

# NAPT USER GUIDE



VERSION 4.0

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## **For Additional Support**

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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](mailto:NAPT.Training@metrolinx.com).

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## Introduction

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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?  |
|--|---|
| <b>Contractors and external third parties</b>            | To submit requests for access to rail corridors along with associated work plans and information              |
| <b>Metrolinx Project Delivery Teams (PDTs)</b>           | To track contractor access and facilitate accurate and complete requests for access                           |
| <b>Metrolinx Rail Corridor Access and Control (RCAC)</b> | 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.

| <b>Role</b>       | <b>Description</b>  |
|-------------------|---|
| 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**

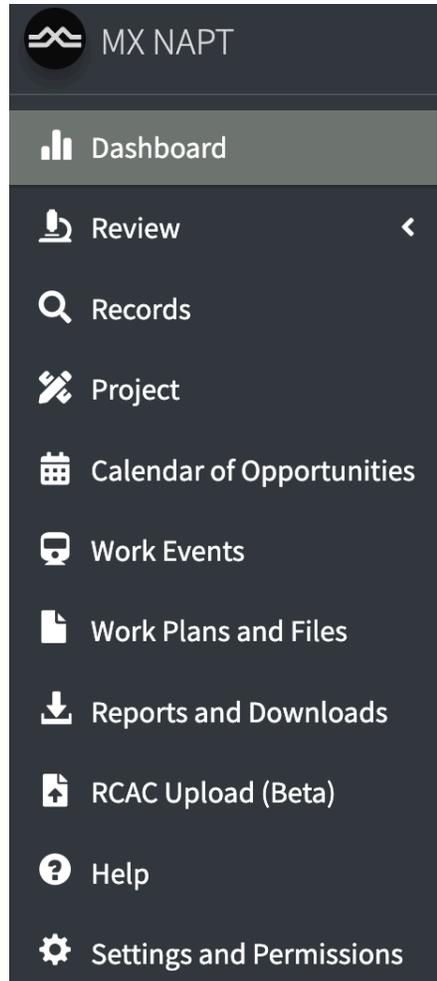
The time in NAPT is +4 hours from Toronto Eastern time.

## Navigating in NAPT

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### 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.

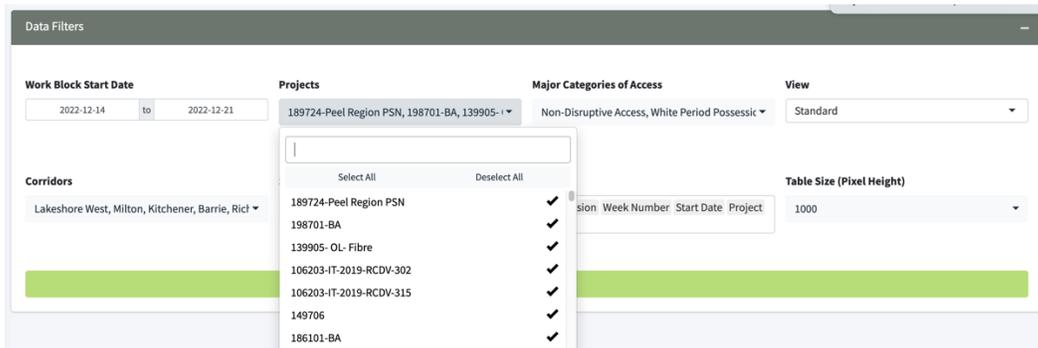


## Filtering Information (NEW)

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

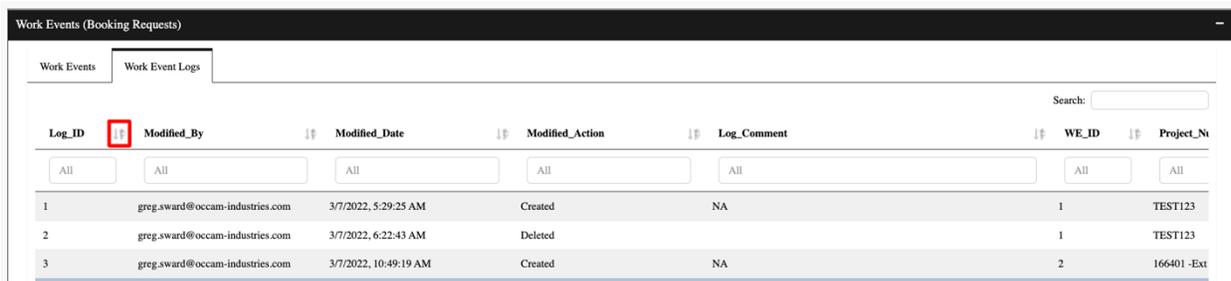
- Begin typing the filter phrase. As you type, the list will change to only include entries that match what you've typed. When you see the entry you want, click on it.

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.



The screenshot shows the 'Work Events (Booking Requests)' application interface. It features a tabbed interface with 'Work Events' and 'Work Event Logs' tabs. A search bar is located at the top right. Below the tabs is a table with the following columns: Log\_ID, Modified\_By, Modified\_Date, Modified\_Action, Log\_Comment, WE\_ID, and Project\_N. Each column header has a small icon of two arrows (one pointing up, one pointing down) indicating sorting options. The 'Log\_ID' column header has a red box around the sorting icon. Below the table, there are three rows of data:

| Log_ID | Modified_By                     | Modified_Date         | Modified_Action | Log_Comment | WE_ID | Project_N   |
|--------|---------------------------------|-----------------------|-----------------|-------------|-------|-------------|
| 1      | greg.sward@occam-industries.com | 3/7/2022, 5:29:25 AM  | Created         | NA          | 1     | TEST123     |
| 2      | greg.sward@occam-industries.com | 3/7/2022, 6:22:43 AM  | Deleted         |             | 1     | TEST123     |
| 3      | greg.sward@occam-industries.com | 3/7/2022, 10:49:19 AM | Created         | NA          | 2     | 166401 -Ext |

