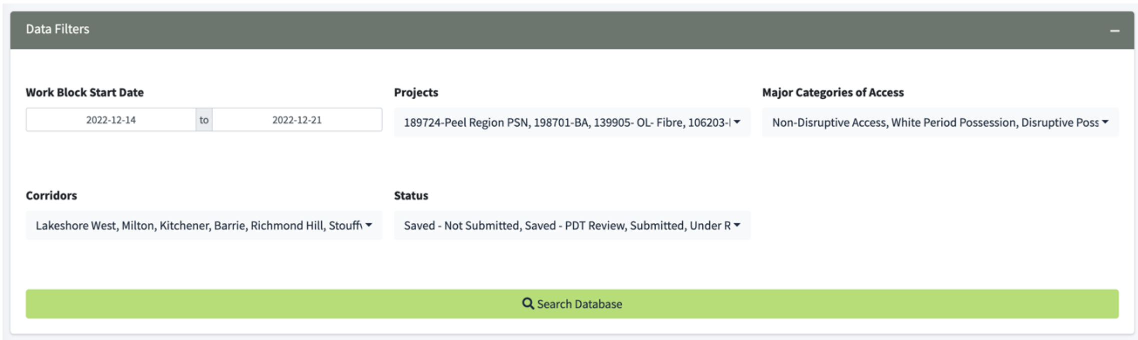
Viewing Your Activity Feed

Your activity feed shows information about the latest activity for any projects that you're assigned to.

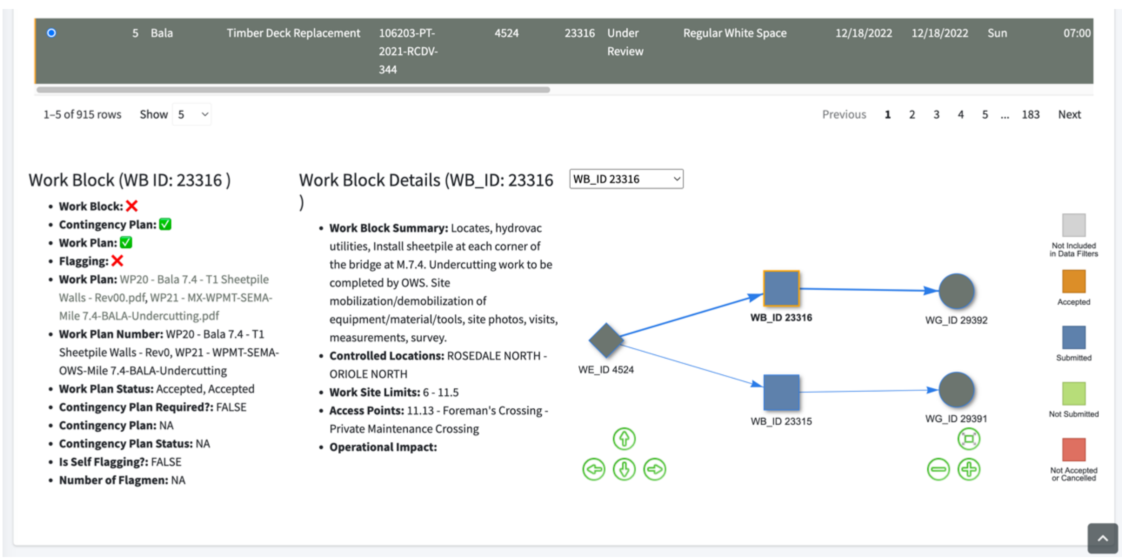


Working with a Work Block Summary (NEW)

In the Review tab, click on the Work Block Summary tab to select it. Specify your query parameters using the inputs at the top of the screen and click 'Search Database'.



The buttons at the top of the Work Blocks section allow you to act on the selected Work Block, and below the Work Block list, you'll see the details for the selected Work Block.



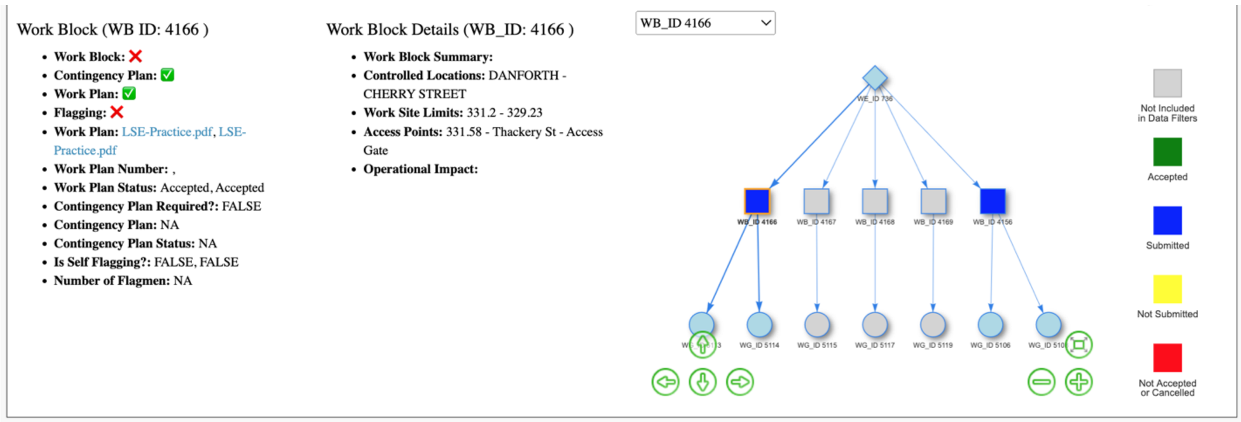
The buttons for the Work Block are:

- Go to Work Event: Click this to open the Work Event page for the selected work block.
- Download: Click to download a Microsoft® Excel® spreadsheet that contains the Work Block information.
- Refresh Table Filters: Click to refresh the filters on the table.

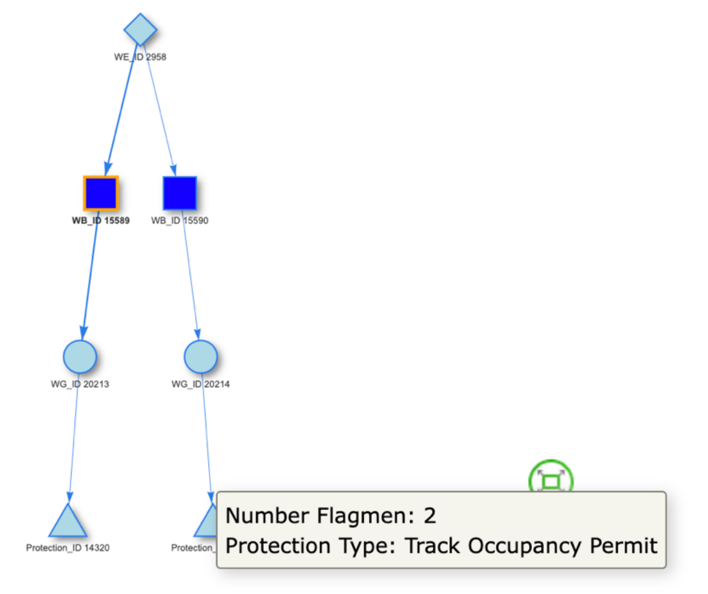
- Edit Work Block: Click to edit the selected work block. See Edit a Work Block for more information.
- Update WB Status: Click to update the work block status.
- Assign Protection: Click to assign protection
- Edit Protection: Click to edit protection.
- Update Planning Info: Click to update the planning information.

Using the Work Block Details

The Work Block details are shown below the list of work blocks and contain information about the selected work block as well as a diagram of the work event. The legend on the right side shows colors with corresponding statuses.

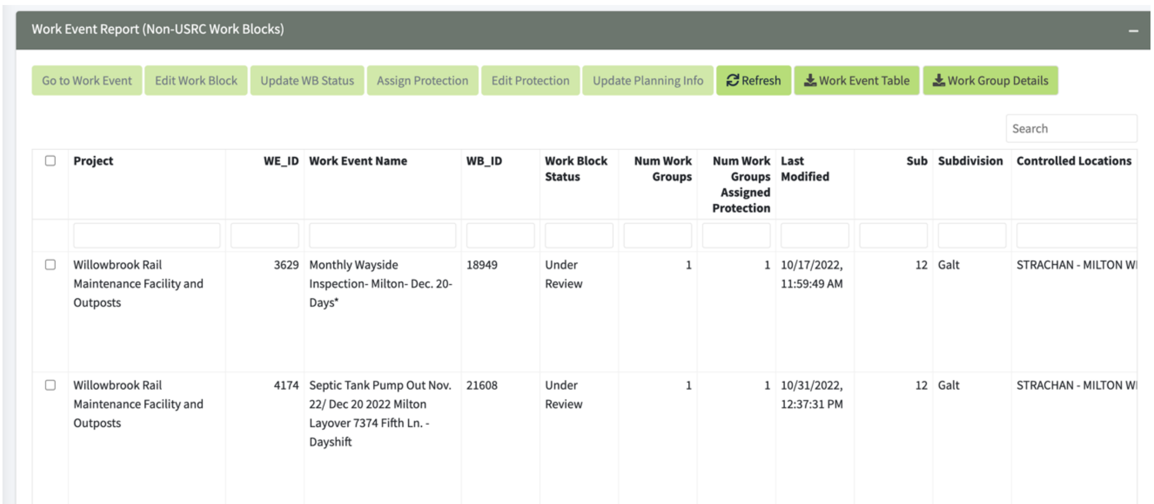


- To select a work block in the diagram, click the drop-down list and select the work block ID or click on the work block in the diagram.
- To zoom in or out from the diagram, click the plus (+) or minus (-) buttons or use the mouse scroll.
- To move the diagram, click the arrow buttons or click and drag with the mouse cursor.
- To see more information about a selected work block, hover over or click on a block.
- To see more information about a selected work group, hover over or click on a circle.
- To see flagging details, hover over or click on a triangle.


WE_ID 2958
WB_ID 15589
WB_ID 15590
WG_ID 20213
WG_ID 20214
Protection_ID 14320
Number Flagmen: 2
Protection Type: Track Occupancy Permit

Working with a Work Event Report

In the Review tab, click on a Work Event Report to select it. Specify your query using the input parameters and click 'Search Database'.



The buttons for the Work Events are:

- Go to Work Event: Click this to open the Work Event page for the selected work event.
- Edit Work Block: Click to edit the selected work block. See Edit a Work Block for more information.
- Update WB Status:
- Assign Protection:
- Edit Protection:
- Update Planning Info:
- Refresh:

At the bottom of the Work Event, there are links for you to click to download the Work Event Table or the Work Event Details.

Before You Create a Work Event Request

Before you create a work event request, you must:

- Ensure you have access to the correct projects.
- Review the project information and project task numbers.
- Confirm that the access gates are listed in the access gates table.
- Upload work plans.
- Create Disruptive Possession Requests if needed.

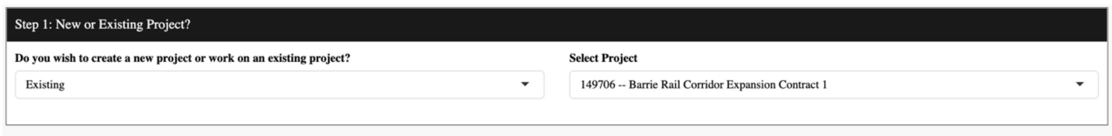
Viewing Project Information (NEW)

PERMISSION NEEDED: All users.

All contractors and external third parties should be associated with a project. Only Metrolinx users can create, modify, or delete project information on the Project page.

To view project information:

1. Click Project in the main menu. The Project page appears.

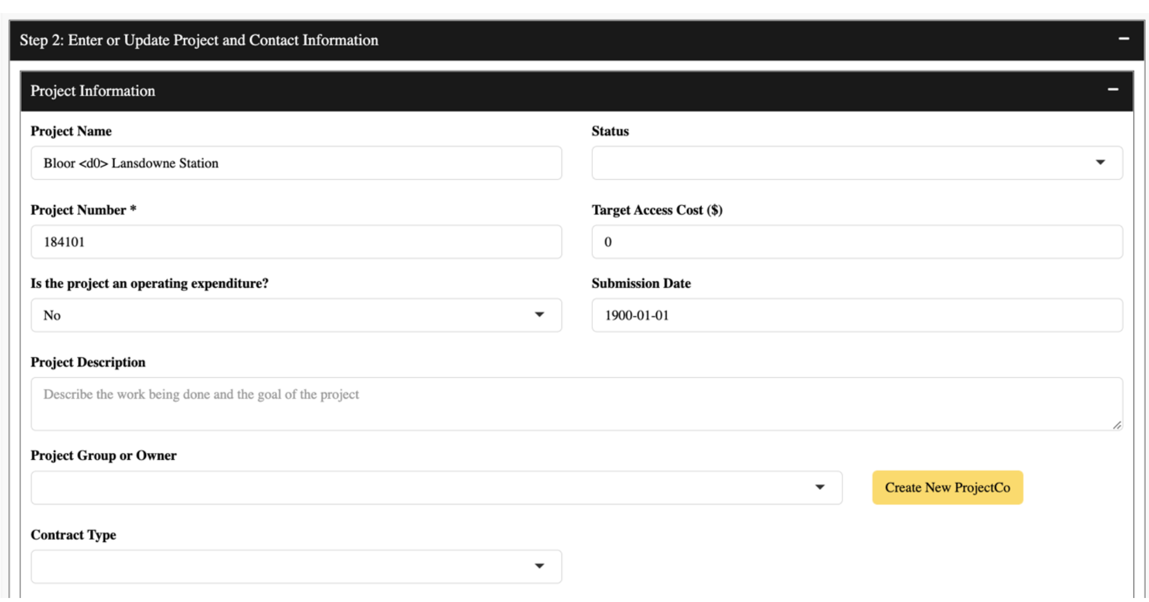


2. In the Step 1: New or Existing Project? Block, the field for whether you are creating a new project or want to work on an existing project will be set to Existing.
3. Select the project you want to review in the Select Project drop-down list. Review the information about the project in the other sections on the page.

Project Step 2

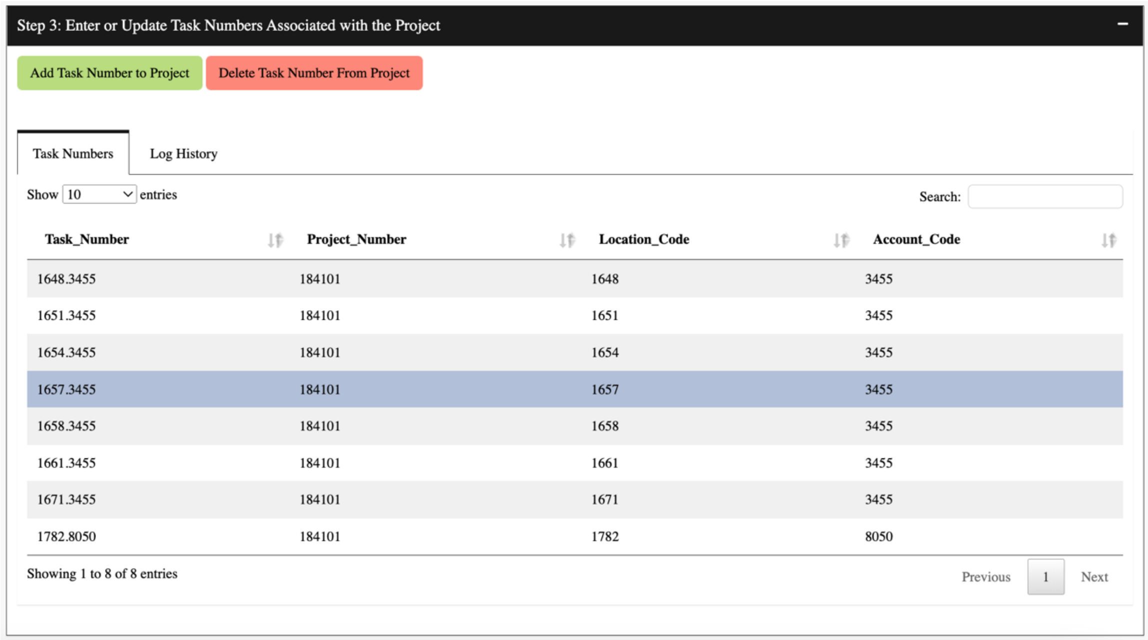
In the Step 2: Enter or Update Project and Contact Information, you'll see the following information:

- Project Information
- Metrolinx Contact Information
- Contractor Contact Information



Project Step 3

In the Step 3: Enter or Update Task Numbers Associated with the Project section, you can review or update the task numbers associated with your project.


Step 3: Enter or Update Task Numbers Associated with the Project

Add Task Number to Project | Delete Task Number From Project

Task Numbers | Log History

Show 10 entries Search:

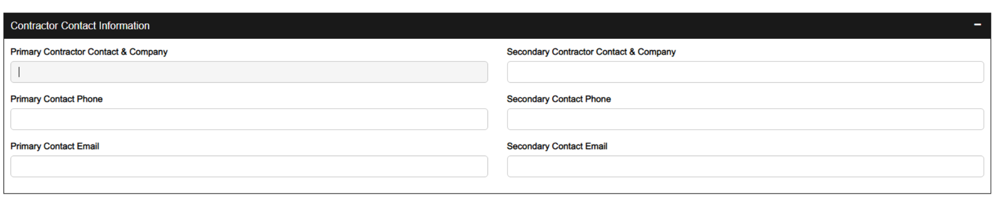
Task_Number	Project_Number	Location_Code	Account_Code
1648.3455	184101	1648	3455
1651.3455	184101	1651	3455
1654.3455	184101	1654	3455
1657.3455	184101	1657	3455
1658.3455	184101	1658	3455
1661.3455	184101	1661	3455
1671.3455	184101	1671	3455
1782.8050	184101	1782	8050

Showing 1 to 8 of 8 entries Previous 1 Next

The Project page includes fields containing contractor contact information.

It is the contractor's responsibility to review this information and ensure these fields are up to date.

If the contractor finds that any fields in the Project page are incorrect or require updating, the contractor must contact the Metrolinx PDT to correct or update the information.



Work Event Requests

PERMISSION NEEDED: All users.

Creating a Work Event Request

Before creating a new work event, do a quick check:

- ✓ Have there been any changes, or do there need to be any changes, to the Contractor Contact Information on the Project page? If so, update the information first.

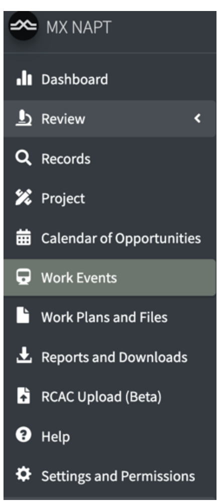
Step 1: Creating a work event record

To create a new work event request, you must first submit a work event record to Metrolinx RCAC. This work event record will apply to all work blocks and work groups in the work event.

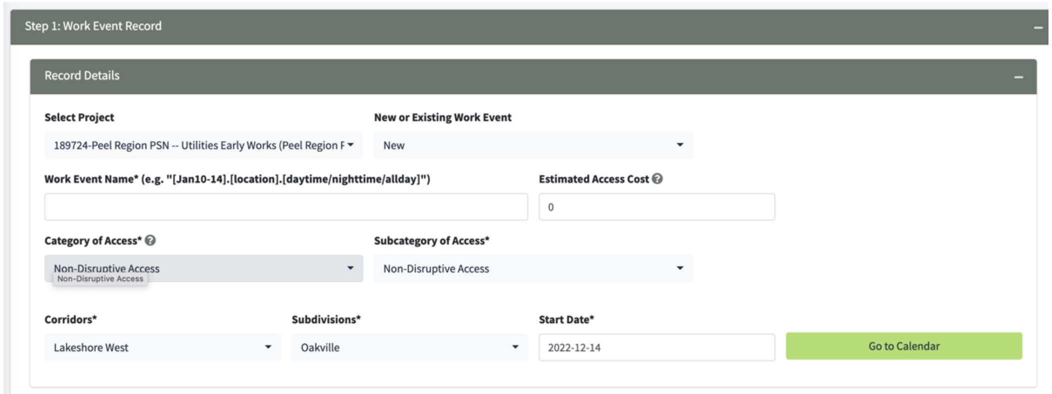
The work event record gives Metrolinx an understanding of the type of work you are proposing and any associated risks or special requirements. Consequently, once you have submitted the record, you cannot change it (although you can edit associated work blocks and work groups) in accordance with the most current T- minus process deadlines.