## 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

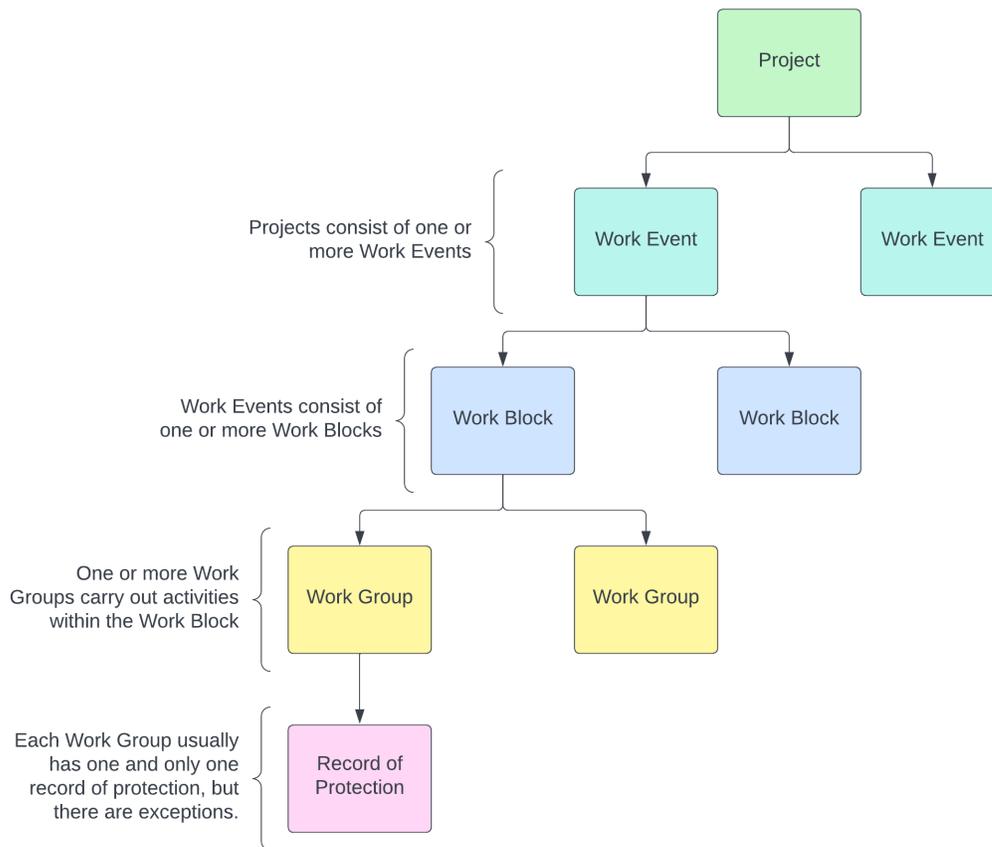
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*PERMISSION NEEDED: All users.*

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.

The screenshot shows a dashboard with three main sections:

- News:** Contains three items:
  - 2022-12-16: NAPT 4.0 release. Notes coming soon. [Metrolinx NAPT 4.0 Release Notes.pdf](#)
  - 2022-12-16: New and Expanded User Guide. [Download Metrolinx NAPT User Guide 4.0.pdf](#)
  - 2022-12-16: New e-learning materials. Coming soon.
- Bug or Issues?:** A text box asking users to report technical issues to [NAPT.training@metrolinx.com](mailto:NAPT.training@metrolinx.com).
- Upcoming Calendar Items - Next 100 Days:** A table with columns: CAL\_ID, Name, Type, Corridor, Start\_Date, Start\_Time, End\_Date, End\_Time, Notes. It lists several 50% and 20% discount events for the Lakeshore West corridor.
- Activity Feed:** A section for viewing project activity.

## Viewing Your Activity Feed

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

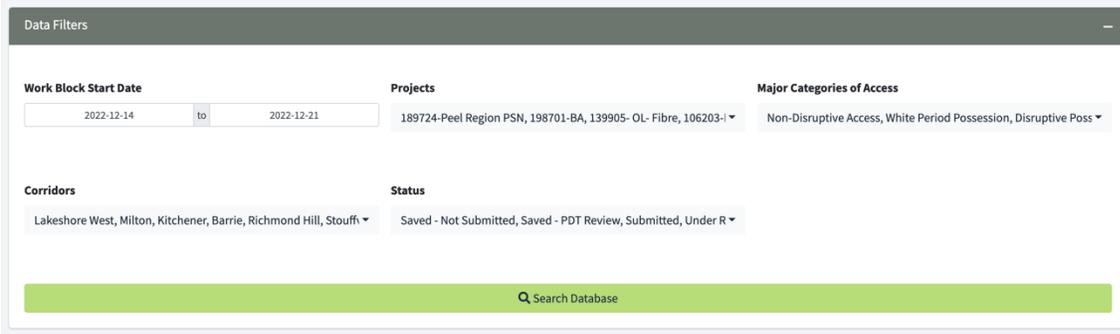
The screenshot shows the 'Activity Feed' interface with the following components:

- Activity Range:** Date range from 2022-12-07 to 2022-12-14 with an 'Update Data' button.
- Table Columns:** A dropdown menu set to 'Condensed' and a 'Show All' button.
- Table:** A table with columns: Activity\_ID, Project\_Number, WE\_ID, Date, Action, Email, Comment, Field, Original\_Value, New\_Value. It displays three activity records.

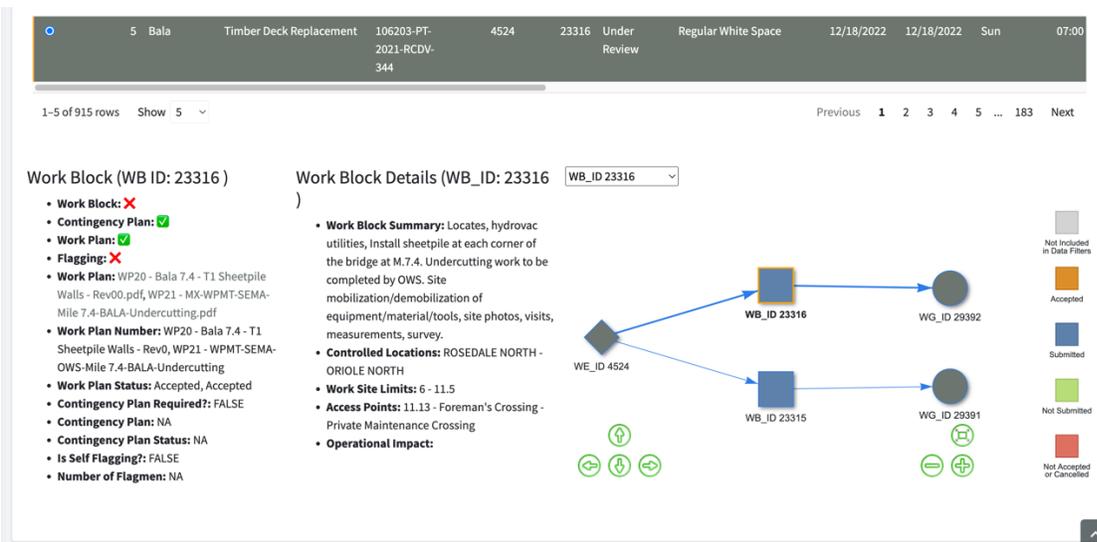
| Activity_ID | Project_Number       | WE_ID | Date                    | Action                   | Email                     | Comment | Field           | Original_Value | New_Value |
|-------------|----------------------|-------|-------------------------|--------------------------|---------------------------|---------|-----------------|----------------|-----------|
| 114724      | 159710               | 67    | 12/14/2022, 12:00:37 PM | Work Block Status Update | komal.ahmed@metrolinx.com |         | NA              | NA             | NA        |
| 114723      | 189724-Toronto Hydro | 5134  | 12/14/2022, 11:37:57 AM | Edited Flagging Record   | komal.ahmed@metrolinx.com | Other   | Protection_Type | Rule 842       | Track     |
| 114722      | 189724-Toronto Hydro | 5134  | 12/14/2022, 11:35:44 AM | Edited Flagging Record   | komal.ahmed@metrolinx.com | Other   | Protection_Type | Rule 842       | Track     |