To submit a work event record:

1. From the main menu, click Work Events.



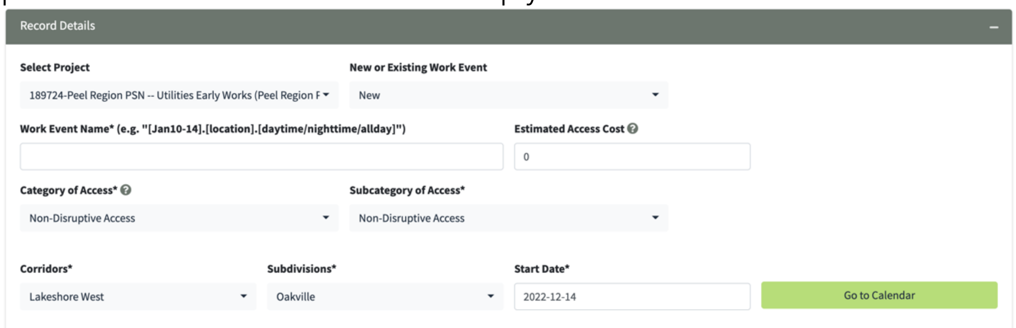
The Work Event Record page appears.



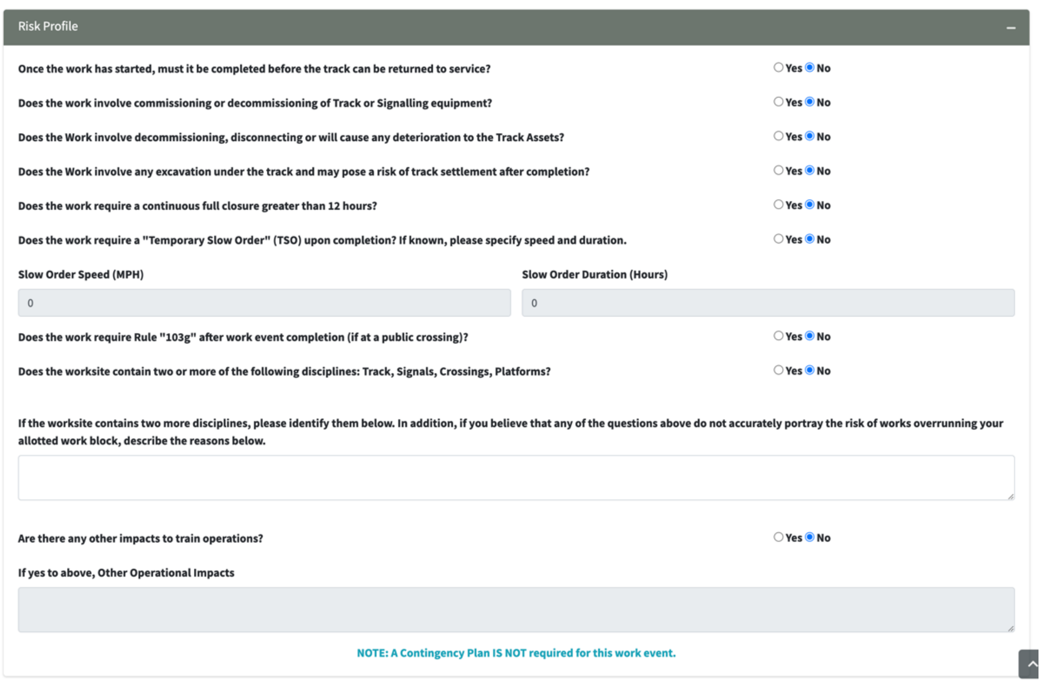
2. Complete the following fields in the Record Details block:
    - Select Project: Select the project that will be associated with the work event from the drop-down list.
    - New or Existing Work Event: Ensure New is selected.
    - Work Event Name: Add a work event name that summarizes the work in a few words (for example, Light Platform Repair).
    - Estimated Access Cost: Enter a value. This cost applies to the entire work event and only applies to projects with a Commercial Regime. Leave this blank if it does not apply to your project.
    - Category of Access: Select from the drop-down list. The options are Non-Disruptive Access, White Period Possession, and Disruptive Possession. If you choose Disruptive Possession, the Disruptive Possession Period field appears.
    - Subcategory of Access: Select from the drop-down list.
    - Disruptive Possession Period: This field is only visible if you've selected Disruptive Possession in the Category of Access field. If you're creating a Work Event Request with Disruptive Possession, be sure to check the Calendar of Opportunities before you begin creating the Work Event Request. See Using the Calendar of Opportunities for more information.
    - Corridors: Select from the drop-down list.
    - Subdivisions: Select from the drop-down list.
    - Start Date: Click in the field and choose the date when the work to be performed starts from the calendar that appears.
        - For more information about existing scheduled closures and blackout dates, click the Go to Calendar button.

- After you have reviewed the calendar, click Work Events in the menu to return to your work event booking request.

Many fields have a (?) icon that you can click for more information about how to complete the field.
For example, if you click the (?) icon in the *Estimated Access Cost* field, it provides a link to Access Prices to help you estimate cost.



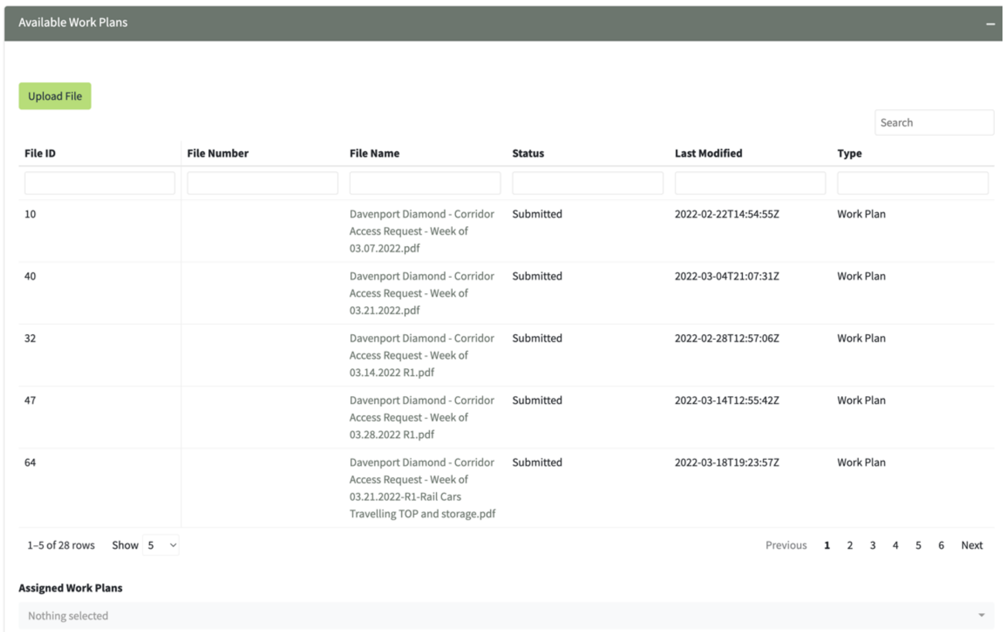
3. Scroll down to the Risk Profile block.



4. Answer Yes or No to each risk assessment question and complete any free text fields that may apply.

- **If you answer yes to any of the questions, an alert in red will appear stating, "NOTE: A Contingency Plan IS required for this work event." You will have the opportunity to assign a contingency plan once you have submitted the request. Contingency plans are often included as part of a Work Plan. If this is the case, then there is no need to upload a separate contingency plan.**

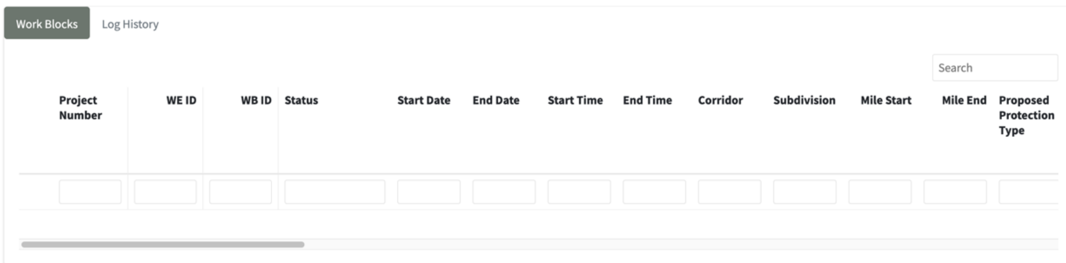
5. Scroll to the Available Work Plans section.



6. Navigate to the location of the file you want to upload and click on the file to select it.
7. Click the Open button on the file explorer window. The file name appears in the Select File field on the Add New File dialog box.
8. Click the Upload button to add the new work plan.
9. Click the Create New Work Event Record button. A Work Event Record is created and the Step 1: Work Event Booking Request section will update to select your new work event as an existing event.

Step 2: Adding work blocks and work groups

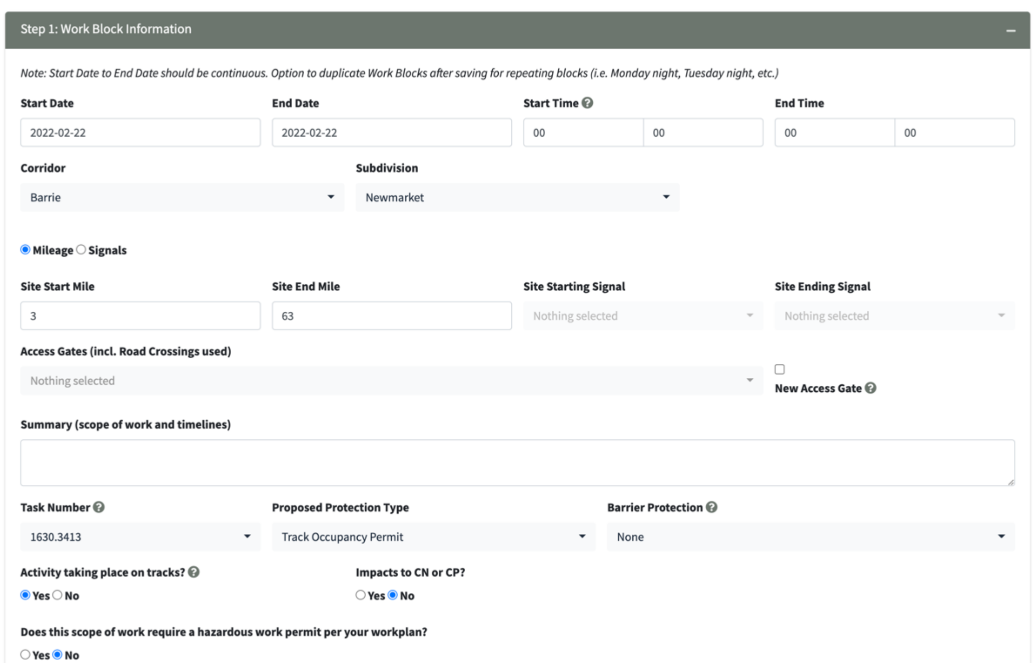
Once you have created your work record, you can add your work blocks and work groups.



Add a Work Block

To add a work block:

1. On the Work Events page, select your project and existing work event. Note that if you just created your work event booking request, this happens automatically.
2. Scroll down to the Step 2: Work Blocks and Work Groups section.
3. Click the New button in the Work Block area. The New Work Block dialog box appears.



4. Complete the fields in the Step 1: Work Block Information section as follows:

- Start Date:
- End Date:
- Start Time:
- End Time:

- Corridor:
- Subdivision:
- Limits specified by Mileage or Signals:
- Site Start Mile:
- Site End Mile:
- Start Signal
- End Signal
- Access Gates:
- Summary:
- Task Number:
- Proposed Protection Type:
- Barrier Protection:
- Activity Taking Place on Track:
- Impacts to CN or CP:
- Does this scope of work require a hazardous work permit per your workplan?:
- Site Supervisor Name
- Site Supervisor Phone
- Site Supervisor Email
- Is this request being submitted late?
- Late Request Justification

5. Complete the fields in the Step 2: Track Segments section.
   - Click the Select All Tracks button to check all boxes for the track segments.
   - Click the Clear All Track button to uncheck all boxes for the track segments.
   - Check or uncheck boxes as needed for track segments.
6. In Step 3: Assign Contingency Plan:
   - If there is no contingency plan needed, skip to the next step.
   - If a contingency plan is required, you can include it as part of the work plan.
7. Click the Save button on the New Work Block dialog box.

NOTE: A user may specify their limits using mileage OR signals, but not both. If using signals:

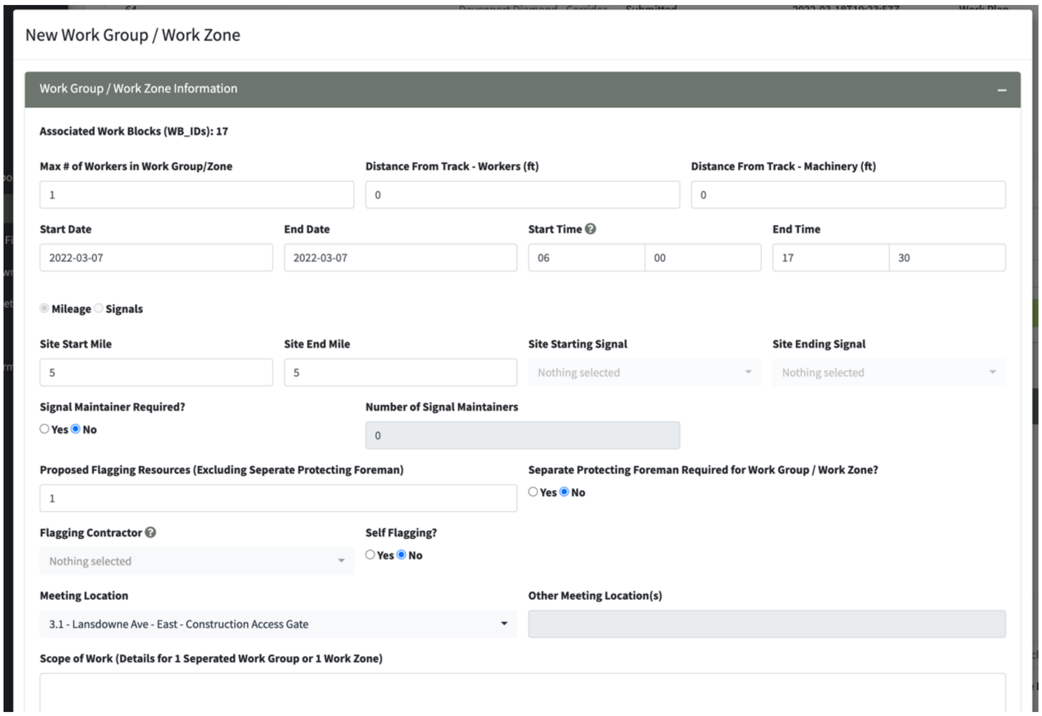
1. Select the Starting Signals for the tracks that you are working.
2. Select the Ending Signals. NOTE: The Ending Signals are limited to the tracks specified by the Starting Signals.
3. Confirm tracks in the Track Segment section. The tracks available correspond to the signals selected.

For more information on modifying Work Blocks and Work Groups, see Modifying Work Blocks And Work Groups.

Add a Work Group to a Work Block (NEW)

To add a work group to a work block or to multiple work blocks:

1. On the Work Events page with your project and existing work event selected, click on a work block in the table to select it. You may select multiple work blocks if you want to assign them to the same work group.
2. Click the Add Work Group/Zone button. The New Work Group/Work Zone pop-up appears.



3. Complete all required information in the Work Group/Work Zone Information section.
   - Max # of Workers in Work Group/Zone
   - Distance From Track – Workers (ft)
   - Distance From Track – Machinery (ft)
   - Start Date
   - End Date
   - Start Time
   - End Time
   - Site Start Mile
   - Site End Mile
   - Start Signal
   - End Signal
   - Signal Maintenance Required?
   - Number of Signal Maintainers
   - Proposed Flagging Resources

- Separate Protecting Foreman Required for Work Group / Work Zone?
- Flagging Contractor
- Self Flagging?: If you plan to manage flagging yourself, click Yes in the Self Flagging? Field and select your contractor from a dropdown list in the Flagging Contractor field. If you don't plan on managing flagging yourself, click No in the Self Flagging? field and indicate your proposed number of flagmen.
- Meeting Location
- Other Meeting Locations
- Scope of Work
- List of Machinery
- Notes for Flagging Team
- Time Required to Clear Track (Minutes): If this is less than one, click the Less than 1 minute required to clear track checkbox.

4. In the Available Work Plans section, any work plans associated with the project are listed. If you have already added the appropriate work plan to the project, select it from the Assigned Work Plan dropdown list and click the Save button.

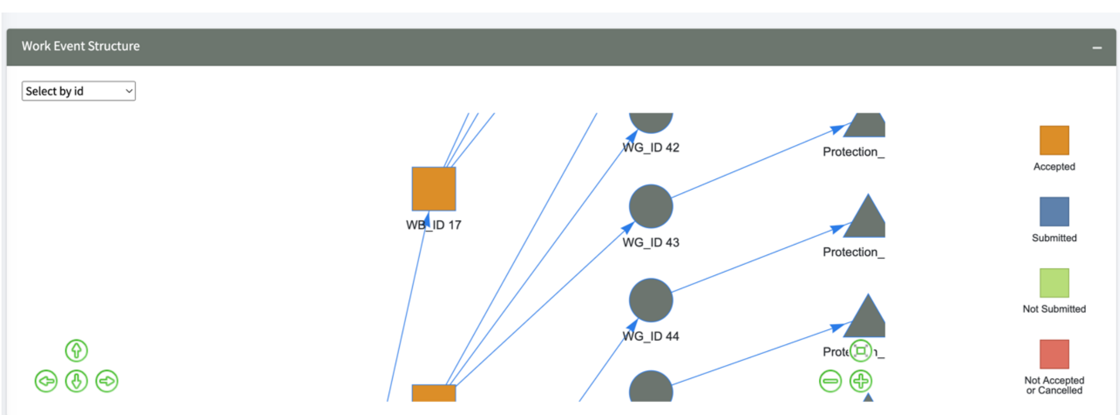
5. If you need a work plan, but you haven't added it to the project yet, click the Save button. Upload the work plan and then edit this work group to assign the work plan.

NOTE: If you specified your Work Block limits using signals, then the Work Group limits must also be specified using signals. The signal choices match the signals selected in the Work Block – you will not be able to specify signals that we not identified in the Work Block.

For more information on modifying Work Blocks and Work Groups, see Modifying Work Blocks And Work Groups.

Review the Work Event Structure (NEW)

Review the work event structure to ensure all of the work groups and work blocks are represented.



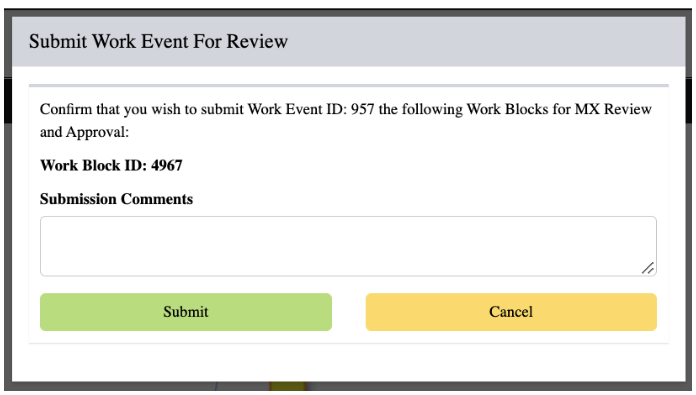
- To select a work block in the diagram, click the drop-down list and select the work block ID or click on the work block in the diagram.
- To zoom in or out from the diagram, click the plus (+) or minus (-) buttons or use the mouse scroll.
- To move the diagram, click the arrow buttons or click and drag with the mouse cursor.
- To see more information about the selected work block, hover over the block. A pop-up appears.

Step 3: Submitting your application for access

Once you have submitted your work event booking request and added all relevant work blocks, work groups, and supporting documentation, you can submit your application for access.