## 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.

Work Block (WB ID: 4166 )

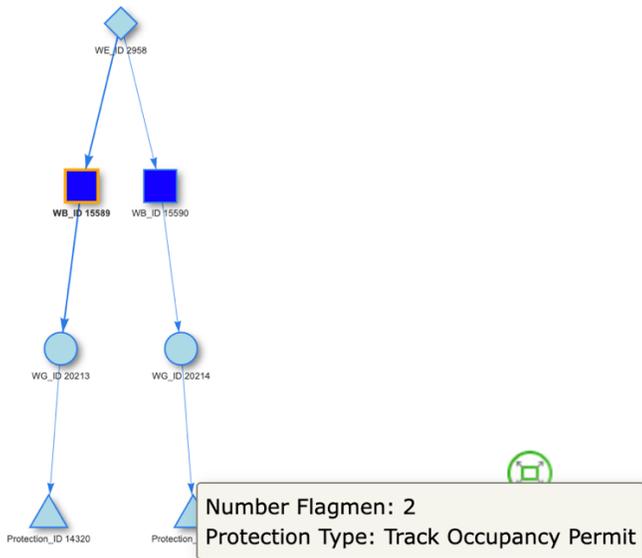
- Work Block: ✗
- Contingency Plan: ✔
- Work Plan: ✔
- Flagging: ✗
- Work Plan: [LSE-Practice.pdf](#), [LSE-Practice.pdf](#)
- Work Plan Number: .
- Work Plan Status: Accepted, Accepted
- Contingency Plan Required?: FALSE
- Contingency Plan: NA
- Contingency Plan Status: NA
- Is Self Flagging?: FALSE, FALSE
- Number of Flagmen: NA

Work Block Details (WB\_ID: 4166 )

- Work Block Summary:
- Controlled Locations: DANFORTH - CHERRY STREET
- Work Site Limits: 331.2 - 329.23
- Access Points: 331.58 - Thackery St - Access Gate
- Operational Impact:

WB\_ID 4166 ▾

- 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.



## 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'.

| Work Event Report (Non-USRC Work Blocks)  |  |       |  |       |                   |                 |                                     |                         |     |             |                      |
|---|--|-------|--|-------|-------------------|-----------------|-------------------------------------|-------------------------|-----|-------------|----------------------|
| <input type="button" value="Go to Work Event"/> <input type="button" value="Edit Work Block"/> <input type="button" value="Update WB Status"/> <input type="button" value="Assign Protection"/> <input type="button" value="Edit Protection"/> <input type="button" value="Update Planning Info"/> <input type="button" value="Refresh"/> <input type="button" value="Work Event Table"/> <input type="button" value="Work Group Details"/> |  |       |  |       |                   |                 |                                     |                         |     |             |                      |
|   |  |       |  |       |                   |                 |                                     |                         |     |             | Search               |
| <input type="checkbox"/>  | Project  | WE_ID | Work Event Name  | WB_ID | Work Block Status | Num Work Groups | Num Work Groups Assigned Protection | Last Modified           | Sub | Subdivision | Controlled Locations |
| <input type="checkbox"/>  | Willowbrook Rail Maintenance Facility and Outposts | 3629  | Monthly Wayside Inspection- Milton- Dec. 20-Days*                                  | 18949 | Under Review      | 1               | 1                                   | 10/17/2022, 11:59:49 AM | 12  | Galt        | STRACHAN - MILTON WI |
| <input type="checkbox"/>  | Willowbrook Rail Maintenance Facility and Outposts | 4174  | Septic Tank Pump Out Nov. 22/ Dec 20 2022 Milton Layover 7374 Fifth Ln. - Dayshift | 21608 | Under Review      | 1               | 1                                   | 10/31/2022, 12:37:31 PM | 12  | Galt        | STRACHAN - MILTON WI |

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  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  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.



Contractor Contact Information

|  |  |
|--|--|
| Primary Contractor Contact & Company<br><input style="width: 95%;" type="text"/> | Secondary Contractor Contact & Company<br><input style="width: 95%;" type="text"/> |
| Primary Contact Phone<br><input style="width: 95%;" type="text"/>                | Secondary Contact Phone<br><input style="width: 95%;" type="text"/>                |
| Primary Contact Email<br><input style="width: 95%;" type="text"/>                | Secondary Contact Email<br><input style="width: 95%;" type="text"/>                |

## Work Event Requests

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*PERMISSION NEEDED: All users.*

### Creating a Work Event Request

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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.
- 

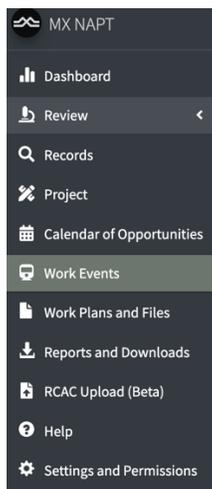
#### **Step 1: Creating a work event record**

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.

The screenshot shows a web form titled "Step 1: Work Event Record". The main section is "Record Details". It contains several input fields and dropdown menus:

- Select Project:** A dropdown menu with the value "189724-Peel Region PSN -- Utilities Early Works (Peel Region F)".
- New or Existing Work Event:** A dropdown menu with the value "New".
- Work Event Name\* (e.g. "[Jan10-14],[location],[daytime/nighttime/allday]"):** An empty text input field.
- Estimated Access Cost @:** A text input field with the value "0".
- Category of Access\* @:** A dropdown menu with the value "Non-Disruptive Access".
- Subcategory of Access\*:** A dropdown menu with the value "Non-Disruptive Access".
- Corridors\*:** A dropdown menu with the value "Lakeshore West".
- Subdivisions\*:** A dropdown menu with the value "Oakville".
- Start Date\*:** A text input field with the value "2022-12-14".

At the bottom right of the form, there is a green button labeled "Go to Calendar".

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.



**Record Details**

Select Project: 189724-Peel Region PSN -- Utilities Early Works (Peel Region F) | New or Existing Work Event: New

Work Event Name\* (e.g. "[Jan10-14],[location],[daytime/nighttime/allday]"):  | Estimated Access Cost <sup>?</sup>:

Category of Access\* <sup>?</sup>: Non-Disruptive Access | Subcategory of Access\*: Non-Disruptive Access

Corridors\*: Lakeshore West | Subdivisions\*: Oakville | Start Date\*: 2022-12-14

[Go to Calendar](#)

3. Scroll down to the Risk Profile block.

**Risk Profile**

Once the work has started, must it be completed before the track can be returned to service?  Yes  No

Does the work involve commissioning or decommissioning of Track or Signalling equipment?  Yes  No

Does the Work involve decommissioning, disconnecting or will cause any deterioration to the Track Assets?  Yes  No

Does the Work involve any excavation under the track and may pose a risk of track settlement after completion?  Yes  No

Does the work require a continuous full closure greater than 12 hours?  Yes  No

Does the work require a "Temporary Slow Order" (TSO) upon completion? If known, please specify speed and duration.  Yes  No

Slow Order Speed (MPH):  | Slow Order Duration (Hours):

Does the work require Rule "103g" after work event completion (if at a public crossing)?  Yes  No

Does the worksite contain two or more of the following disciplines: Track, Signals, Crossings, Platforms?  Yes  No

If the worksite contains two more disciplines, please identify them below. In addition, if you believe that any of the questions above do not accurately portray the risk of works overrunning your allotted work block, describe the reasons below.

Are there any other impacts to train operations?  Yes  No

If yes to above, Other Operational Impacts

NOTE: A Contingency Plan IS NOT required for this work event.

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.

| File ID | File Number | File Name  | Status    | Last Modified        | Type      |
|---------|-------------|--|-----------|----------------------|-----------|
| 10      |             | Davenport Diamond - Corridor Access Request - Week of 03.07.2022.pdf   | Submitted | 2022-02-22T14:54:55Z | Work Plan |
| 40      |             | Davenport Diamond - Corridor Access Request - Week of 03.21.2022.pdf   | Submitted | 2022-03-04T21:07:31Z | Work Plan |
| 32      |             | Davenport Diamond - Corridor Access Request - Week of 03.14.2022 R1.pdf  | Submitted | 2022-02-28T12:57:06Z | Work Plan |
| 47      |             | Davenport Diamond - Corridor Access Request - Week of 03.28.2022 R1.pdf  | Submitted | 2022-03-14T12:55:42Z | Work Plan |
| 64      |             | Davenport Diamond - Corridor Access Request - Week of 03.21.2022 - R1 - Rail Cars Travelling TOP and storage.pdf | Submitted | 2022-03-18T19:23:57Z | Work Plan |

1-5 of 28 rows Show 5

Assigned Work Plans  
Nothing selected

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.

New
Duplicate
Sequence
Edit
Delete/Cancel
Add Work Group/Zone
Update Status

| Work Blocks    |       | Log History |        |            |          |            |          |          |             |            |          |                          |
|----------------|-------|-------------|--------|------------|----------|------------|----------|----------|-------------|------------|----------|--------------------------|
| Project Number | WE ID | WB ID       | Status | Start Date | End Date | Start Time | End Time | Corridor | Subdivision | Mile Start | Mile End | Proposed Protection Type |
|                |       |             |        |            |          |            |          |          |             |            |          |                          |

### 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.

**Step 1: Work Block Information**

Note: Start Date to End Date should be continuous. Option to duplicate Work Blocks after saving for repeating blocks (i.e. Monday night, Tuesday night, etc.)

|   |   |   |   |
|---|---|---|---|
| <b>Start Date</b>                       | <b>End Date</b>                         | <b>Start Time</b> ⓘ   | <b>End Time</b>   |
| <input type="text" value="2022-02-22"/> | <input type="text" value="2022-02-22"/> | <input type="text" value="00"/> <input type="text" value="00"/> | <input type="text" value="00"/> <input type="text" value="00"/> |

|                                     |  |
|-------------------------------------|--|
| <b>Corridor</b>                     | <b>Subdivision</b>                     |
| <input type="text" value="Barrie"/> | <input type="text" value="Newmarket"/> |

Mileage  Signals

|                                |                                 |   |   |
|--------------------------------|---------------------------------|---|---|
| <b>Site Start Mile</b>         | <b>Site End Mile</b>            | <b>Site Starting Signal</b>                   | <b>Site Ending Signal</b>                     |
| <input type="text" value="3"/> | <input type="text" value="63"/> | <input type="text" value="Nothing selected"/> | <input type="text" value="Nothing selected"/> |

**Access Gates (incl. Road Crossings used)**

**New Access Gate** ⓘ

**Summary (scope of work and timelines)**

|  |   |                                   |
|--|---|-----------------------------------|
| <b>Task Number</b> ⓘ                   | <b>Proposed Protection Type</b>                     | <b>Barrier Protection</b> ⓘ       |
| <input type="text" value="1630.3413"/> | <input type="text" value="Track Occupancy Permit"/> | <input type="text" value="None"/> |

**Activity taking place on tracks?** ⓘ  Yes  No

**Impacts to CN or CP?** ⓘ  Yes  No

**Does this scope of work require a hazardous work permit per your workplan?**

Yes  No

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

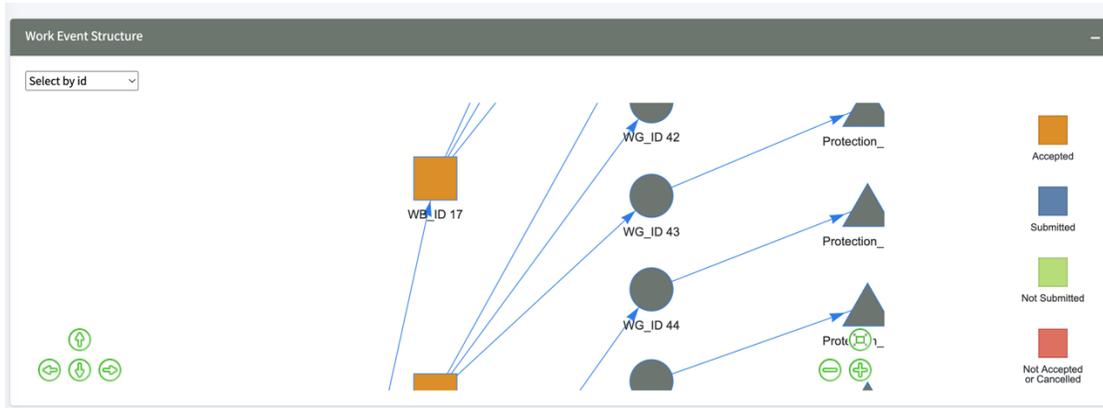
- Separate Protecting Foreman Required for Work Group / Work Zone?
  - Flagging Contractor
  - Self Flagging?: If you plan to manage flagging yourself, click Yes in the Self Flagging? Field and select your contractor from a dropdown list in the Flagging Contractor field. If you don't plan on managing 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.