To submit your application for access:

1. Click the Submit Rail Corridor Access Request button. The Submit Work Event for Review pop-up appears.

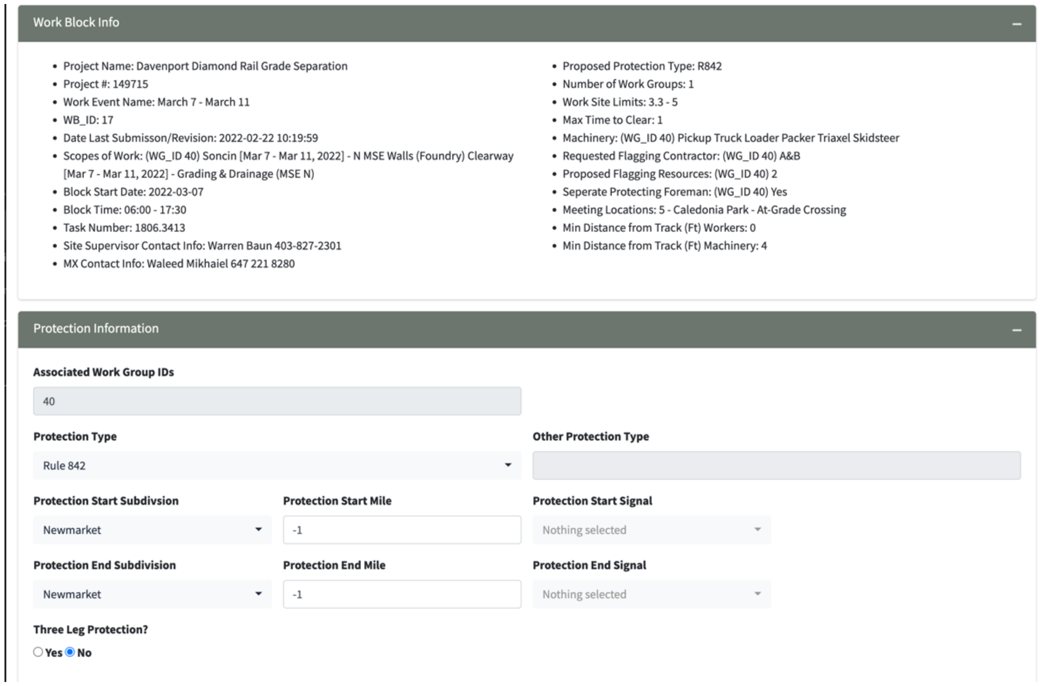


2. Enter comments in the text field if necessary. These comments are included in the email notifications for the request.
3. Click the Submit button.

Assign Protection to a Work Group (NEW)

To assign protection to a work group:

1. On the Work Events page with your project and existing work event selected, click on a work group to select it.
2. Click the Assign Protection button. The Assign Protection pop-up appears.



3. Complete all required information in the Protection Information section.
    - Protection Type
    - Other Protection Type
    - Protection Start Subdivision
    - Protection Start Mile
    - Protection Start Signal
    - Protection End Subdivision
    - Protection End Mile
    - Protection End Signal
    - Three Leg Protection?
    - Protection Limit Third Leg Subdivision
    - Protection Limit Third Leg Mile
    - Protection Limit Third Leg Signal
    - Number of Flagging Resources
    - Assigned Flagging Coordinator
    - Additional Flagging Notes
4. Click the checkbox for Set Work Block Status to “In Review” if necessary.
5. Click the Save button.

Modifying Work Blocks and Work Groups (NEW)

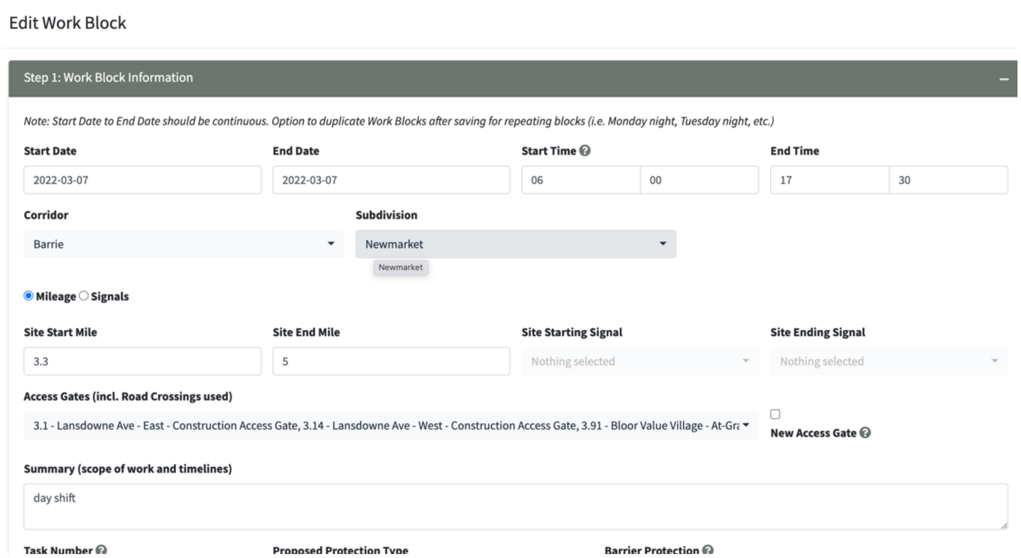
PERMISSION NEEDED: All users.

If you are a contractor or project dev, you can modify your saved work blocks and work groups as needed **only before the most recent T- minus process deadline**. RCAC-level users and higher may edit work blocks and work groups at any time.

Edit a Work Block

To edit a work block:

1. On the Work Events page with your project and existing work event selected, click on a Work Block in the table to select it.
2. Click the Edit button. The Edit Work Block dialog box appears.



3. Edit the fields as needed. For information about the fields, see [Step 2: Adding work blocks and work groups](#).
4. When you're finished modifying the fields, click the Save button.

Duplicate a Work Block

To duplicate a work block:

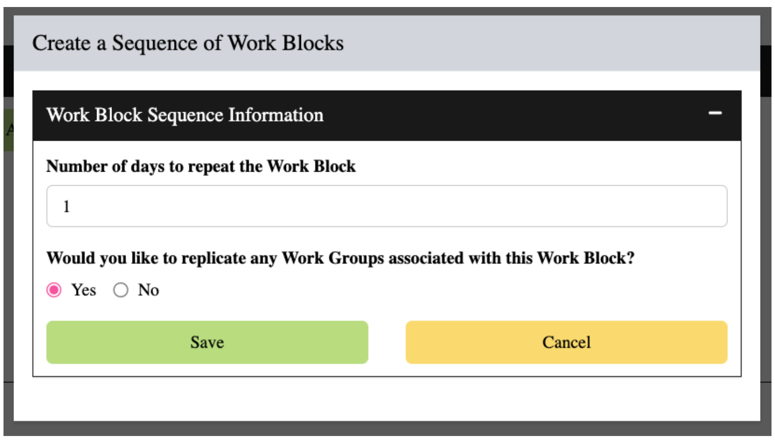
1. On the Work Events page with your project and existing work event selected, click on a Work Block in the table to select it.
2. Click the Duplicate button. The New Work Block dialog box appears and the information from the selected work block that you duplicated is populated in the fields for you.

Create a Sequence of Work Blocks

Work is often repeated day to day, so you should create the work groups associated with a work block before creating a sequence. By doing this, you can include the work groups when you replicate a work block.

To create a sequence of work blocks:

1. On the Work Events page with your project and existing work event selected, click on a Work Block in the table to select it.
2. Click the Sequence button.



3. Enter the number of days to repeat the selected work block.
4. Choose Yes or No for whether you want to replicate any Work Groups associate with the Work Block.
5. Click the Save button. A dialog box appears to confirm that you want to replicate the selected Work Block.
6. Click the Yes button to continue.

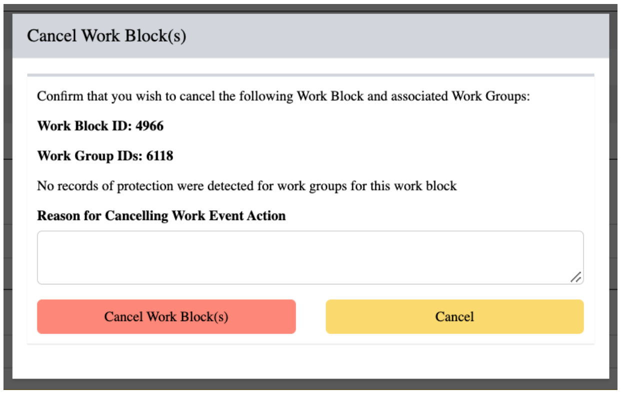
Delete/Cancel a Work Block

If you are a contractor or project dev, you can delete a work block that has not been submitted. However, if the work block has been submitted, you can only cancel that work block until the deadline. However, an RCAC can cancel the work block at any point. If you are a contractor or project dev and want to cancel a work block, but the deadline has passed, please contact an RCAC to cancel the work block for you.

To delete or cancel a work block:

1. On the Work Events page with your project and existing work event selected, click on a Work Block in the table to select it.

2. Click the Delete/Cancel button. The Cancel Work Block(s) pop-up appears.

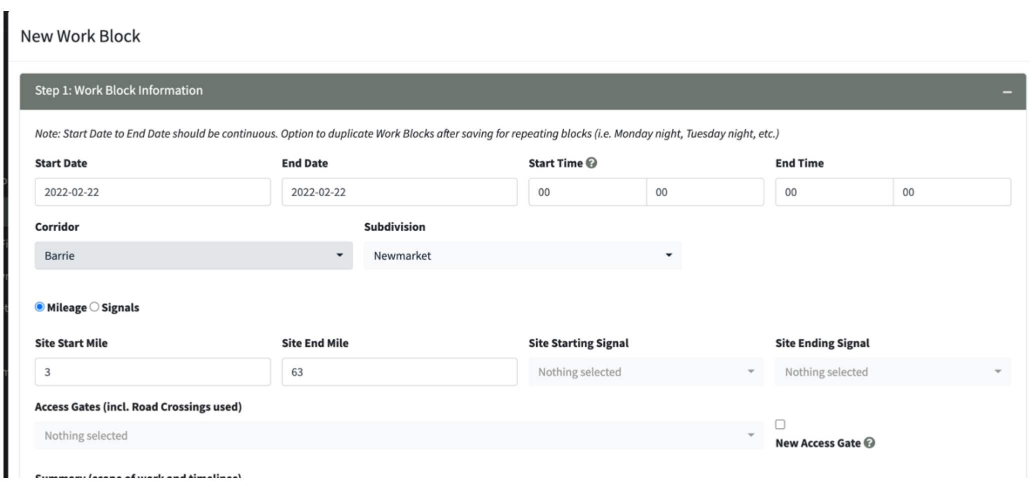


3. Enter the reason for the cancellation in the text box.
4. Click the Cancel Work Block(s) button.

Add a Work Group from a Template

To add a new work group from a template:

1. On the Work Events page with your project and existing work event selected, click on an existing work group to select it.
2. Click the New From Template button. The New Work Group/Work Zone pop-up appears. The fields are pre-populated with information from the work group you selected in the prior step. The work group will be assigned to the same work block as the work group selected in the prior step.



3. Complete all required information in the Work Group/Work Zone Information section. See Add a Work Group to a Work Block for information about the fields.

4. In the Available Work Plans section, any work plans associated with the project are listed. If you have already added the appropriate work plan to the project, select it from the Assigned Work Plan dropdown list and click the Save button.
5. If you need a work plan, but you haven't added it to the project yet, click the Save button. Upload the work plan and then edit this work group to assign the work plan.

Edit a Work Group

To edit a work group:

1. On the Work Events page with your project and existing work event selected, click on a work group to select it.
2. Click the Edit button. The Edit Work Group/Work Zone pop-up appears.
3. Edit the fields as needed. See Add a Work Group to a Work Block for information about the fields.
4. Click the Save button to save your changes.

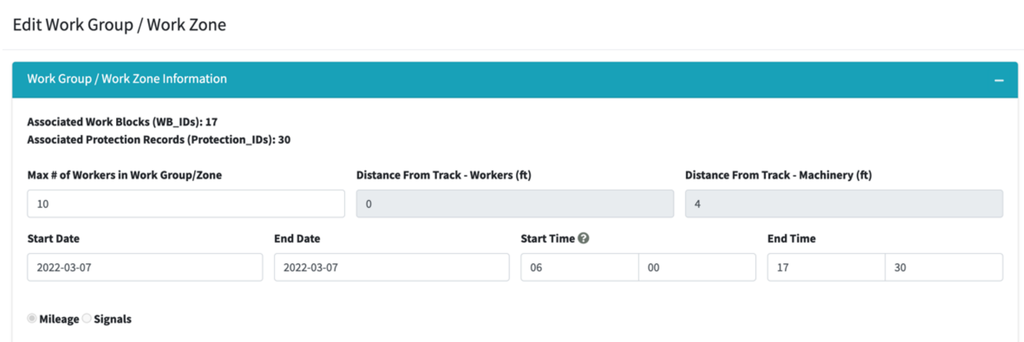
Batch Edit Work Groups

To batch edit work groups:

1. On the Work Events page with your project and existing work event selected, click on the work groups to select them.
2. Click the Batch Edit pop-up appears.

3. Click the checkbox for each field you want to edit.

4. Click the Continue button. The Edit Work Groups/Work Zones pop-up appears. The fields you selected are enabled; the fields you did not check in the Batch Edit pop-up are disabled.

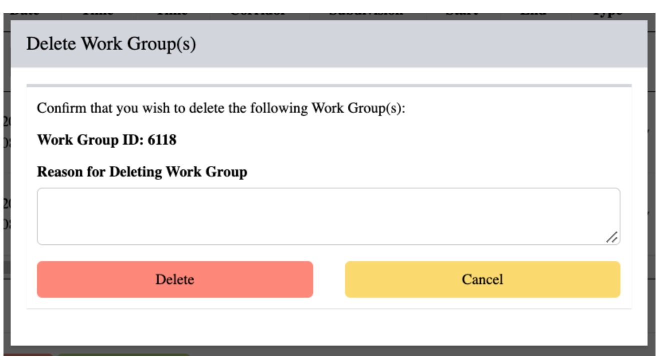


5. Edit the fields you selected on the Batch Edit pop-up.
6. Click the Save button to save your changes to the selected work groups.

Delete a Work Group

To delete a work group:

1. On the Work Events page with your project and existing work event selected, click on a work group to select it.
2. Click the Delete button. The Delete Work Group(s) pop-up appears.



3. Enter your reason for deleting the work group in the text box.
4. Click the Delete button. A confirmation message appears to let you know the work group was deleted.

Monitoring the Status of Requests

PERMISSION NEEDED: All users.

After you have submitted a request, the status will change to "Submitted." Following review, Metrolinx RCAC will update the status to one of the following:

- In review
- Approved
- Review
- Rejected
- Cancelled

The Work Blocks section on your dashboard is an easy way to see the status of all your work blocks.

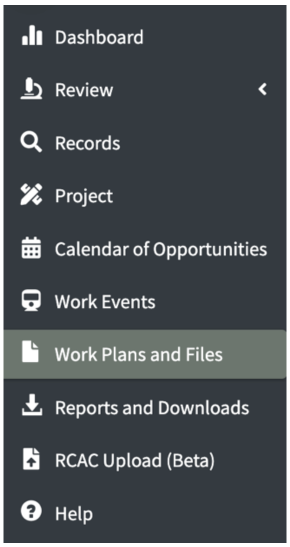
Working with Work Plans and Files (NEW)

PERMISSION NEEDED: All users.

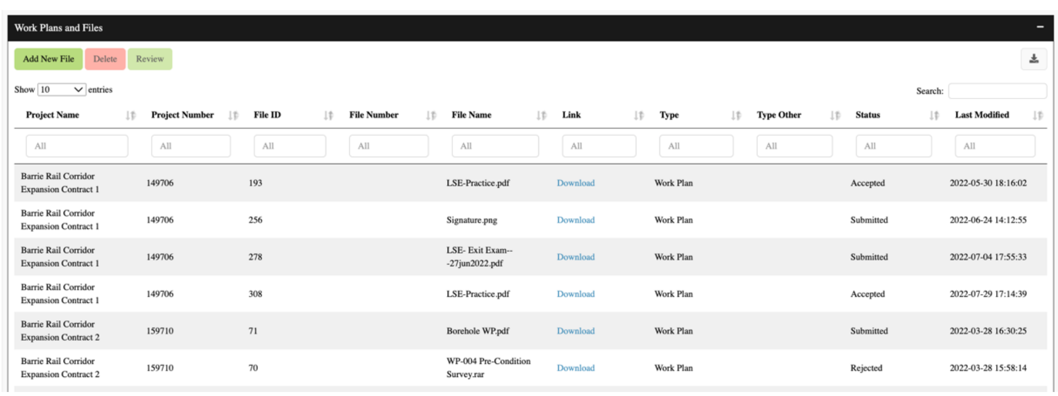
Upload a New Work Plan or File

To upload a new work plan, contingency plan, or any other file associated with a project:

1. From the main menu, click Work Plans and Files.

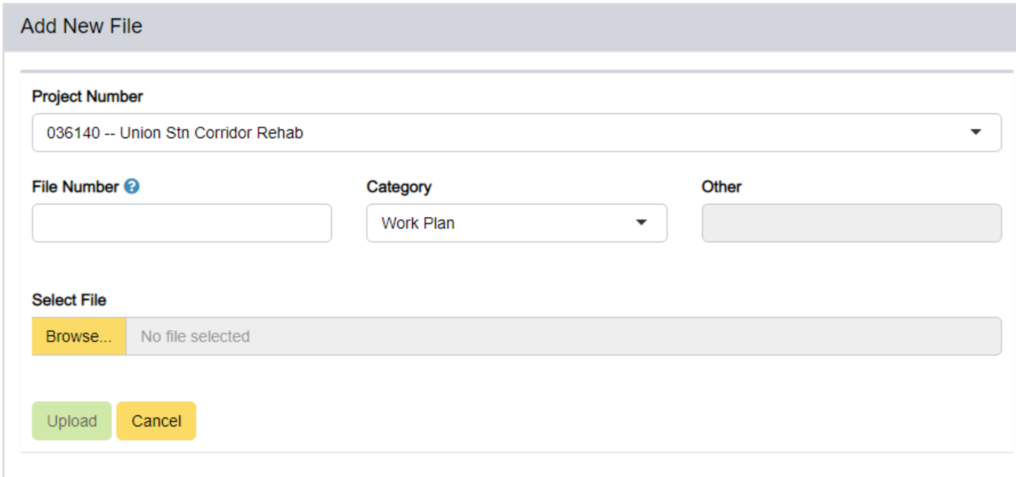


All existing work plans associated with your projects are shown in a list.



Project Name	Project Number	File ID	File Number	File Name	Link	Type	Type Other	Status	Last Modified
All	All	All	All	All	All	All	All	All	All
Barrie Rail Corridor Expansion Contract 1	149706	193		LSE-Practice.pdf	Download	Work Plan		Accepted	2022-05-30 18:16:02
Barrie Rail Corridor Expansion Contract 1	149706	256		Signature.png	Download	Work Plan		Submitted	2022-06-24 14:12:55
Barrie Rail Corridor Expansion Contract 1	149706	278		LSE- Exit Exam---27jun2022.pdf	Download	Work Plan		Submitted	2022-07-04 17:55:33
Barrie Rail Corridor Expansion Contract 1	149706	308		LSE-Practice.pdf	Download	Work Plan		Accepted	2022-07-29 17:14:39
Barrie Rail Corridor Expansion Contract 2	159710	71		Borehole WP.pdf	Download	Work Plan		Submitted	2022-03-28 16:30:25
Barrie Rail Corridor Expansion Contract 2	159710	70		WP-004 Pre-Condition Survey.rar	Download	Work Plan		Rejected	2022-03-28 15:58:14

2. Click Add New File. The Add New File pop-up appears.



3. Complete the fields on the pop-up.
    - Project Number: Select the project from the drop-down list.
    - File Number: This is an optional field that you can use if you want to tag the file with a specific reference code or number (for example, workplan number).
    - Category: The category of the file you're adding. The options are Work Plan, Contingency Plan, and Other. If you select Other for the Category, the Other field will unlock.
    - Other: This field is only available if you select Other in the Category field. Enter a brief file description (for example, "reference document").
4. Click the Browse button. A file explorer window opens.
5. Navigate to the file and click on it to select it.
6. Click the Open button. The file name is added to the file text box and a message appears to tell you when the file is uploaded.
7. When the upload is complete, click the Upload button. The file is added to the Work Plans and Files list.

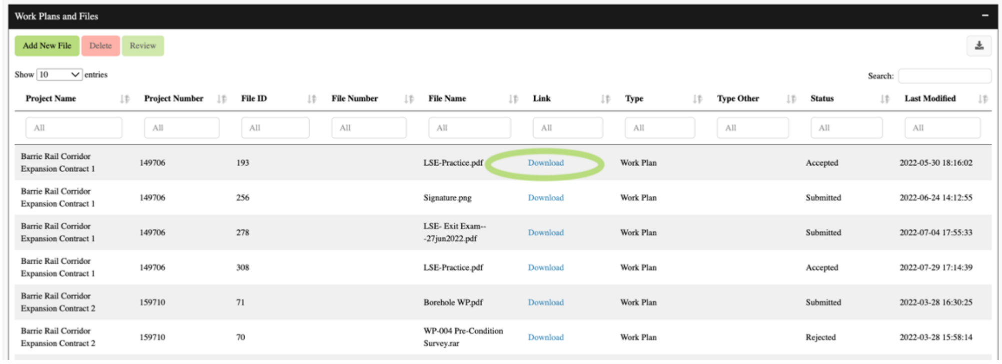
Different files can have the same name when you upload them, because NAPT assigns a unique File ID to each uploaded file.

If a file will not upload, it's likely that there's something in the PDF that was considered a risk by the firewall. Try saving the file as a new PDF and attempt to upload it again.

Download a Work Plan or File

To download a work plan or file:

1. On the Work Plans and Files page, find the file you want to download.
2. Click the Download link for the file you want.

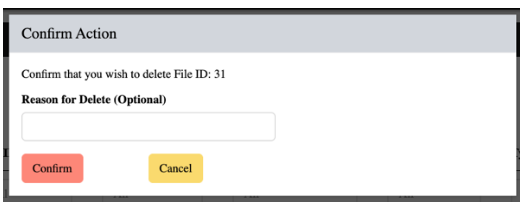


3. The file is downloaded to your computer.

Delete a Work Plan or File

To delete a work plan or file:

1. On the Work Plans and Files page, click on the file you want to delete.
2. Click the Delete button. A confirmation pop-up appears.



3. Add a reason for deleting the work plan or file if needed.
4. Click the Confirm button.

Resolve Conflicts on a Work Plan or File Deletion

If a work plan or file is referenced by any work groups, you will see a Work Group Conflict error when you attempt to delete it. After you click the Delete button then the Confirm button on the confirmation pop-up, you'll see a pop-up like this:

To resolve this conflict, please contact your admin.

Note: If the work plan has been used, it cannot be deleted by an admin. That work plan must remain in the system.

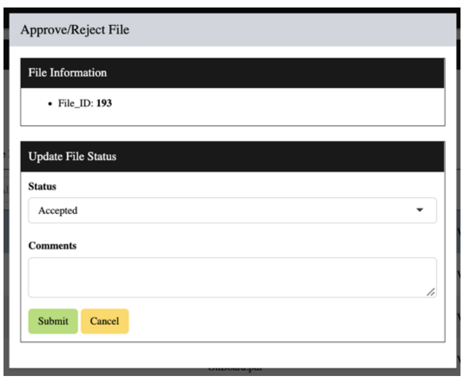
Updating a Work Plan or File Status

PERMISSION NEEDED: Metrolinx PDT/Project Dev and above.

You must have at least one work plan with an "Accepted" status to submit your work event for review. While you can create a work event with no work plans or with work plans that aren't marked as accepted, you won't be able to submit the work event until you change the status of at least one work plan on that work event.

To update a work plan or file status:

1. On the Work Plans and Files page, click on the file you want to review.
2. Click the Review button. The Approve/Reject File pop-up appears.



3. Complete the fields as follows:
    - Status: Choose from the drop-down list. Options are
        - Submitted
        - Under Review
        - Accepted
        - Accepted High Risk
        - Accepted Low Risk
        - Rejected
    - Comments: Enter comments as needed.
4. Click the Submit button. A message appears to tell you that the file has been updated.

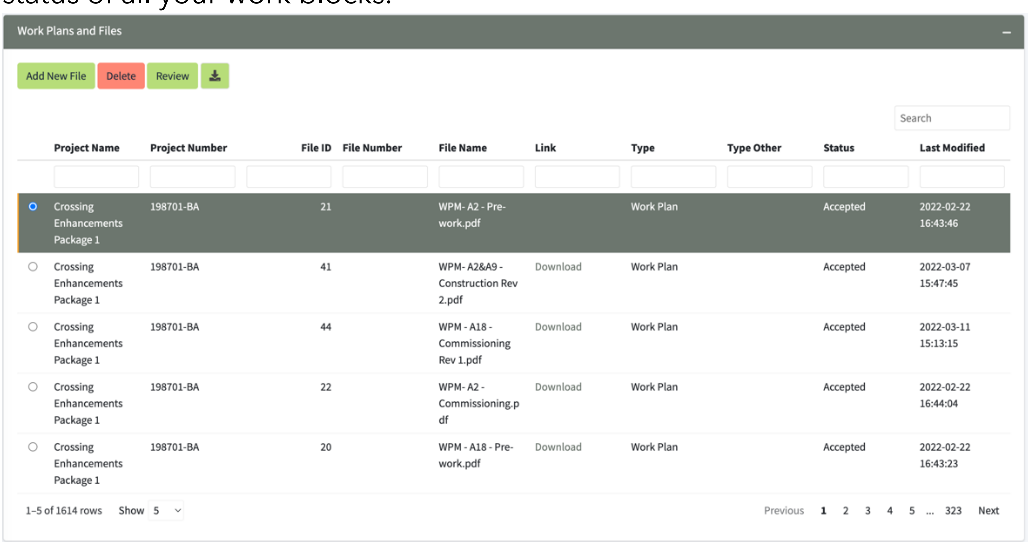
Updating Work Block Status

PERMISSION NEEDED: RCAC Role and higher.

Although you can do this directly from the dashboard per the previous section, there is another way to update the status of a work block status:

1. From the main menu, click Work Events.
2. Under Step 1: Work Event Booking Request, select the associated project and existing work event.
3. Scroll down to Step 2: Work Blocks and Work Groups.
4. Using the filters below the column names, find and click the work block(s) you want to update.
5. Click Review.
6. Select the appropriate status from the dropdown box, add comments if needed, and click Submit.

The Work Blocks section on your dashboard is an easy way to see the status of all your work blocks.



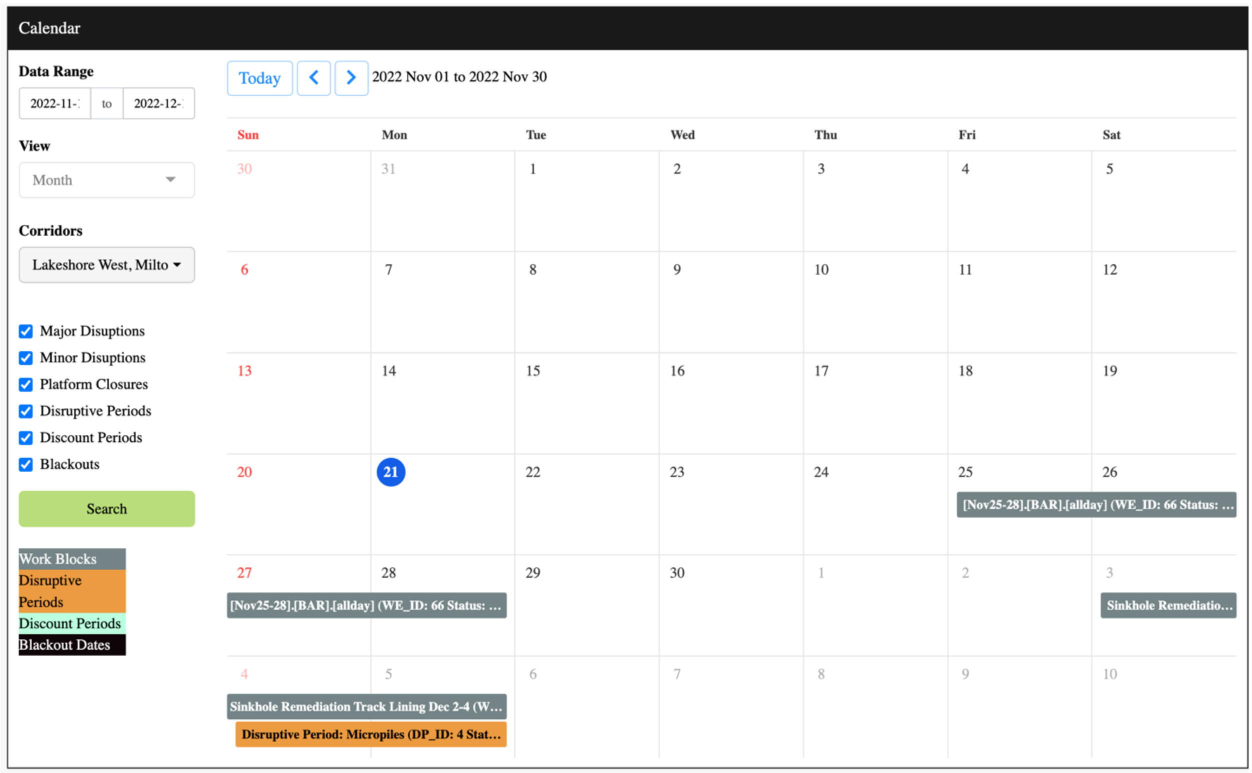
Using the Calendar of Opportunities (NEW)

The Calendar of Opportunities shows information about projects and when and where they're taking place. Before you schedule a Work Event Request, you should check the Calendar of Opportunities to schedule your work event for the best time possible.

To see the Calendar of Opportunities, click Calendar of Opportunities on the main menu. The Calendar of Opportunities page appears with the Calendar at the top.

Using the Calendar

The calendar section at the top of the Calendar of Opportunities page allows you to see when work events are scheduled.



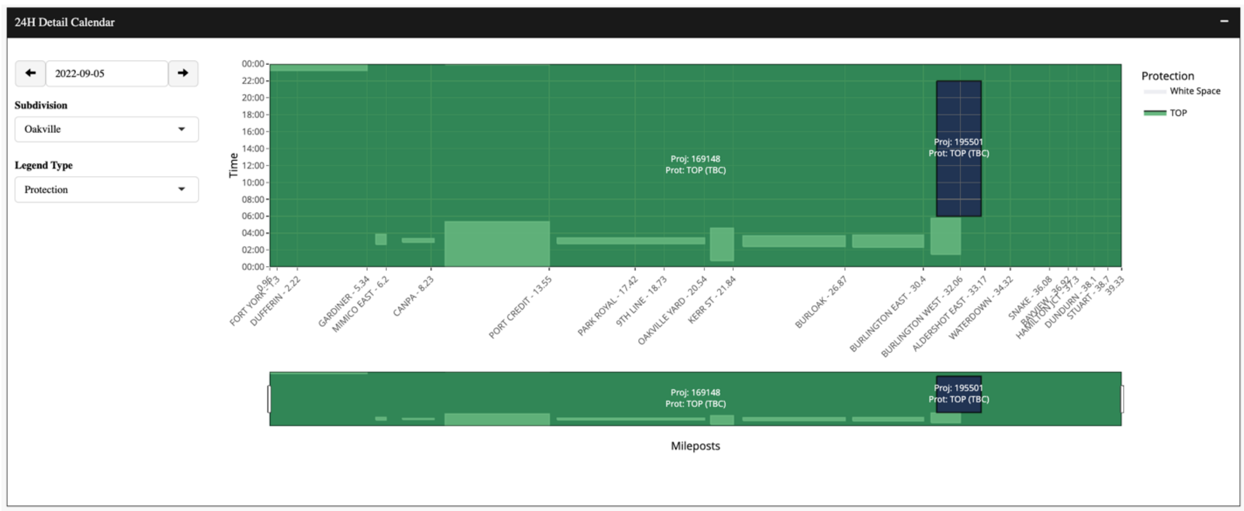
To use the calendar:

- Set the date range you want to see by selecting the start date and end date for the range you want to see.
- Select the corridors you want to see by clicking in the field and selecting the corridors from the drop-down list. You'll need to remove the All option from the field.
- Check or uncheck the boxes for the items you want to see, such as major disruption, minor disruption, discount periods, and blackouts.

- After you've selected your options, click the Search button to see the results.

Using the 24H Detail Calendar

The 24H Detail Calendar shows more detail about scheduled events for a selected day, including white space blocks, which are times that are convenient for work to be done. Check this calendar before submitting a work event request to find the best time for the work event.



To use the 24H Detail Calendar:

1. Select the date you want to view in the date field.
2. Select the subdivision you want from the Subdivision drop-down list.
3. Select the Legend Type from the drop-down list. The options are Protection and Status.
4. On the legend on the right side, you can click on an item once to remove that item from the calendar.
5. To view only one of the items on the legend on the right side, double-click on it.
6. Click and drag on a portion of the calendar to view only that portion on the calendar.
7. Click and drag the sliders at the ends of the Mileposts block to show only the mileposts you want to see.
8. Hover your mouse over a calendar item to see a label with information about that item.

The 24H Calendar can display 'too-much' detail. You can filter the data by selecting or unselecting records in the table below the calendar. You can also use this data to search and filter record types and download the calendar data in Excel format.

Disruptive Possession Requests

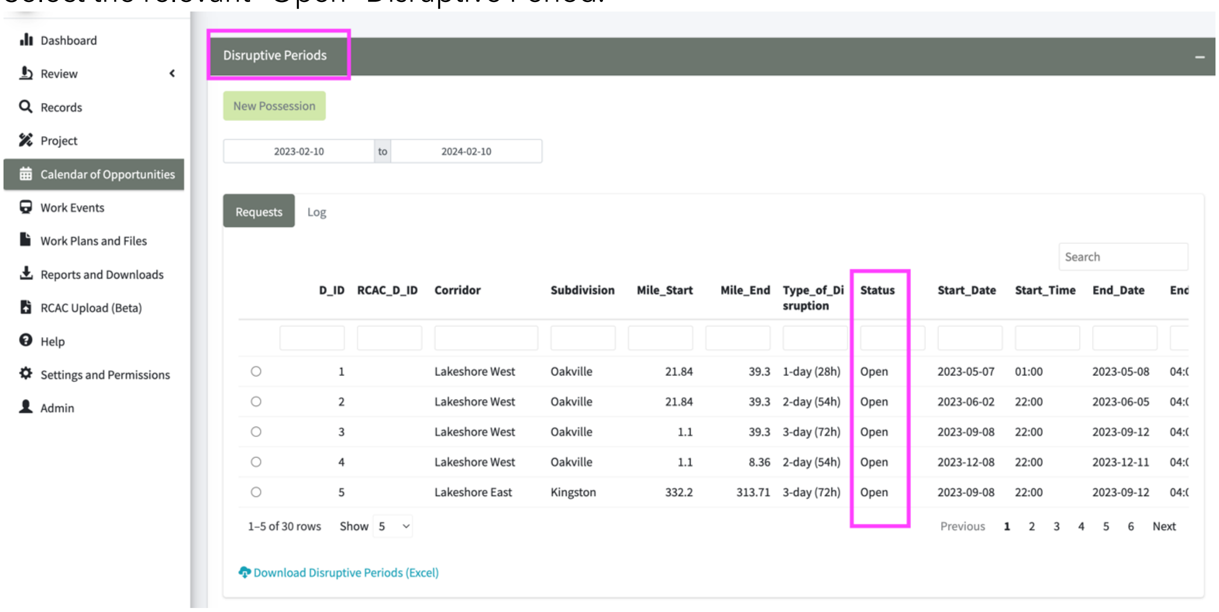
If you are planning to submit a Work Event Request that includes disruptive possession, you must submit a Disruptive Possession Request prior to submitting the Work Event Request. You may also choose to use an existing disruptive period; check the calendars on the same page to find those.

Note: The Disruptive Possession request should be submitted in according with the most recent T-minus process deadline.

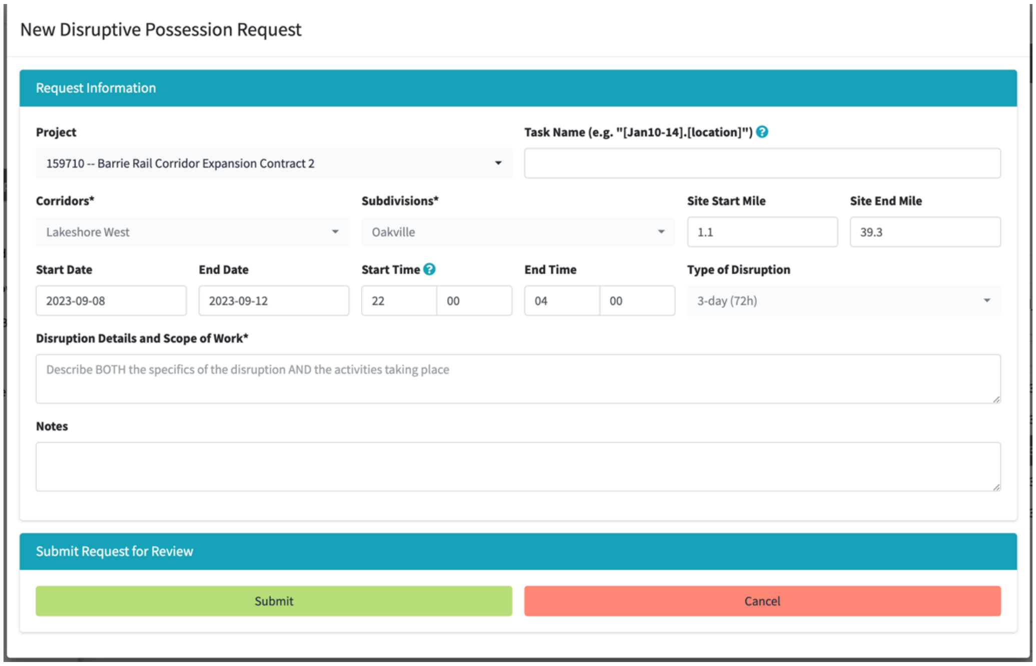
Create a New Disruptive Possession Request

To create a new Disruptive Possession Request:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Disruptive Period section.
3. Select the relevant "Open" Disruptive Period.



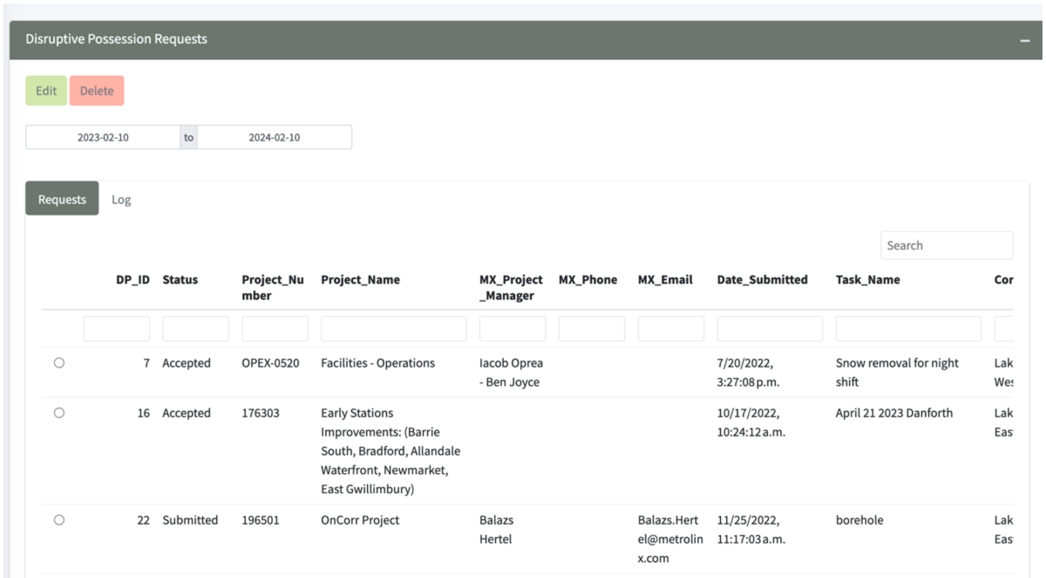
4. Click “New Possession”. The New Disruptive Possession Request pop-up appears.



5. Complete the fields:

   - Project: Select the project from the drop-down list.
   - Task Name: Enter a meaningful name. We recommend that you start with the subdivision /corridor name followed by the summary of work, such as “KItchener - Turnout replace” or “Bala - bridge span replace.” It’s easier to retrieve on the WE page when you select the DP-ID
   - Corridors: Select the corridors from the drop-down list.
   - Subdivisions: Select the subdivisions from the drop-down list.
   - Site Start Mile: Enter the start mile for the site.
   - Site End Mile: Enter the end mile for the site.
   - Start Date: Select the start date from the calendar pop-up.
   - End Date: Select the end date from the calendar pop-up.
   - Start Time: Enter the start time using the up and down arrows for hours and minutes.
   - End Time: Enter the end time using the up and down arrows for hours and minutes.
   - Type of Disruption: Select the type of disruption from the drop-down list.

6. Click the Submit button. Your request is submitted. After your request is submitted, a user from long-term planning will follow up.
7. After the DP-ID is accepted by the long-term planner
8. You can now see monitor the status of your Disruptive Possession request in the Disruptive Possession Request table.