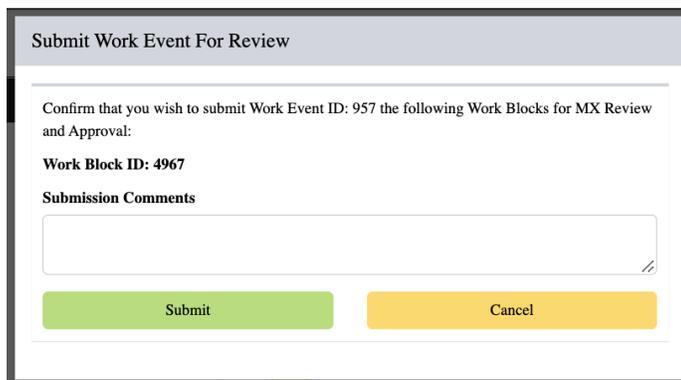
- To select a work block in the diagram, click the drop-down list and select the work block ID or click on the work block in the diagram.
- To zoom in or out from the diagram, click the plus (+) or minus (-) buttons or use the mouse scroll.
- To move the diagram, click the arrow buttons or click and 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.



The screenshot shows a pop-up window titled "Submit Work Event For Review". The window contains the following text: "Confirm that you wish to submit Work Event ID: 957 the following Work Blocks for MX Review and Approval:". Below this, it says "Work Block ID: 4967". There is a section labeled "Submission Comments" with a text input field. At the bottom of the window, there are two buttons: a green "Submit" button and a yellow "Cancel" button.

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.

Work Block Info

- Project Name: Davenport Diamond Rail Grade Separation
- Project #: 149715
- Work Event Name: March 7 - March 11
- WB\_ID: 17
- Date Last Submission/Revision: 2022-02-22 10:19:59
- Scopes of Work: (WG\_ID 40) Soncin [Mar 7 - Mar 11, 2022] - N MSE Walls (Foundry) Clearway [Mar 7 - Mar 11, 2022] - Grading & Drainage (MSE N)
- Block Start Date: 2022-03-07
- Block Time: 06:00 - 17:30
- Task Number: 1806.3413
- Site Supervisor Contact Info: Warren Baun 403-827-2301
- MX Contact Info: Waleed Mikhael 647 221 8280

- Proposed Protection Type: R842
- Number of Work Groups: 1
- Work Site Limits: 3.3 - 5
- Max Time to Clear: 1
- Machinery: (WG\_ID 40) Pickup Truck Loader Packer Triaxel Skidsteer
- Requested Flagging Contractor: (WG\_ID 40) A&B
- Proposed Flagging Resources: (WG\_ID 40) 2
- Seperate Protecting Foreman: (WG\_ID 40) Yes
- Meeting Locations: 5 - Caledonia Park - At-Grade Crossing
- Min Distance from Track (Ft) Workers: 0
- Min Distance from Track (Ft) Machinery: 4

---

Protection Information

**Associated Work Group IDs**

40

**Protection Type**

Rule 842

**Other Protection Type**

Nothing selected

**Protection Start Subdivision**

Newmarket

**Protection Start Mile**

-1

**Protection Start Signal**

Nothing selected

**Protection End Subdivision**

Newmarket

**Protection End Mile**

-1

**Protection End Signal**

Nothing selected

**Three Leg Protection?**

Yes  No

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.

Edit Work Block

**Step 1: Work Block Information**

Note: Start Date to End Date should be continuous. Option to duplicate Work Blocks after saving for repeating blocks (i.e. Monday night, Tuesday night, etc.)

|   |   |   |   |
|---|---|---|---|
| <b>Start Date</b>                       | <b>End Date</b>                         | <b>Start Time</b>   | <b>End Time</b>   |
| <input type="text" value="2022-03-07"/> | <input type="text" value="2022-03-07"/> | <input type="text" value="06"/> <input type="text" value="00"/> | <input type="text" value="17"/> <input type="text" value="30"/> |

**Corridor** **Subdivision**

Mileage  Signals

|                                  |                                |   |   |
|----------------------------------|--------------------------------|---|---|
| <b>Site Start Mile</b>           | <b>Site End Mile</b>           | <b>Site Starting Signal</b>                   | <b>Site Ending Signal</b>                     |
| <input type="text" value="3.3"/> | <input type="text" value="5"/> | <input type="text" value="Nothing selected"/> | <input type="text" value="Nothing selected"/> |

**Access Gates (incl. Road Crossings used)**

**New Access Gate**

**Summary (scope of work and timelines)**

Task Number Proposed Protection Type Barrier Protection

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.

Create a Sequence of Work Blocks

Work Block Sequence Information

Number of days to repeat the Work Block

1

Would you like to replicate any Work Groups associated with this Work Block?

Yes  No

Save Cancel

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.

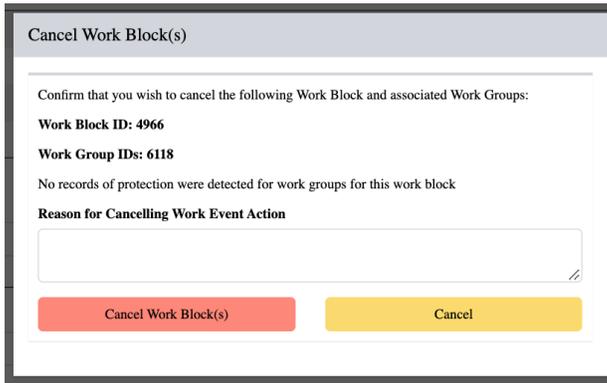
## Delete/Cancel a Work Block

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.