	DP_ID	Status	Project_Number	Project_Name	MX_Project_Manager	MX_Phone	MX_Email	Date_Submitted	Task_Name	Cor
○	7	Accepted	OPEX-0520	Facilities - Operations	Iacob Oprea - Ben Joyce			7/20/2022, 3:27:08 p.m.	Snow removal for night shift	Lak Wes
○	16	Accepted	176303	Early Stations Improvements: (Barrie South, Bradford, Allandale Waterfront, Newmarket, East Gwillimbury)				10/17/2022, 10:24:12 a.m.	April 21 2023 Danforth	Lak Eas
○	22	Submitted	196501	OnCorr Project	Balazs Hertel		Balazs.Hertel@metrolinx.com	11/25/2022, 11:17:03 a.m.	borehole	Lak Eas

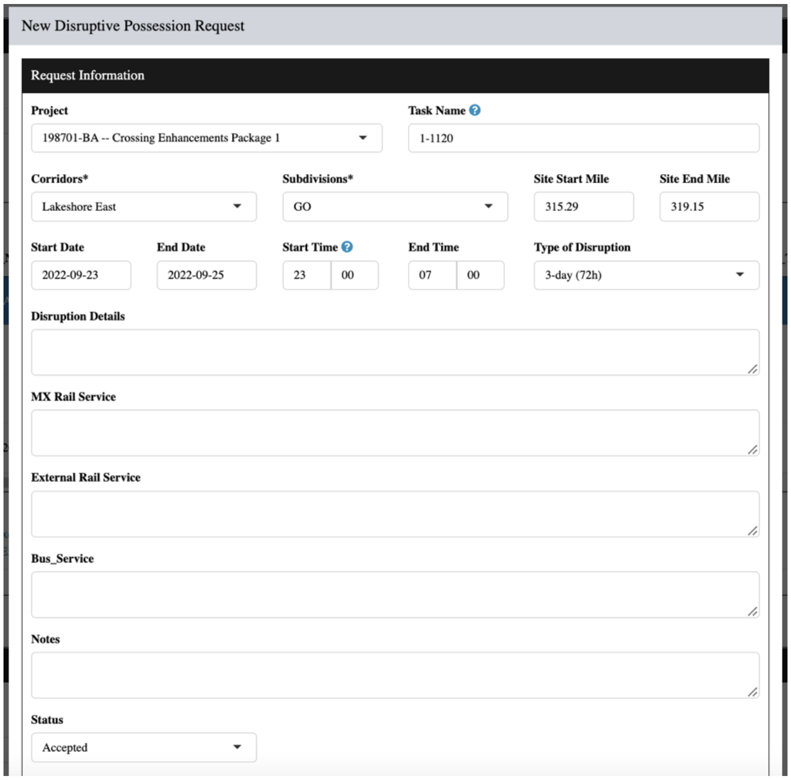
9. Once the request has its status updated to "Accepted", you will be able to submit Work Events in relation to that disruptive period. In the Work Event tab, when creating a new Work Event, select 'Disruptive' as the category and you will see a drop down of all the disruptive periods that are 'open' for booking.

Edit a Disruptive Possession Request (Long-Term Planners Only)

You must have the Long-Term Planner role or above to edit Disruptive Possession Requests.

To edit a Disruptive Possession Request:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Disruptive Possession Requests section.
3. Locate the request in the list that you want to edit and click on it to select it.
4. Click the Edit button.



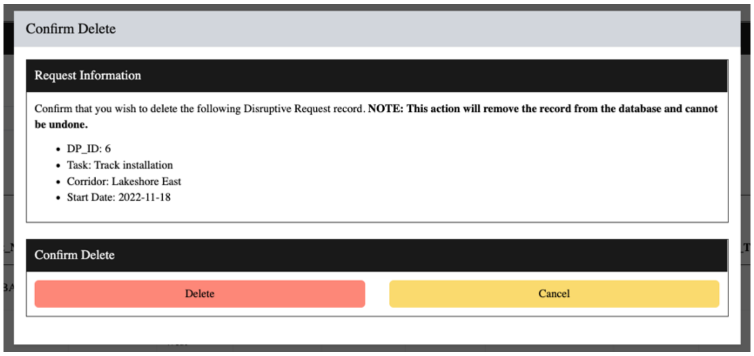
5. In the pop-up, make the changes or additions you need.
6. If you'd like an email confirmation for the changes you made, click the Send Email Confirmation? checkbox.
7. Click the Update button to save your changes.

Delete a Disruptive Possession Request (Long-Term Planners Only)

You must have the Long-Term Planner role or above to delete Disruptive Possession Requests.

To delete a Disruptive Possession Request:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Disruptive Possession Requests section.
3. Locate the request in the list that you want to delete and click on it to select it.
4. Click the Delete button. The Confirm Delete pop-up appears.



5. Click the Delete button to delete the request.

Download Disruptive Possessions

To download a spreadsheet that contains information about disruptive possessions:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Disruptive Possession Requests section.
3. Click the Download Disruptive Possessions link. The spreadsheet is downloaded to your computer.

Download Disruptive Work Blocks

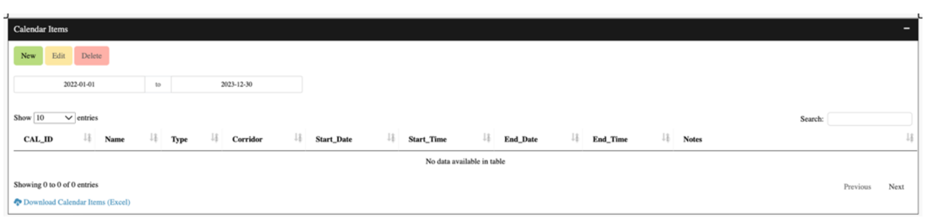
To download a spreadsheet that contains information about disruptive work blocks:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Disruptive Possession Requests section.
3. Click the Download Disruptive Work Blocks link. The spreadsheet is downloaded to your computer.

View Calendar Items

To view calendar items:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Calendar Items section.



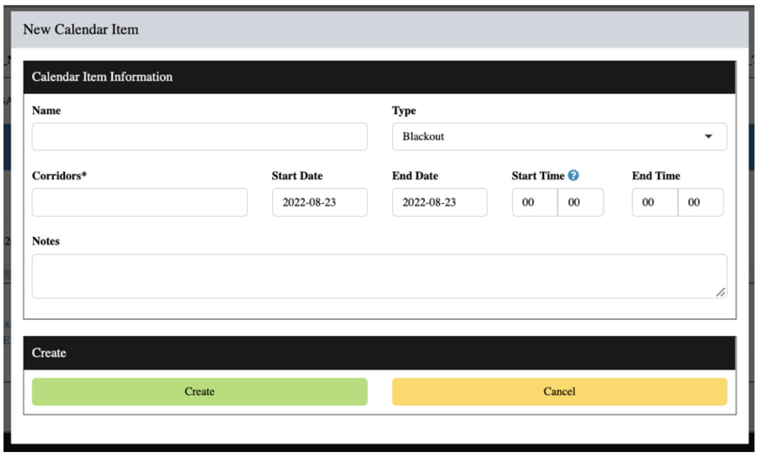
3. Change the date range if needed.

Add a Calendar Item

You must have the Long-Term Planner role or above to add calendar items.

To add a calendar item:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Calendar Items section.
3. Click the New button. The New Calendar Item pop-up appears.



4. Complete the fields:
   - Name: Enter a meaningful name for the calendar item.
   - Type: Select the type of calendar item you're creating.
   - Corridors: Select the corridors from the drop-down list.
   - Start Date: Select the start date from the calendar.
   - End Date: Select the end date from the calendar.
   - Start Time: Enter the start time using the up and down arrows for hours and minutes.
   - End Time: Enter the end time using the up and down arrows for hours and minutes.
   - Notes: Enter information about the calendar item.
5. Click the Create button. The calendar item is created and appears in the list and on the calendar.

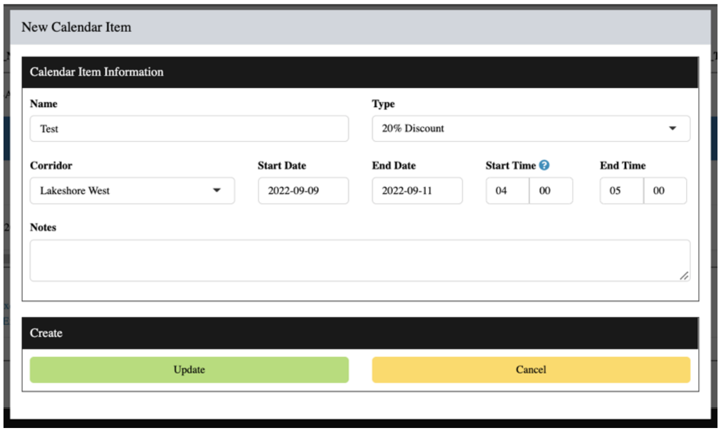
Edit a Calendar Item

You must have the Long-Term Planner role or above to edit calendar items.

To edit a calendar item:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Calendar Items section.
3. Locate the calendar item in the list that you want to edit and click on it to select it.

4. Click the Edit button.



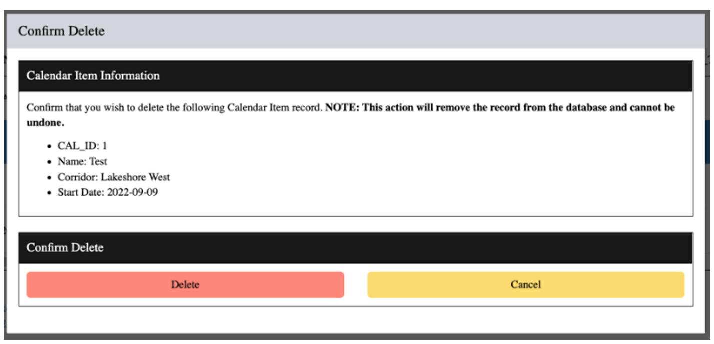
5. In the pop-up, make the changes or additions you need.
6. Click the Update button to save your changes.

Delete a Calendar Item

You must have the Long-Term Planner role or above to delete calendar items.

To delete a calendar item:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Calendar Items section.
3. Locate the calendar item in the list that you want to delete and click on it to select it.
4. Click the Delete button. The Confirm Delete pop-up appears.



6. Click the Delete button to delete the calendar item.

Download Calendar Items

To download a spreadsheet that contains information about calendar items:

1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Calendar Items section.

3. Click the Download Calendar Items link. The spreadsheet is downloaded to your computer.

Working with Projects

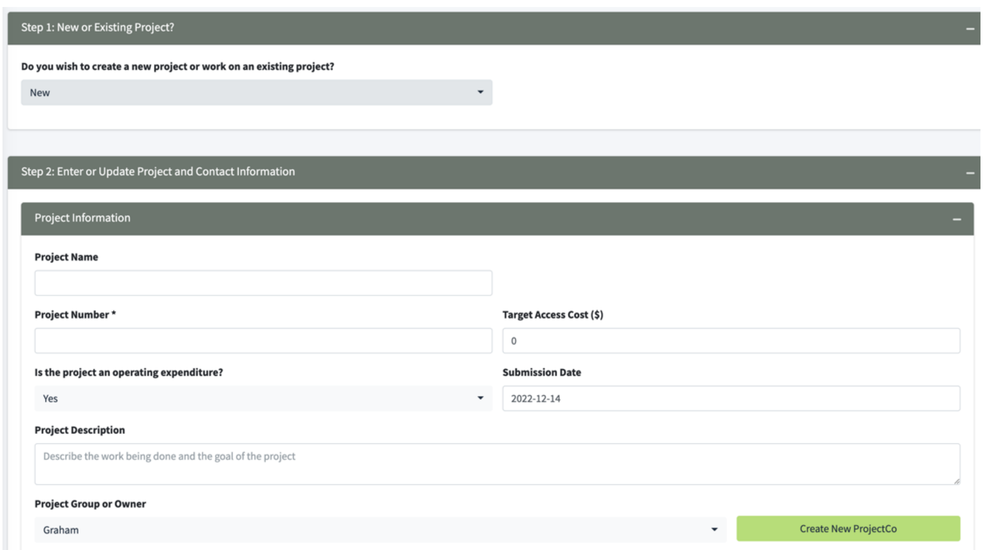
Create a New Project

You must have the Project Dev role or above to create new projects.

Before you can create a new project in NAPT, you must have a project number from the Metrolinx Oracle Database.

To create a new project:

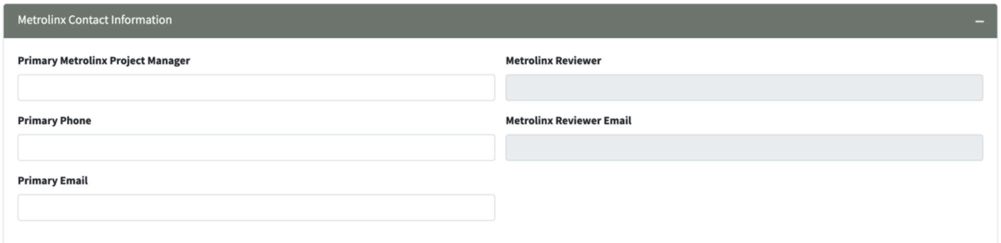
1. From the main menu, click Project. The Project page appears.



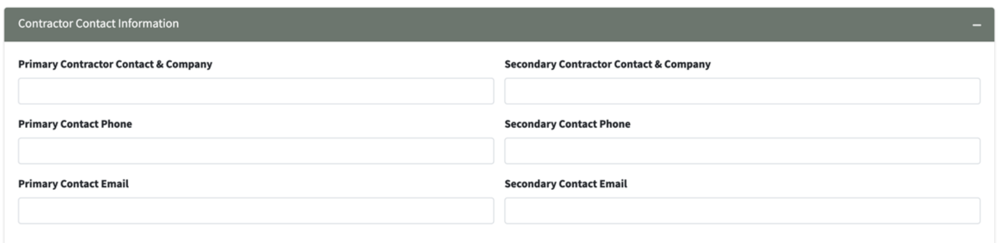
2. In the first section, select New from the dropdown list.
3. In the Step 2: Enter or Update Project and Contact Information, enter the following information:
   - Project Name
   - Project Number
   - Target Access Cost
   - Is the project an operating expenditure?
   - Submission Date
   - Project Description
   - Project Group or Owner
   - Contract Type
   - Summary (Scope of Work and Timelines)
   - Assigned Flagging Contractor

- Anticipated Completion Date

4. Complete the fields in the Metrolinx Contact Information section.



5. Complete the fields in the Contractor Contact Information section.



6. Click the Create New Project button.

Create a New Project Group or Owner (NEW)

To a new project group or owner (company):

1. In the Project Information section on the new project page, click the Create New ProjectCo button.

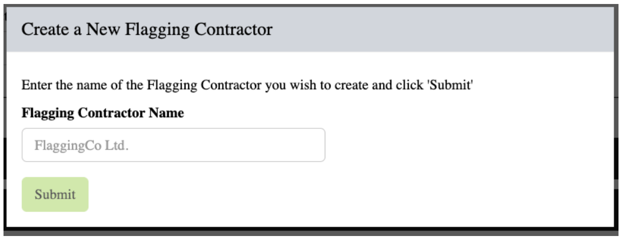
2. Enter the company name.
3. Click the Submit button. The company is added, and you can now select the company for the project.

Create a New Flagging Contractor (NEW)

PERMISSION NEEDED: Metrolinx RCAC and above.

To create a new flagging contractor:

1. In the Project Information section on the new project page, click the Create New Flagging Contractor button.



4. Enter the contractor's name.
5. Click the Submit button. The contractor is added, and you can now select the contractor for the project.

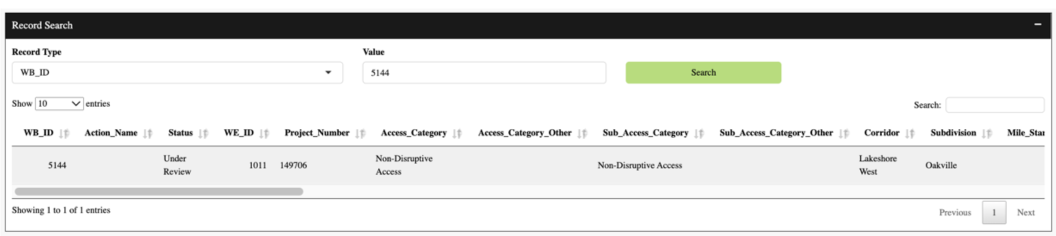
Using Records (NEW)

Searching Records

To search records:

1. On the main menu, click Records. The Records page appears.

2. In the Record Search box, select what you want to search for in the Record Type drop-down list. The options are:
   - Work Event ID (WE_ID)
   - Work Block ID (WB_ID)
   - Work Group ID (WG ID)
   - Protection ID
3. Enter the number you want to search for in the Value field.
4. Click the Search button. The search results appear, showing the item you searched for.



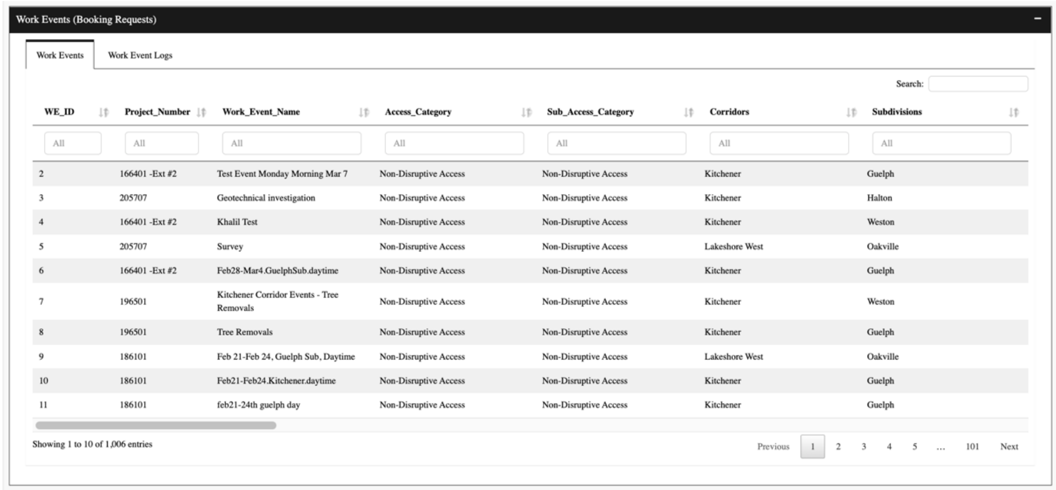
   If no records are found that match the value you entered, a message appears to tell you that.

   Note: If no records are found, it may be because you don't have access to the project related to the ID you were searching for.

Viewing a List of Work Events and Work Event Logs

To view a list of all of the work events as well as work event logs:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Work Events (Booking Requests) section to expand it if needed. A list of work events appears.



Work Events (Booking Requests)

Work Events | Work Event Logs

Search:

WE_ID	Project_Number	Work_Event_Name	Access_Category	Sub_Access_Category	Corridors	Subdivisions
All	All	All	All	All	All	All
2	166401 -Ext #2	Test Event Monday Morning Mar 7	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Guelph
3	205707	Geotechnical investigation	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Halton
4	166401 -Ext #2	Khalil Test	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Weston
5	205707	Survey	Non-Disruptive Access	Non-Disruptive Access	Lakeshore West	Oakville
6	166401 -Ext #2	Feb28-Mar4.GuelphSub.daytime	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Guelph
7	196501	Kitchener Corridor Events - Tree Removals	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Weston
8	196501	Tree Removals	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Guelph
9	186101	Feb 21-Feb 24, Guelph Sub, Daytime	Non-Disruptive Access	Non-Disruptive Access	Lakeshore West	Oakville
10	186101	Feb21-Feb24.Kitchener.daytime	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Guelph
11	186101	feb21-24th guelph day	Non-Disruptive Access	Non-Disruptive Access	Kitchener	Guelph

Showing 1 to 10 of 1,006 entries

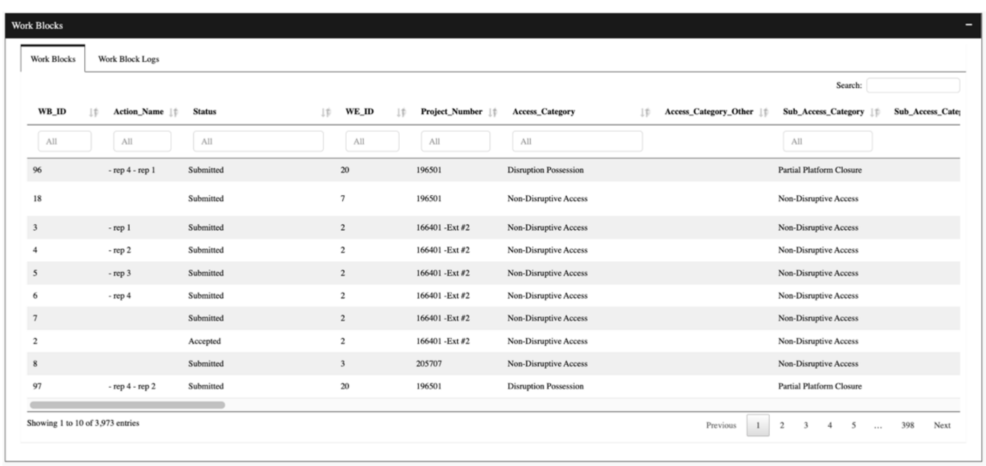
Previous 1 2 3 4 5 … 101 Next

3. You can sort and filter this list and you can use the search box to locate work events. However, you cannot open a work event from this list.
4. Click the Work Event Logs tab to view a list of instances where a user made a change to a work event.

Viewing Work Blocks and Work Block Logs

To view a list of all of the work blocks as well as work block logs:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Work Blocks section to expand it if needed. A list of work blocks appears.



Work Blocks

Work Blocks | Work Block Logs

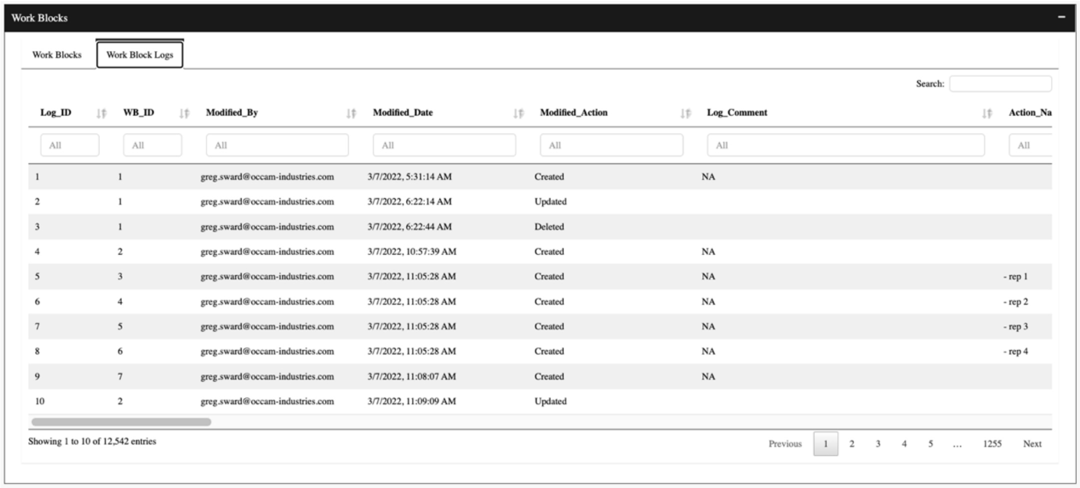
Search:

WB_ID	Action_Name	Status	WE_ID	Project_Number	Access_Category	Access_Category_Other	Sub_Access_Category	Sub_Access_Cate
All	All	All	All	All	All		All	
96	- rep 4 - rep 1	Submitted	20	196501	Disruption Possession		Partial Platform Closure	
18		Submitted	7	196501	Non-Disruptive Access		Non-Disruptive Access	
3	- rep 1	Submitted	2	166401 -Ext #2	Non-Disruptive Access		Non-Disruptive Access	
4	- rep 2	Submitted	2	166401 -Ext #2	Non-Disruptive Access		Non-Disruptive Access	
5	- rep 3	Submitted	2	166401 -Ext #2	Non-Disruptive Access		Non-Disruptive Access	
6	- rep 4	Submitted	2	166401 -Ext #2	Non-Disruptive Access		Non-Disruptive Access	
7		Submitted	2	166401 -Ext #2	Non-Disruptive Access		Non-Disruptive Access	
2		Accepted	2	166401 -Ext #2	Non-Disruptive Access		Non-Disruptive Access	
8		Submitted	3	205707	Non-Disruptive Access		Non-Disruptive Access	
97	- rep 4 - rep 2	Submitted	20	196501	Disruption Possession		Partial Platform Closure	

Showing 1 to 10 of 3,973 entries

Previous 1 2 3 4 5 … 398 Next

3. You can sort and filter this list and you can use the search box to locate work blocks. However, you cannot open a work block from this list.
4. Click the Work Block Logs tab to view a list of instances where a user made a change to a work block.



Work Blocks

Work Blocks | Work Block Logs

Search:

Log_ID	WB_ID	Modified_By	Modified_Date	Modified_Action	Log_Comment	Action_Na
1	1	greg.sward@occam-industries.com	3/7/2022, 5:31:14 AM	Created	NA	
2	1	greg.sward@occam-industries.com	3/7/2022, 6:22:14 AM	Updated		
3	1	greg.sward@occam-industries.com	3/7/2022, 6:22:44 AM	Deleted		
4	2	greg.sward@occam-industries.com	3/7/2022, 10:57:39 AM	Created	NA	
5	3	greg.sward@occam-industries.com	3/7/2022, 11:05:28 AM	Created	NA	- rep 1
6	4	greg.sward@occam-industries.com	3/7/2022, 11:05:28 AM	Created	NA	- rep 2
7	5	greg.sward@occam-industries.com	3/7/2022, 11:05:28 AM	Created	NA	- rep 3
8	6	greg.sward@occam-industries.com	3/7/2022, 11:05:28 AM	Created	NA	- rep 4
9	7	greg.sward@occam-industries.com	3/7/2022, 11:08:07 AM	Created	NA	
10	2	greg.sward@occam-industries.com	3/7/2022, 11:09:09 AM	Updated		

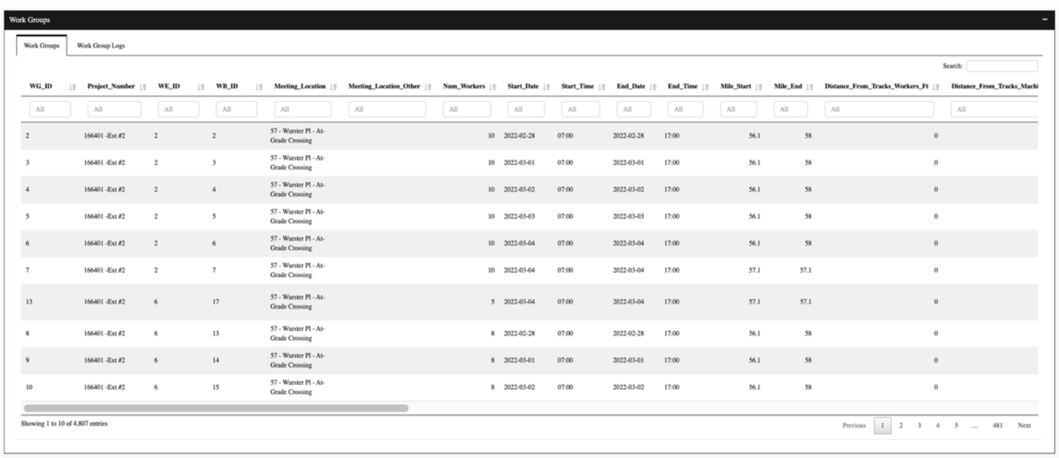
Showing 1 to 10 of 12,542 entries

Previous 1 2 3 4 5 … 1255 Next

Viewing Work Groups and Work Group Logs

To view a list of all of the work groups as well as work group logs:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Work Groups section to expand it if needed. A list of work groups appears.



Work Groups

Work Groups | Work Group Logs

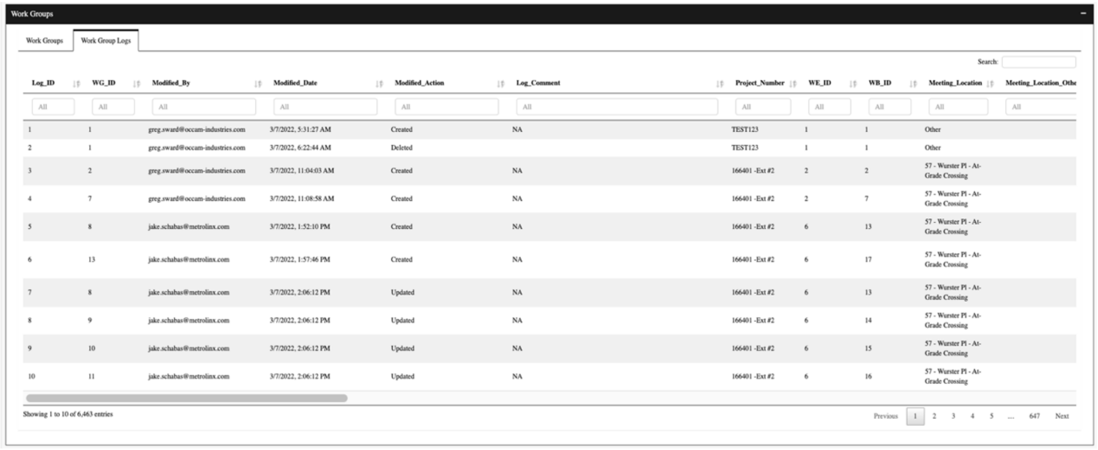
Search:

WG_ID	Project_Number	WE_ID	WB_ID	Meeting_Location	Meeting_Location_Other	Num_Workers	Start_Date	Start_Time	End_Date	End_Time	Mile_Start	Mile_End	Distance_From_Tracks_Workers_Ft	Distance_From_Tracks_Machi
2	166401 -Ext #2	2	2	57 - Wurster Pl - At-Grade Crossing		10	2022-02-28	07:00	2022-02-28	17:00	56.1	58	0	
3	166401 -Ext #2	2	3	57 - Wurster Pl - At-Grade Crossing		10	2022-03-01	07:00	2022-03-01	17:00	56.1	58	0	
4	166401 -Ext #2	2	4	57 - Wurster Pl - At-Grade Crossing		10	2022-03-02	07:00	2022-03-02	17:00	56.1	58	0	
5	166401 -Ext #2	2	5	57 - Wurster Pl - At-Grade Crossing		10	2022-03-03	07:00	2022-03-03	17:00	56.1	58	0	
6	166401 -Ext #2	2	6	57 - Wurster Pl - At-Grade Crossing		10	2022-03-04	07:00	2022-03-04	17:00	56.1	58	0	
7	166401 -Ext #2	2	7	57 - Wurster Pl - At-Grade Crossing		10	2022-03-04	07:00	2022-03-04	17:00	57.1	57.1	0	
13	166401 -Ext #2	6	17	57 - Wurster Pl - At-Grade Crossing		5	2022-03-04	07:00	2022-03-04	17:00	57.1	57.1	0	
8	166401 -Ext #2	6	13	57 - Wurster Pl - At-Grade Crossing		8	2022-02-28	07:00	2022-02-28	17:00	56.1	58	0	
9	166401 -Ext #2	6	14	57 - Wurster Pl - At-Grade Crossing		8	2022-03-01	07:00	2022-03-01	17:00	56.1	58	0	
10	166401 -Ext #2	6	15	57 - Wurster Pl - At-Grade Crossing		8	2022-03-02	07:00	2022-03-02	17:00	56.1	58	0	

Showing 1 to 10 of 4,807 entries

Previous 1 2 3 4 5 … 481 Next

3. You can sort and filter this list and you can use the search box to locate work groups. However, you cannot open a work group from this list.
4. Click the Work Group Logs tab to view a list of instances where a user made a change to a work group.


Work Groups

Work Groups | Work Group Logs

Search:

Log_ID	WG_ID	Modified_By	Modified_Date	Modified_Action	Log_Comment	Project_Number	WE_ID	WB_ID	Meeting_Location	Meeting_Location_Othe
All	All	All	All	All	All	All	All	All	All	All
1	1	greg.sward@occam-industries.com	3/7/2022, 5:31:27 AM	Created	NA	TEST123	1	1	Other	
2	1	greg.sward@occam-industries.com	3/7/2022, 6:22:44 AM	Deleted		TEST123	1	1	Other	
3	2	greg.sward@occam-industries.com	3/7/2022, 11:04:03 AM	Created	NA	166401 -Ext #2	2	2	57 - Wurster Pl - At-Grade Crossing	
4	7	greg.sward@occam-industries.com	3/7/2022, 11:08:58 AM	Created	NA	166401 -Ext #2	2	7	57 - Wurster Pl - At-Grade Crossing	
5	8	jake.schabas@metrolinx.com	3/7/2022, 1:52:10 PM	Created	NA	166401 -Ext #2	6	13	57 - Wurster Pl - At-Grade Crossing	
6	13	jake.schabas@metrolinx.com	3/7/2022, 1:57:46 PM	Created	NA	166401 -Ext #2	6	17	57 - Wurster Pl - At-Grade Crossing	
7	8	jake.schabas@metrolinx.com	3/7/2022, 2:06:12 PM	Updated	NA	166401 -Ext #2	6	13	57 - Wurster Pl - At-Grade Crossing	
8	9	jake.schabas@metrolinx.com	3/7/2022, 2:06:12 PM	Updated	NA	166401 -Ext #2	6	14	57 - Wurster Pl - At-Grade Crossing	
9	10	jake.schabas@metrolinx.com	3/7/2022, 2:06:12 PM	Updated	NA	166401 -Ext #2	6	15	57 - Wurster Pl - At-Grade Crossing	
10	11	jake.schabas@metrolinx.com	3/7/2022, 2:06:12 PM	Updated	NA	166401 -Ext #2	6	16	57 - Wurster Pl - At-Grade Crossing	

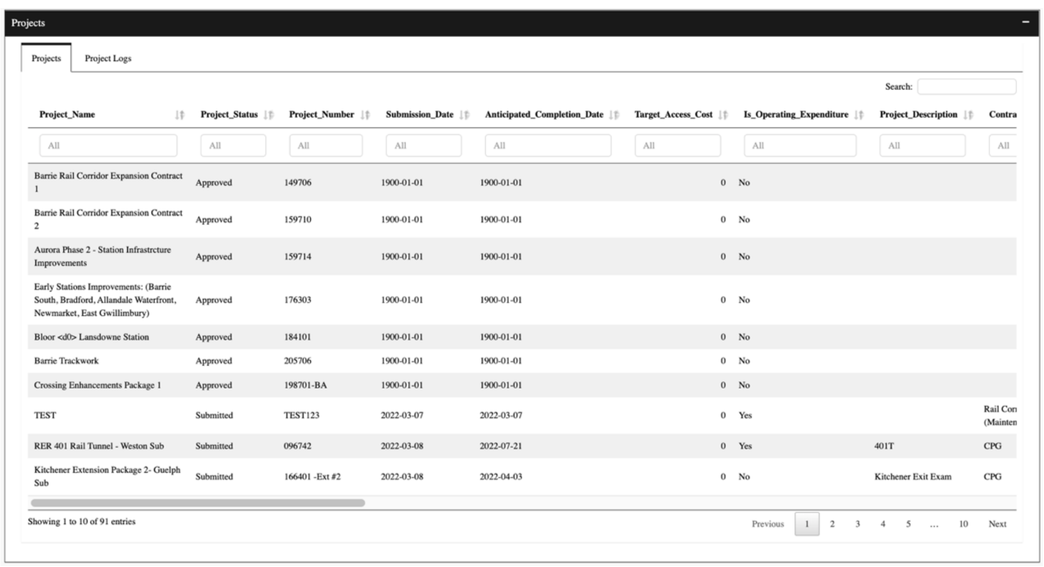
Showing 1 to 10 of 6,463 entries

Previous 1 2 3 4 5 … 647 Next

Viewing Projects and Logs

To view a list of all of the projects as well as project logs:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Projects section to expand it if needed. A list of projects appears.


Projects

Projects | Project Logs

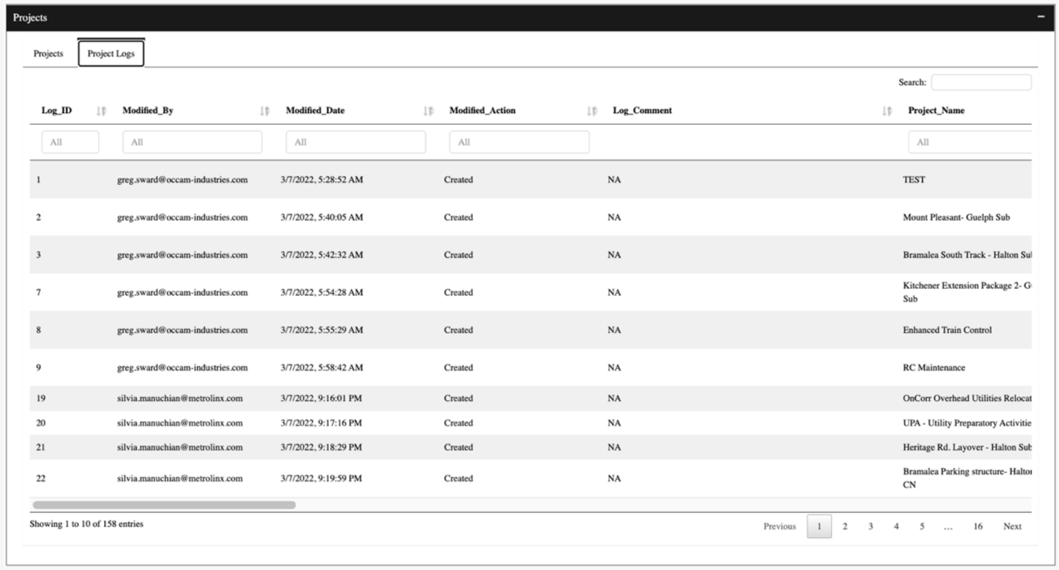
Search:

Project_Name	Project_Status	Project_Number	Submission_Date	Anticipated_Completion_Date	Target_Access_Cost	Is_Operating_Expenditure	Project_Description	Contra
All	All	All	All	All	All	All	All	All
Barrie Rail Corridor Expansion Contract 1	Approved	149706	1900-01-01	1900-01-01	0	No		
Barrie Rail Corridor Expansion Contract 2	Approved	159710	1900-01-01	1900-01-01	0	No		
Aurora Phase 2 - Station Infrastrcture Improvements	Approved	159714	1900-01-01	1900-01-01	0	No		
Early Stations Improvements: (Barrie South, Bradford, Allandale Waterfront, Newmarket, East Gwillimbury)	Approved	176303	1900-01-01	1900-01-01	0	No		
Bloor <d0> Lansdowne Station	Approved	184101	1900-01-01	1900-01-01	0	No		
Barrie Trackwork	Approved	205706	1900-01-01	1900-01-01	0	No		
Crossing Enhancements Package 1	Approved	198701-BA	1900-01-01	1900-01-01	0	No		
TEST	Submitted	TEST123	2022-03-07	2022-03-07	0	Yes		Rail Corr (Mainten
RER 401 Rail Tunnel - Weston Sub	Submitted	096742	2022-03-08	2022-07-21	0	Yes	401T	CPG
Kitchener Extension Package 2- Guelph Sub	Submitted	166401 -Ext #2	2022-03-08	2022-04-03	0	No	Kitchener Exit Exam	CPG

Showing 1 to 10 of 91 entries

Previous 1 2 3 4 5 … 10 Next

3. You can sort and filter this list and you can use the search box to locate projects. However, you cannot open a project from this list.
4. Click the Project Logs tab to view a list of instances where a user made a change to a project.

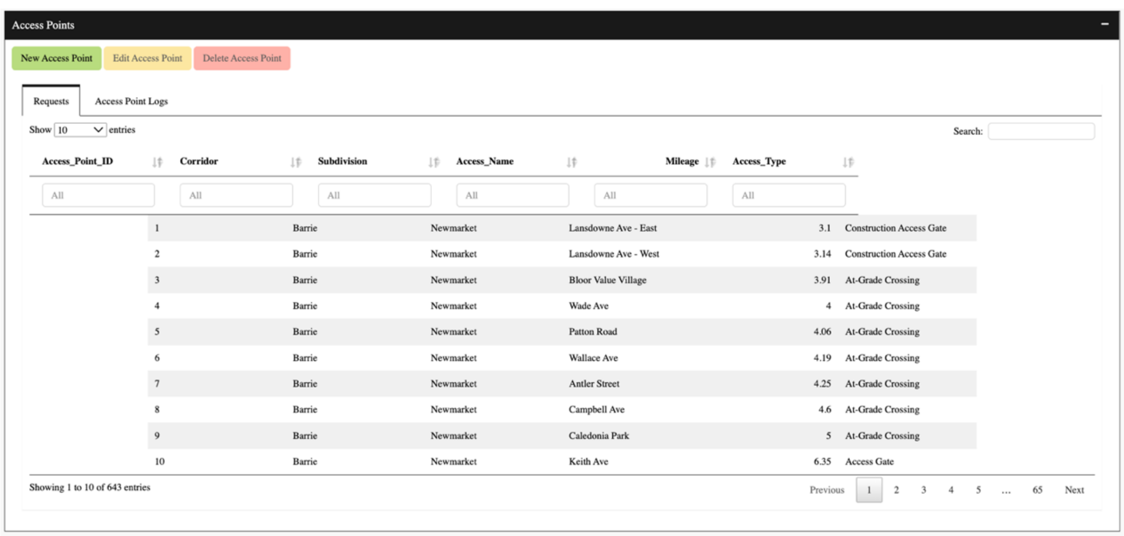


Note: If you want to create a new project or edit an existing project, see [Working with Projects](#).