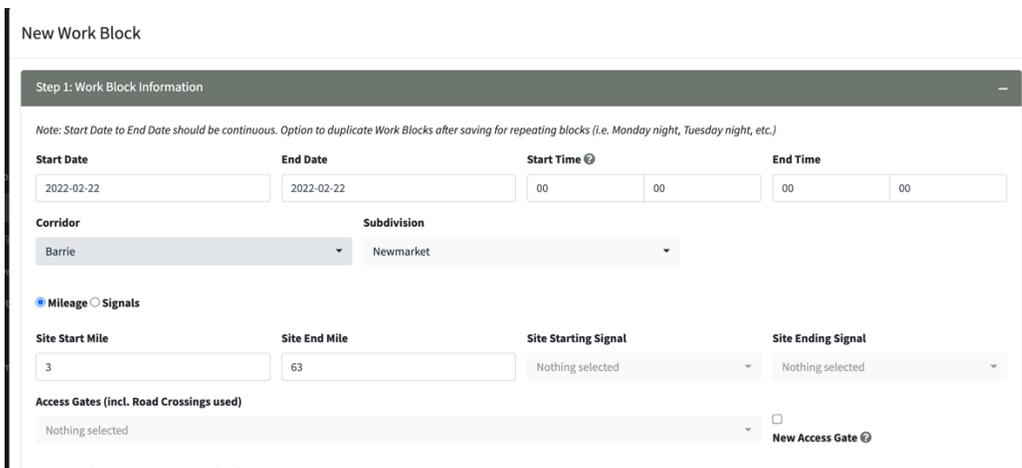


3. Enter the reason for the cancellation in the text box.
4. Click the Cancel Work Block(s) button.

### 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.

Batch Edit - Work Groups (Beta Feature)

Which fields would you like to edit?

**Editable Fields**

- 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 Machinery Ft
- Signal Maintainer Required
- Num Signal Maintainers
- Proposed Num Flagging Resources
- Flagging Resources Includes Separate Protecting Foreman
- Flagging Contractor
- Is Self Flagging
- Scope of Work
- List of Machinery
- Work Plan File ID
- Notes For Flagging Team

Continue Cancel

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

- 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.

Edit Work Group / Work Zone

Work Group / Work Zone Information

Associated Work Blocks (WB\_IDs): 17  
Associated Protection Records (Protection\_IDs): 30

Max # of Workers in Work Group/Zone: 10  
Distance From Track - Workers (ft): 0  
Distance From Track - Machinery (ft): 4

Start Date: 2022-03-07  
End Date: 2022-03-07  
Start Time: 06:00  
End Time: 17:30

Mileage  Signals

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

## Delete a Work Group

To delete a work group:

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

Delete Work Group(s)

Confirm that you wish to delete the following Work Group(s):

Work Group ID: 6118

Reason for Deleting Work Group

Delete Cancel

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

## Monitoring the Status of Requests

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*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



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

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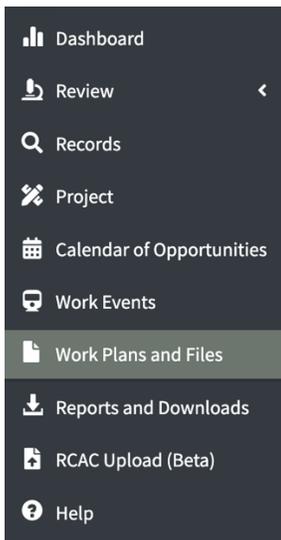
## Working with Work Plans and Files (NEW)

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       |
|---|----------------|---------|-------------|---------------------------------|--------------------------|-----------|------------|-----------|---------------------|
| Barrie Rail Corridor Expansion Contract 1 | 149706         | 193     |             | LSE-Practice.pdf                | <a href="#">Download</a> | Work Plan |            | Accepted  | 2022-05-30 18:16:02 |
| Barrie Rail Corridor Expansion Contract 1 | 149706         | 256     |             | Signature.png                   | <a href="#">Download</a> | Work Plan |            | Submitted | 2022-06-24 14:12:55 |
| Barrie Rail Corridor Expansion Contract 1 | 149706         | 278     |             | LSE- Exit Exam--27Jan.2022.pdf  | <a href="#">Download</a> | Work Plan |            | Submitted | 2022-07-04 17:55:33 |
| Barrie Rail Corridor Expansion Contract 1 | 149706         | 308     |             | LSE-Practice.pdf                | <a href="#">Download</a> | Work Plan |            | Accepted  | 2022-07-29 17:14:39 |
| Barrie Rail Corridor Expansion Contract 2 | 159710         | 71      |             | Borehole WP.pdf                 | <a href="#">Download</a> | Work Plan |            | Submitted | 2022-03-28 16:30:25 |
| Barrie Rail Corridor Expansion Contract 2 | 159710         | 70      |             | WP-004 Pre-Condition Survey.znr | <a href="#">Download</a> | 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.




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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.

| Project Name                              | Project Number | File ID | File Number | File Name                       | Link     | Type      | Type Other | Status    | Last Modified       |
|---|----------------|---------|-------------|---------------------------------|----------|-----------|------------|-----------|---------------------|
| 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-Exam-27jan2022.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 |

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.

**Confirm Action**

Confirm that you wish to delete File ID: 31

**Reason for Delete (Optional)**

**Confirm** **Cancel**

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:

**Work Group Conflict**

Cannot delete the selected file as the file is referenced by the following work group ids: 3494, 3495, 3496, 3497, 3498, 3499, 3500, 3501, 3502, 3503, 3504, 3505, 5208, 5209, 3162, 3163, 3164, 3165, 3166, 3167, 3168, 3169, 3170, 3171, 3172, 3173, 3174, 5210, 5211, 5212, 3180, 3196, 3208, 3211, 3214, 3217, 3224, 3223, 3225, 3226, 3220, 3221, 3222, 3227, 3229, 3230, 3228, 3231, 3457, 3458, 3459, 3460, 3461, 3462, 3463, 3464, 3465, 3466, 3467, 3468, 3469, 3493, 4103, 4104, 4105, 4106, 4107, 4108, 4109, 4110, 3892, 3896, 3898, 3899, 3897, 3900, 3899, 3901, 4689, 4688, 4687, 4686, 4685, 4691, 4716, 4840, 4841, 4842, 4847, 4848, 4870, 4874, 4875, 4876, 4877, 5085, 5087, 5077, 5084, 5086, 5704, 5696, 5698, 5705, 5706, 5708, 5770, 5774, 5776, 5777, 5764, 5935, 5943, 5922, 5933, 5938, 5940, 5942

You need to resolve conflicts before deleting

**OK**

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.

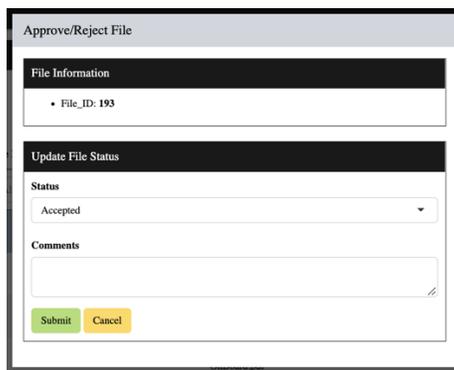
## Updating a Work Plan or File Status

*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.