Viewing Access Points and Logs

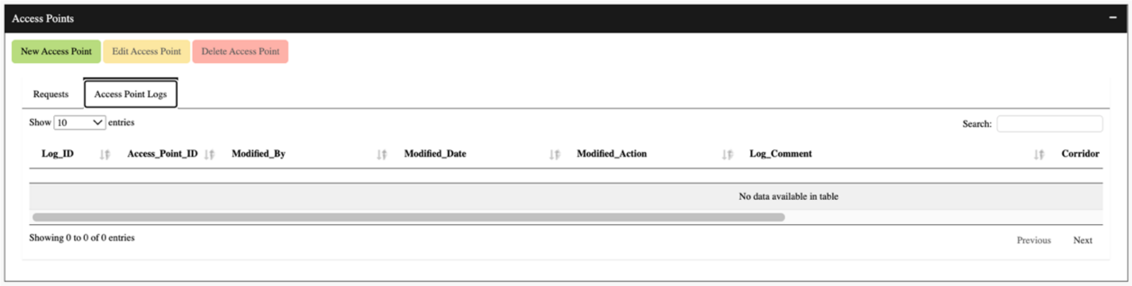
To view a list of all the access points as well as access point logs:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Access Points section to expand it if needed. A list of access points appears.



3. You can sort and filter this list and you can use the search box to locate access points.

4. Click the Access Point Logs tab to view a list of instances where a user made a change to an access point.

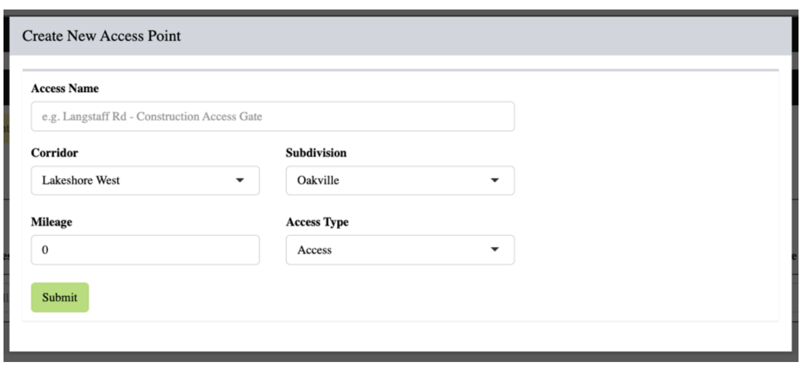


Creating a New Access Point

You must have the RCAC role or above to create a new access point.

To create a new access point:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Access Points section to expand it if needed. A list of access points appears.
3. Click the New Access Point button. The Create New Access Point pop-up appears.



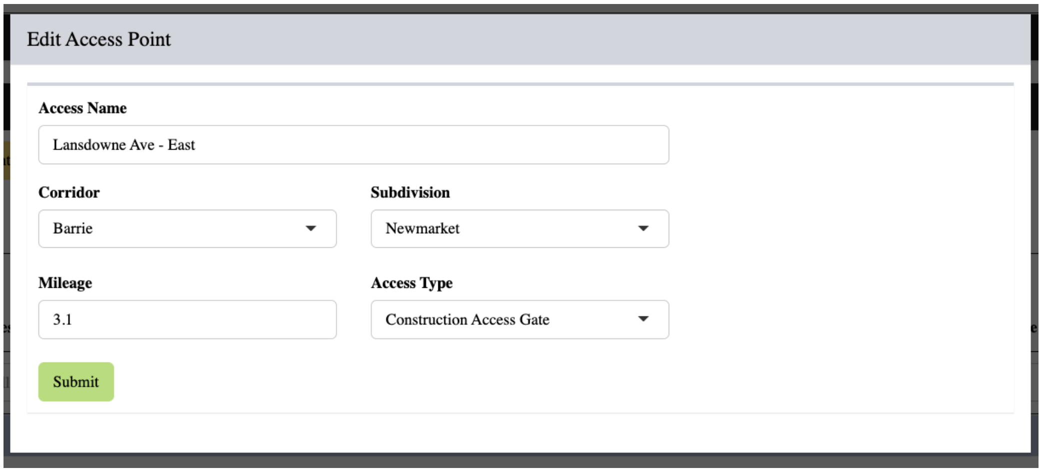
4. Complete the fields:
   - Access Name
   - Corridor
   - Subdivision
   - Mileage
   - Access Type
5. Click the Submit button. The new access point is created.

Editing an Access Point

To edit an access point:

1. On the main menu, click Records. The Records page appears.

2. Click the plus (+) button on the Access Points section to expand it if needed. A list of access points appears.
3. Click on the access point that you want to edit.
4. Click the Edit Access Point button. The Edit Access Point pop-up appears.

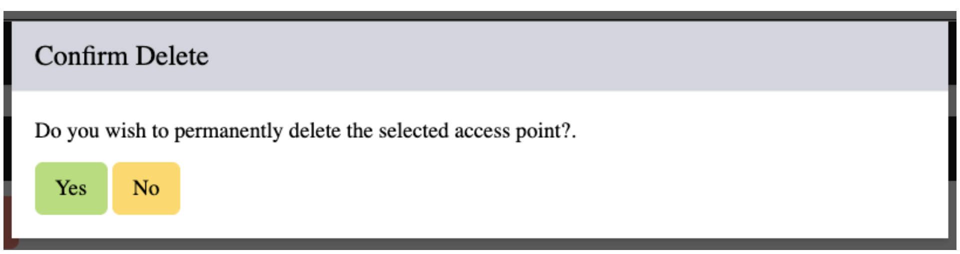


5. Edit the fields as needed.
6. Click the Submit button. Your changes are saved to the access point.

Deleting an Access Point

To delete an access point:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Access Points section to expand it if needed. A list of access points appears.
3. Click on the access point that you want to delete.
4. Click the Delete Access Point button. The Confirm Delete pop-up appears.



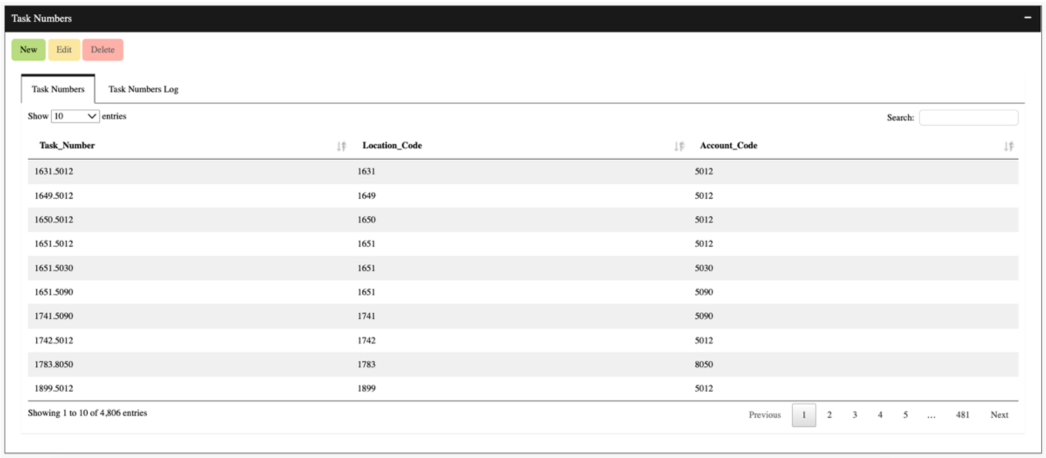
5. Click the Yes button to delete the access point.

Viewing Task Numbers and Logs

To view a list of task numbers as well as task number logs:

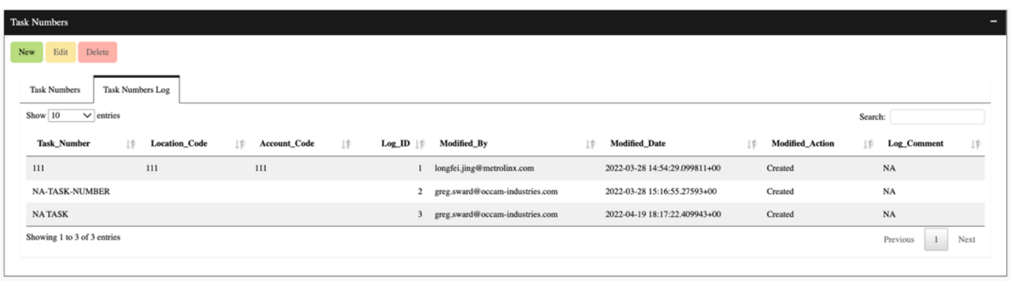
1. On the main menu, click Records. The Records page appears.

2. Click the plus (+) button on the Task Numbers section to expand it if needed. A list of task numbers appears.



Task_Number	Location_Code	Account_Code
1631.5012	1631	5012
1649.5012	1649	5012
1650.5012	1650	5012
1651.5012	1651	5012
1651.5030	1651	5030
1651.5090	1651	5090
1741.5090	1741	5090
1742.5012	1742	5012
1783.8050	1783	8050
1899.5012	1899	5012

3. You can sort and filter this list and you can use the search box to locate task numbers.
4. Click the Task Number Logs tab to view a list of instances where a user made a change to a task number.

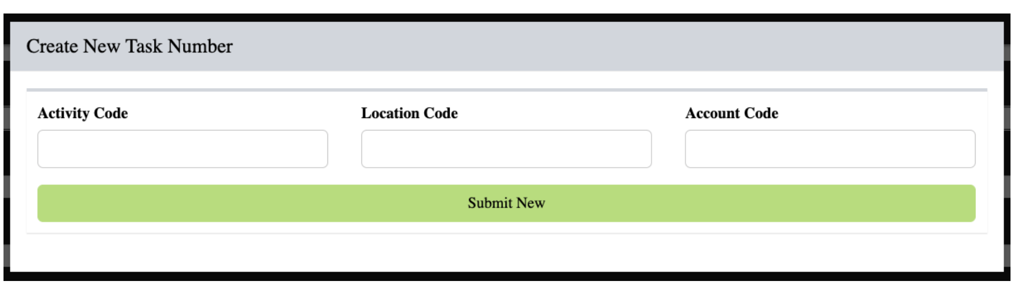


Task_Number	Location_Code	Account_Code	Log_ID	Modified_By	Modified_Date	Modified_Action	Log_Comment
111	111	111	1	longfei.jing@metrolinx.com	2022-03-28 14:54:29.099811+00	Created	NA
NA-TASK-NUMBER			2	greg.sward@occam-industries.com	2022-03-28 15:16:55.27593+00	Created	NA
NA TASK			3	greg.sward@occam-industries.com	2022-04-19 18:17:22.409943+00	Created	NA

Add a Task Number

To add a task number:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Task Numbers section to expand it if needed. A list of task numbers appears.
3. Click the New button. The Create New Task Number pop-up appears.

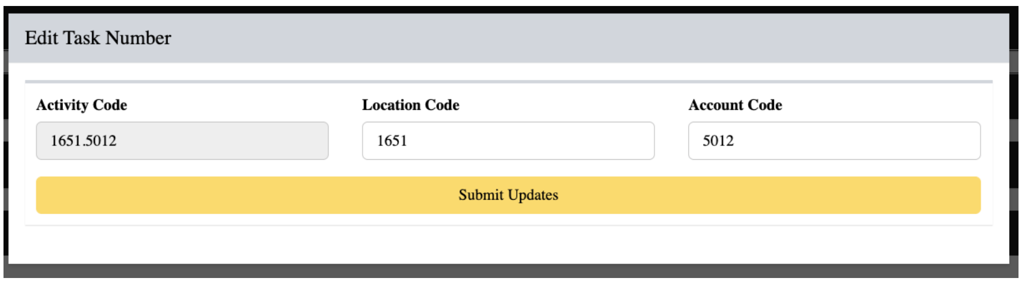


4. Complete the fields:
    - Activity Code
    - Location Code
    - Account Code
5. Click the Submit New button to save the new task number.

Edit a Task Number

To edit a task number:

1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Task Numbers section to expand it if needed. A list of task numbers appears.
3. Click on the task number you want to edit.
4. Click the Edit button. The Edit Task Number pop-up appears.



5. Edit the fields as needed.
6. Click the Submit Updates button. Your changes are saved to the task number.

Delete a Task Number

To delete a task number:

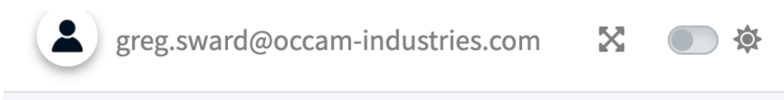
1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Task Numbers section to expand it if needed. A list of task numbers appears.
3. Click on the task number you want to delete.
4. Click the Delete button. The Confirm Delete pop-up appears.

5. Click the Yes button to delete the task number.

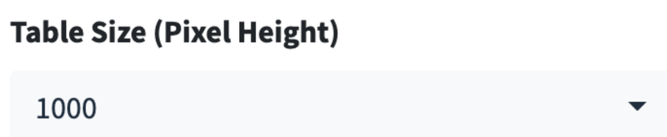
Analyzing Work Event Requests

Project Delivery Teams must be able to review newly submitted work event requests by date and by corridor, most commonly on a week-by-week basis. NAPT makes it easy to extract and analyze work event requests in Excel. Below are some guidelines to help with the review process.

1. The Work Event Report is a big table containing a lot of fields. Some features that can help in setting up the best view for the WER:
   I. Day/Night mode to reduce eye strain. The toggle is located at the top right of the screen.
   II. Full screen view and minimizing the sidebar to help further focus the page on the table.

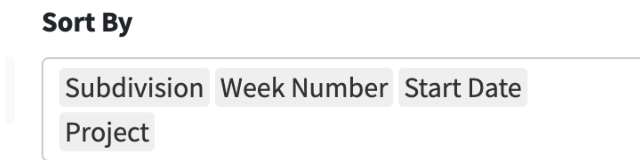


   III. Choosing a table size that's appropriate for your monitor. *Note: if you notice that the table doesn't quite fit the screen, you may see the table move up and down slightly. Your browser is trying to optimize the placement. You can resolve this be resizing your window or choosing a different table size or simply scrolling so that you can see the table header fully.*



   IV. Choose the right view. Currently, you can choose between 'Standard' and 'Full' views which correspond to different column selections. If you have a preferred arrangement of columns, please let us know and we can add to the list of options.

   V. Choose the right sorting. You can sort by multiple fields. For example, if you want to group records by Project and then Start Date, you would select 'Project', 'Start Date'. If you wanted to group by 'Start Date' and then 'Project', you would select 'Start Date', 'Project'.

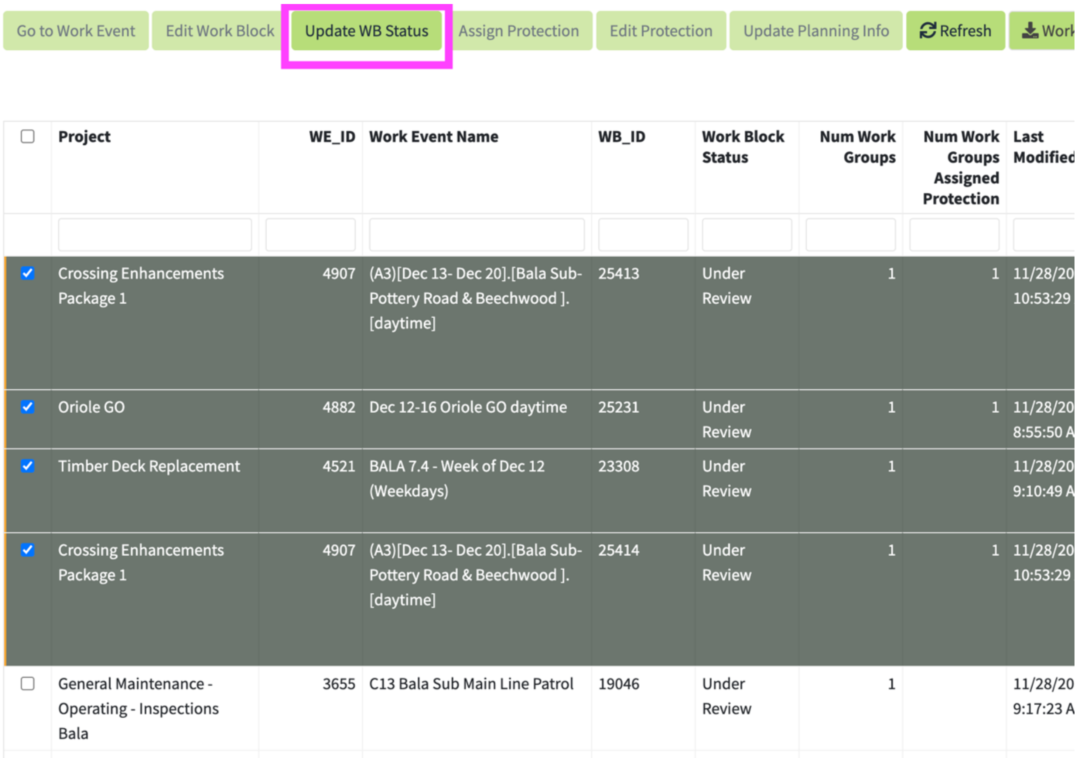


VI. Be specific in terms of Corridor, Date Range, and Status to narrow your results.

2. NAPT 4.0 contains several enhancements to the query logic to significantly improve processing time. Note: you must re-run the search query whenever you change an input for it to take effect.

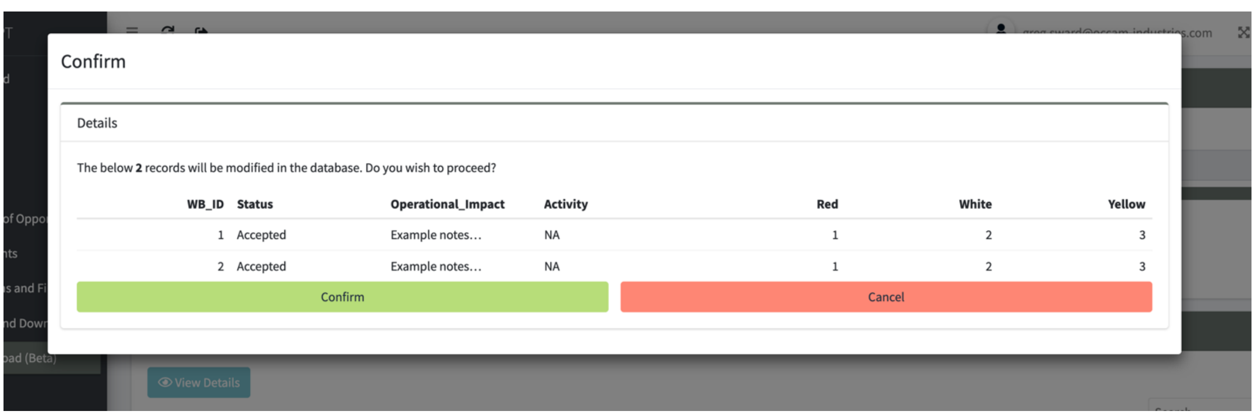
3. The table itself has migrated to a new library which offers some improvements such as:
   I. Resizable columns,
   II. Improved column-wise searching
   III. Mid-column freezing for better horizontal scrolling.
   IV. Fixed headers when scrolling so you don't get 'lost' when navigating through middle of the table.

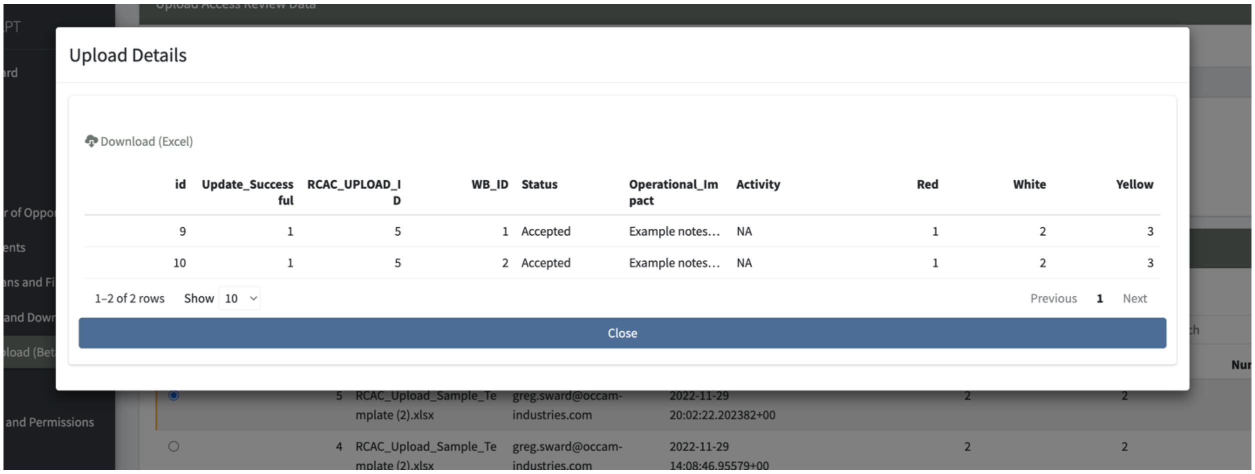
4. It is also much easier to edit records from the table in NAPT 4.0.
   I. After editing a record(s) the selected records and position in the table is preserved.
   II. We added a new layer of proxy-objects to drastically improve the processing time it takes to update a record from the table and update the table data.
   III. When updating a work block status, you can select up to 50 work blocks at once and apply the status updates to all of them. Other types of edits must be done individually, but these should still be overall much faster.


Go to Work Event
Edit Work Block
Update WB Status
Assign Protection
Edit Protection
Update Planning Info
Refresh
Work
Project
WE_ID
Work Event Name
WB_ID
Work Block Status
Num Work Groups
Num Work Groups Assigned Protection
Last Modified
Crossing Enhancements Package 1
4907
(A3)[Dec 13- Dec 20].[Bala Sub- Pottery Road & Beechwood]. [daytime]
25413
Under Review
1
1
11/28/20
10:53:29
Oriole GO
4882
Dec 12-16 Oriole GO daytime
25231
Under Review
1
1
11/28/20
8:55:50 A
Timber Deck Replacement
4521
BALA 7.4 - Week of Dec 12 (Weekdays)
23308
Under Review
1
11/28/20
9:10:49 A
Crossing Enhancements Package 1
4907
(A3)[Dec 13- Dec 20].[Bala Sub- Pottery Road & Beechwood]. [daytime]
25414
Under Review
1
1
11/28/20
10:53:29
General Maintenance - Operating - Inspections Bala
3655
C13 Bala Sub Main Line Patrol
19046
Under Review
1
11/28/20
9:17:23 A

RCAC Upload (Beta)

1. New feature that allows planners to upload certain fields of data back into the NAPT database.
2. Download a sample template that shows which fields must be included in the upload. Note: When uploading, records, you must include a value for each field. Blank values will be flagged in validation. Instead of a blank value, you should use "NA" or -1.
3. After uploading the sample template, you will be shown the records that are about to be modified in the system.
4. If there were any issues with the information you submitted, these will be messaged back to you.
5. There is a cap at 3000 records submitted at a given time.
6. If submitting a large number of records, please do not do so at peak hours to minimize the processing impact on other users.
7. There is a log of batch uploads. You can view the details of any previous batch upload. You can also download the details as an spreadsheet.
8. The required fields for upload are: 'WB_ID', 'Status', 'Activity', 'Operational Impact', 'Red', 'White', 'Yellow'.
9. These fields can be lifted from the WER report export.
10. We can add more fields over time. Some fields present certain ambiguities. For example, if a Work Block has limits of 1-10, and a work group at 2-4 and another at 7-9. If the work block limits are changes to 5-10, how to do handle that first work group? It is possible to make these types of modifications, but at a minimum it would require working from a Work Group-based report rather than the WER which is a Work Block based report.




Upload Details
Download (Excel)
id Update_Successful RCAC_UPLOAD_ID WB_ID Status Operational_Impact Activity Red White Yellow
9 1 5 1 Accepted Example notes… NA 1 2 3
10 1 5 2 Accepted Example notes… NA 1 2 3
1–2 of 2 rows Show 10
Previous 1 Next
Close
and Permissions
5 RCAC_Upload_Sample_Template (2).xlsx greg.sward@occam-industries.com 2022-11-29 20:02:22.202382+00 2 2
4 RCAC_Upload_Sample_Template (2).xlsx greg.sward@occam-industries.com 2022-11-29 14:08:46.95579+00 2 2

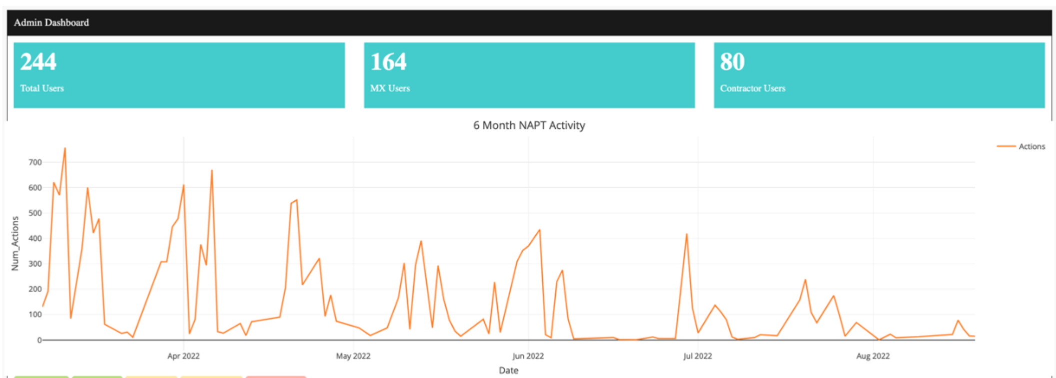
Admin Tasks (NEW)

PERMISSION NEEDED: NAPT admins only.

View the Admin Dashboard

To view the admin dashboard:

1. From the main menu, click Admin. The admin dashboard appears at the top of the next page.



2. Along the top, you can see the number of total users, the number of Metrolinx users, and the number of contractor users.
3. The graph shows the number of actions taken by users on the days the chart covers (which are shown on the Y axis).
4. You can take the following actions on the graph:

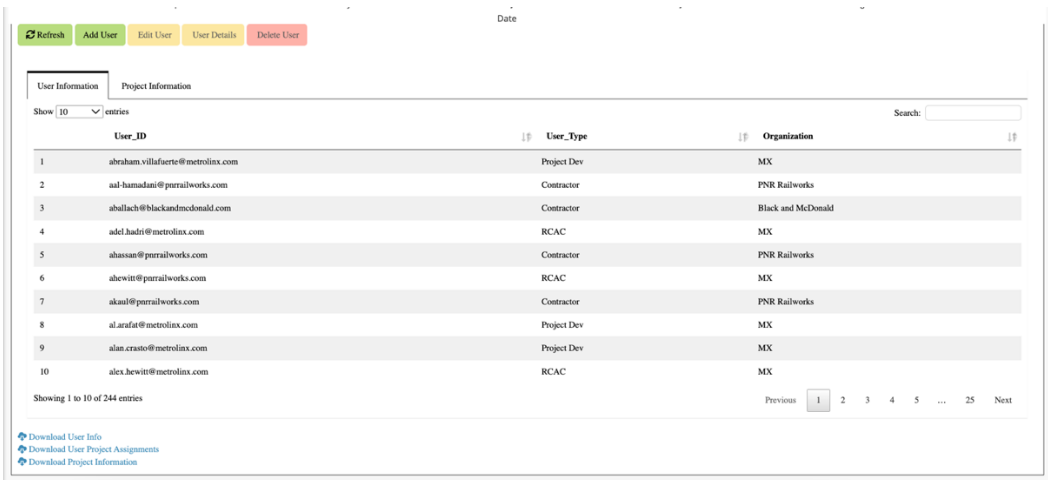
- Download Plot as PNG: Click the Download Plot as PNG button at the top right of the graph to download an image of the graph.
- Zoom: Click and drag to select a section of the graph to zoom in on.
- Pan: Click and drag on the graph to pan to the right or left.
- Zoom In: Click and drag along the Y axis to select a section to zoom in on or click the Zoom In button at the top right of the graph.
- Zoom Out: Click the Zoom Out button at the top right of the graph to zoom out on the graph.
- Autoscale: Click the Autoscale button at the top right of the graph to automatically scale the graph to show all entries.
- Reset Axes: Click the Reset Axes button at the top right of the graph to reset the graph after you've made changes to the view.
- Show Closest Data on Hover: Click this button at the top right of the graph to show the closet data in a label when you hover on a spot on the graph.
- Compare Data on Hover: Click this button at the top right of the graph to show the number of actions and date when you hover at a spot on the graph.

Managing Users and User Permissions

You can use this page to add or delete NAPT users, edit user permissions, and see information about individual NAPT user sessions.

To see the users:

1. On the main menu, click Admin. The admin page appears.
2. Scroll down to the list of users. There are a set of buttons that allow you to act on user profiles.

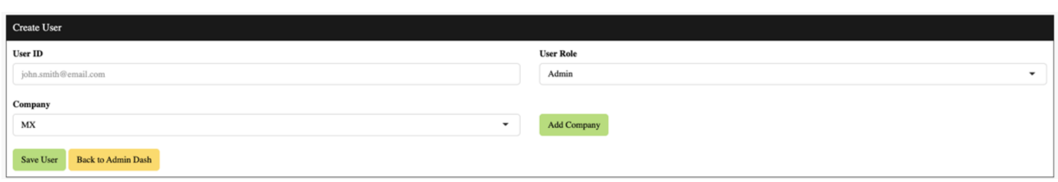


Adding a User

In addition to adding a user in NAPT, you will also need to add them to the Cognito User Pool, because AWS Cognito is used for authentication. The user will not be able to log in to NAPT if they are not also in the Cognito User Pool.

To add a new user:

1. In the user profiles section of the admin page, click the Add User button. The Create User page appears.



2. Enter the user's work email address as the User ID.
3. Select the appropriate User Role. The options are:

- Admin
- Long-Term Planner
- USRC
- RCAC
- Project Dev

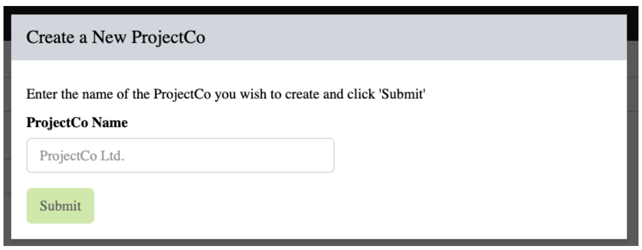
4. Select the user's company. If the user's company isn't included in the drop-down list, you'll need to add the company using the Add Company button. See [Adding a User's Company](#) for more information.
5. Click the Save User button to save the new user.

Adding a User's Company

If the company is not yet in NAPT, you can add it.

To add a user's company:

2. On the Create User page, click the Add Company button.

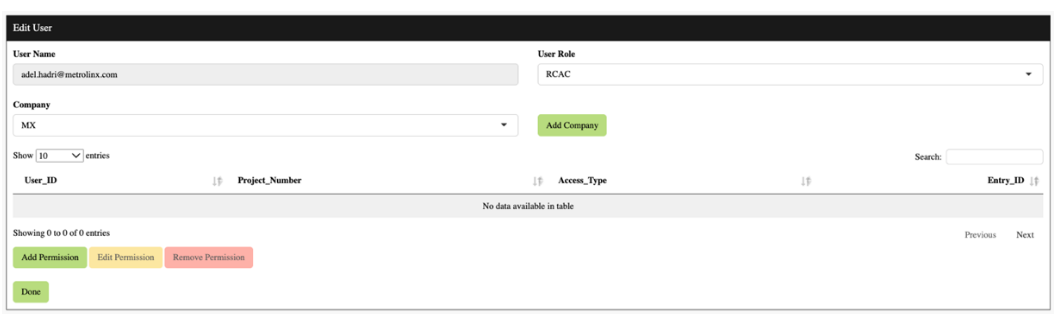


3. Enter the company name.
4. Click the Submit button. The company is added, and you can now assign users to it.

Editing a User Profile

To edit a user profile:

1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to edit and click on it. You may want to use the search function to find the user profile quickly.
3. With the user profile selected, click the Edit User button. The Edit User page appears.

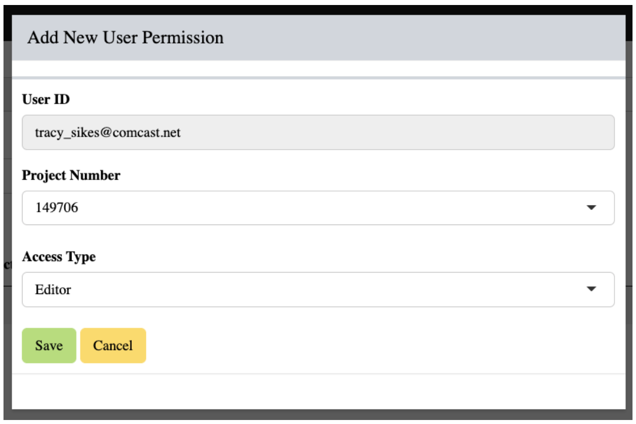


4. Make the edits you need to the user's profile.
5. Click the Done button. The changes you made are saved.

Adding Permissions for a User

To add permissions to projects for a user:

1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to edit and click on it. You may want to use the search function to find the user profile quickly.
3. With the user profile selected, click the Edit User button. The Edit User page appears.
4. Click the Add Permission button. The Add New User Permission pop-up appears.

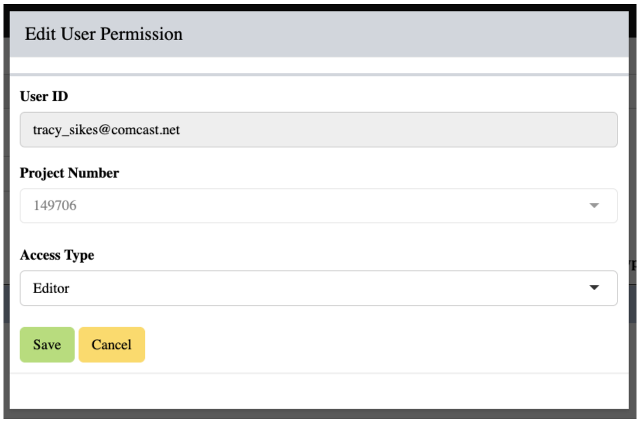


5. Select the Project Number from the drop-down list.
6. Select the Access Type from the drop-down list. The options are:
   - Editor
   - Review
7. Click the Save button. The user's permissions are saved.

Editing Permissions for a User

To edit permissions to projects for a user:

1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to edit and click on it. You may want to use the search function to find the user profile quickly.
3. With the user profile selected, click the Edit User button. The Edit User page appears.
4. Click the permission you want to change in the list.
5. Click the Edit Permission button. The Edit User Permission pop-up appears.

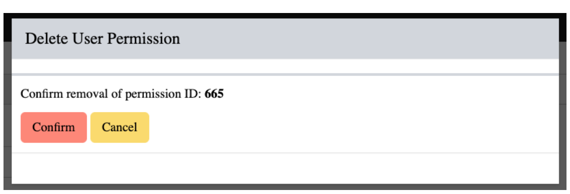


6. Select the Project Number from the drop-down list.
7. Select the Access Type from the drop-down list. The options are:
   - Editor
   - Review
8. Click the Save button. The user's permissions are updated.

Deleting Permissions for a User

To delete permissions to projects for a user:

1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to edit and click on it. You may want to use the search function to find the user profile quickly.
3. With the user profile selected, click the Edit User button. The Edit User page appears.
4. Click the permission you want to delete in the list.
5. Click the Remove Permission button. The Delete User Permission pop-up appears.



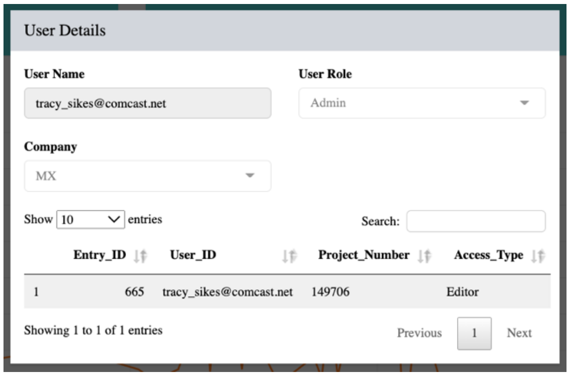
6. Click the Confirm button to finalize the permission deletion.

View a User's Details

To view a user's profiles:

1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to edit and click on it. You may want to use the search function to find the user profile quickly.

3. With the user profile selected, click the User Details button. The User Details pop-up appears.



4. When you are finished reviewing the user's information, click off the pop-up and it will disappear.

Download User Info

To download user information in a spreadsheet:

1. On the main menu, click Admin. The admin page opens.
2. Scroll to the bottom of the list of users and click the Download User Info link.
3. A spreadsheet with information about every user in the system downloads to your computer. The spreadsheet includes each user's ID, their permission level, and their company.

Download User Project Assignments

To download user project assignments in a spreadsheet:

1. On the main menu, click Admin. The admin page opens.
2. Scroll to the bottom of the list of users and click the Download User Project Assignments link.
3. A spreadsheet with users and the projects they're assigned to downloads to your computer. The spreadsheet includes each user's ID, their permission level, their company, and each project the user is assigned to. If a user is assigned to multiple projects, they'll have multiple entries in the spreadsheet (one entry per project).

Download Project Information

To download project information in a spreadsheet:

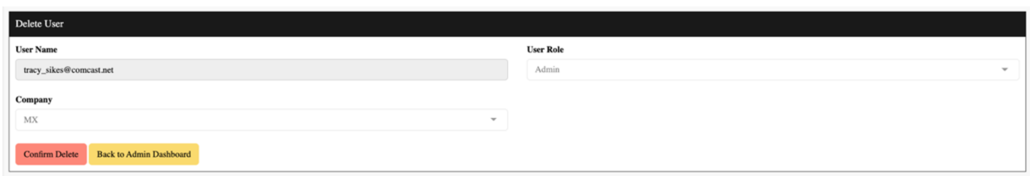
1. On the main menu, click Admin. The admin page opens.
2. Scroll to the bottom of the list of users and click the Download Project Information link.
3. A spreadsheet with information about all of the projects in the system downloads to your computer. The spreadsheet includes the project number,

the project name, the status, the contract type, the user ID for a user assigned to the project, the user's permission level, the user's company, and the user's access type (editor or review) for the project. Each project will contain multiple lines, one for each user assigned to the project.

Deleting a User

To delete a user:

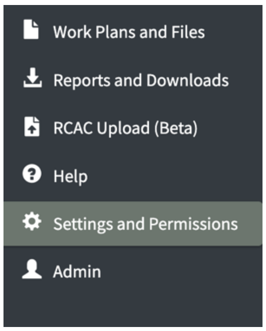
1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to delete and click on it. You may want to use the search function to find the user profile quickly.
3. With the user profile selected, click the Delete User button. The Delete User pop-up appears.



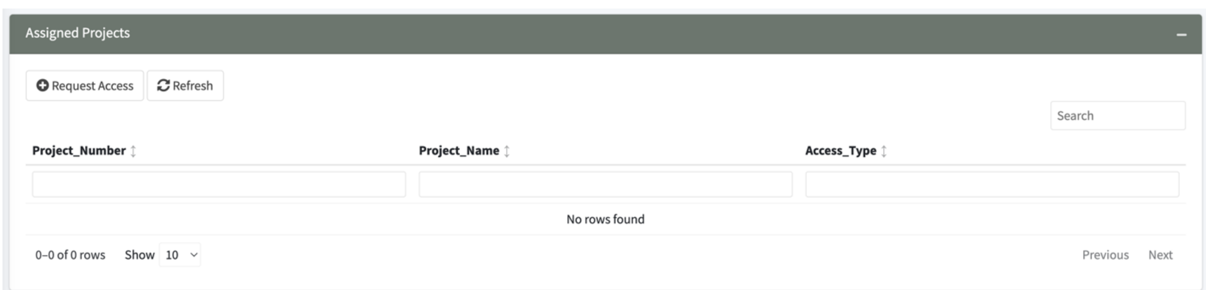
4. Click the Confirm Delete button. A pop-up appears to confirm the user has been deleted.

Project Administrator (NEW)

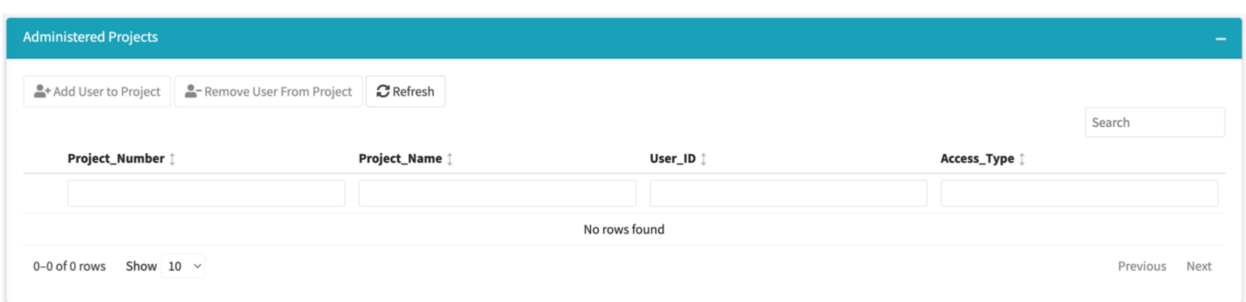
1. A new project-level role has been created, the 'Project Admin'.
2. Project Admins can add or remove users from the projects that they administer.
3. A project can have multiple Project Admins.
4. New 'Settings' Tab. Users can see their project permissions and administer projects.



5. Assigned Projects box in the Settings tab shows the user's current project permissions.



6. Click 'Request Access' to request access to a project.
7. Administered projects (if any) are shown in the 'Administered Projects' box. The table shows the users assigned to each project. The 'Add' and 'Remove' buttons can be used to manage which users have access to a project.



8. Users with access to a project are also listed in the 'Project' tab, in the 'Project Users' box which is located under the 'Contractor Contact Information' box.