The screenshot shows a pop-up window titled "Approve/Reject File". It contains two main sections: "File Information" and "Update File Status".

- File Information:** A text field containing "File\_ID: 193".
- Update File Status:** A section with a "Status" dropdown menu currently set to "Accepted", a "Comments" text area, and two buttons: "Submit" (green) and "Cancel" (yellow).

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.



| Work Plans and Files  |                |         |             |                                     |          |           |            |          |                     |
|---|----------------|---------|-------------|-------------------------------------|----------|-----------|------------|----------|---------------------|
| <span>Add New File</span> <span>Delete</span> <span>Review</span> <span>Download</span> |                |         |             |                                     |          |           |            |          |                     |
| Search  |                |         |             |                                     |          |           |            |          |                     |
| Project Name  | Project Number | File ID | File Number | File Name                           | Link     | Type      | Type Other | Status   | Last Modified       |
| <input checked="" type="radio"/> Crossing Enhancements Package 1                        | 198701-BA      |         | 21          | WPM- A2 - Pre-work.pdf              |          | Work Plan |            | Accepted | 2022-02-22 16:43:46 |
| <input type="radio"/> Crossing Enhancements Package 1                                   | 198701-BA      |         | 41          | WPM- A2&A9 - Construction Rev 2.pdf | Download | Work Plan |            | Accepted | 2022-03-07 15:47:45 |
| <input type="radio"/> Crossing Enhancements Package 1                                   | 198701-BA      |         | 44          | WPM - A18 - Commissioning Rev 1.pdf | Download | Work Plan |            | Accepted | 2022-03-11 15:13:15 |
| <input type="radio"/> Crossing Enhancements Package 1                                   | 198701-BA      |         | 22          | WPM- A2 - Commissioning.pdf         | Download | Work Plan |            | Accepted | 2022-02-22 16:44:04 |
| <input type="radio"/> Crossing Enhancements Package 1                                   | 198701-BA      |         | 20          | WPM - A18 - Pre-work.pdf            | Download | Work Plan |            | Accepted | 2022-02-22 16:43:23 |

1-5 of 1614 rows Show 5

Previous 1 2 3 4 5 ... 323 Next

## 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.

The screenshot shows the 'Calendar' interface with the following components:

- Data Range:** 2022-11-30 to 2022-12-10. Navigation buttons for 'Today', '<', and '>' are present.
- View:** A dropdown menu set to 'Month'.
- Corridors:** A dropdown menu set to 'Lakeshore West, Milto'.
- Filters:** A list of checkboxes for 'Major Disruptions', 'Minor Disruptions', 'Platform Closures', 'Disruptive Periods', 'Discount Periods', and 'Blackouts', all of which are checked.
- Search:** A green 'Search' button.
- Work Blocks:** A legend on the left side of the calendar grid:
  - Disruptive Periods (orange)
  - Discount Periods (green)
  - Blackout Dates (black)
- Calendar Grid:** A grid showing dates from Sunday (30) to Sunday (10).
  - November 21 is highlighted with a blue circle.
  - November 25-28 is marked as a blackout period: '[Nov25-28],[BAR],[allday] (WE\_ID: 66 Status: ...)'.
  - November 27 is marked as a disruptive period: '[Nov25-28],[BAR],[allday] (WE\_ID: 66 Status: ...)'.
  - December 2-4 is marked as a disruptive period: 'Sinkhole Remediation Track Lining Dec 2-4 (W...)'.
  - December 4 is marked as a disruptive period: 'Disruptive Period: Micropiles (DP\_ID: 4 Stat...)'.
  - December 10 is marked as a disruptive period: 'Sinkhole Remediation Track Lining Dec 2-4 (W...)'.

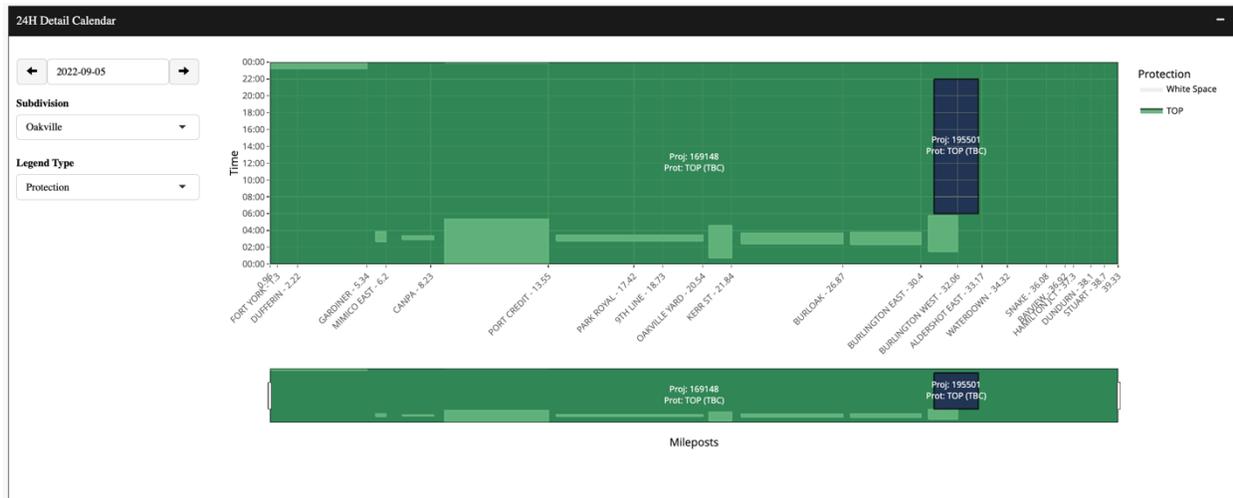
To use the calendar:

- 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:

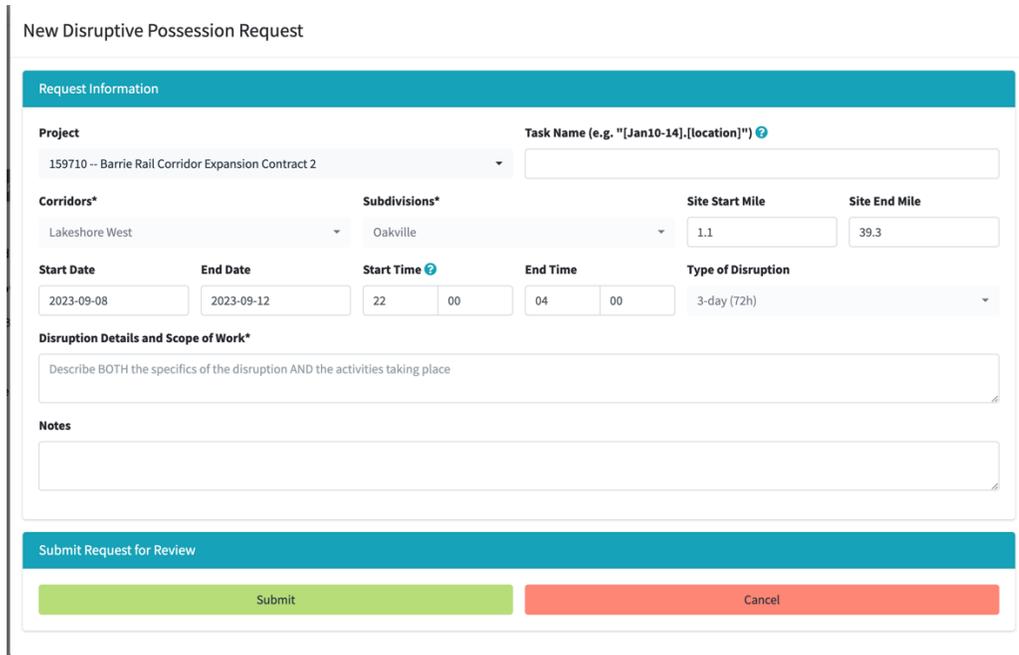
1. On the main menu, click Calendar of Opportunities.
2. Scroll down to the Disruptive Period section.
3. Select the relevant "Open" Disruptive Period.

The screenshot displays the 'Disruptive Periods' section of the application. On the left is a navigation sidebar with 'Calendar of Opportunities' highlighted. The main area has a header 'Disruptive Periods' and a 'New Possession' button. Below this is a date range selector set to '2023-02-10 to 2024-02-10'. A 'Requests' tab is active, showing a table with the following data:

| D_ID | RCAC_D_ID | Corridor       | Subdivision | Mile_Start | Mile_End | Type_of_Disruption | Status | Start_Date | Start_Time | End_Date   | End_Time |
|------|-----------|----------------|-------------|------------|----------|--------------------|--------|------------|------------|------------|----------|
| 1    |           | Lakeshore West | Oakville    | 21.84      | 39.3     | 1-day (28h)        | Open   | 2023-05-07 | 01:00      | 2023-05-08 | 04:00    |
| 2    |           | Lakeshore West | Oakville    | 21.84      | 39.3     | 2-day (54h)        | Open   | 2023-06-02 | 22:00      | 2023-06-05 | 04:00    |
| 3    |           | Lakeshore West | Oakville    | 1.1        | 39.3     | 3-day (72h)        | Open   | 2023-09-08 | 22:00      | 2023-09-12 | 04:00    |
| 4    |           | Lakeshore West | Oakville    | 1.1        | 8.36     | 2-day (54h)        | Open   | 2023-12-08 | 22:00      | 2023-12-11 | 04:00    |
| 5    |           | Lakeshore East | Kingston    | 332.2      | 313.71   | 3-day (72h)        | Open   | 2023-09-08 | 22:00      | 2023-09-12 | 04:00    |

At the bottom of the table, there is a pagination control showing '1-5 of 30 rows' and a 'Show 5' dropdown. A 'Download Disruptive Periods (Excel)' link is located at the bottom left of the table area.

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



New Disruptive Possession Request

**Request Information**

**Project**  
159710 -- Barrie Rail Corridor Expansion Contract 2

**Task Name (e.g. "[Jan10-14],[location]")**

**Corridors\***  
Lakeshore West

**Subdivisions\***  
Oakville

**Site Start Mile**  
1.1

**Site End Mile**  
39.3

**Start Date**  
2023-09-08

**End Date**  
2023-09-12

**Start Time**  
22 00

**End Time**  
04 00

**Type of Disruption**  
3-day (72h)

**Disruption Details and Scope of Work\***  
Describe BOTH the specifics of the disruption AND the activities taking place

**Notes**

**Submit Request for Review**

Submit Cancel

- 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.
- Click the Submit button. Your request is submitted. After your request is submitted, a user from long-term planning will follow up.
- After the DP-ID is accepted by the long-term planner
- 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 We: |
| 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 |

- 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:

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

New Disruptive Possession Request

**Request Information**

**Project**  
198701-BA -- Crossing Enhancements Package 1

**Task Name**  
1-1120

**Corridors\***  
Lakeshore East

**Subdivisions\***  
GO

**Site Start Mile**  
315.29

**Site End Mile**  
319.15

**Start Date**  
2022-09-23

**End Date**  
2022-09-25

**Start Time**  
23 00

**End Time**  
07 00

**Type of Disruption**  
3-day (72h)

**Disruption Details**

**MX Rail Service**

**External Rail Service**

**Bus\_Service**

**Notes**

**Status**  
Accepted

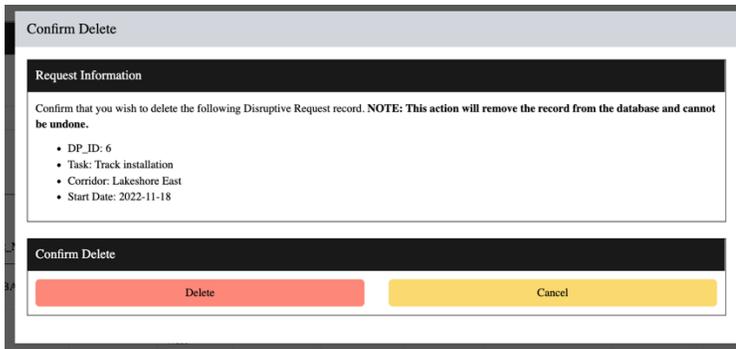
5. In the pop-up, make the changes or additions you need.
6. If you'd like an email confirmation for the changes you made, click the Send Email Confirmation? checkbox.
7. Click the Update button to save your changes.

### **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

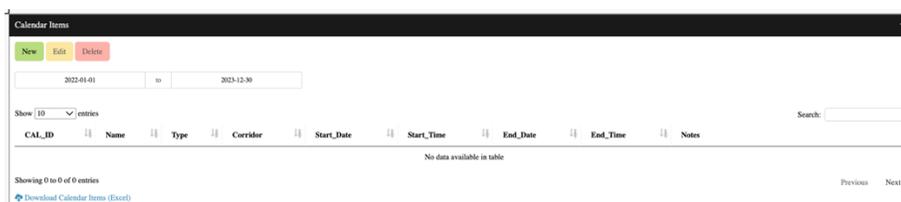
To download a spreadsheet that contains information about disruptive work blocks:

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.



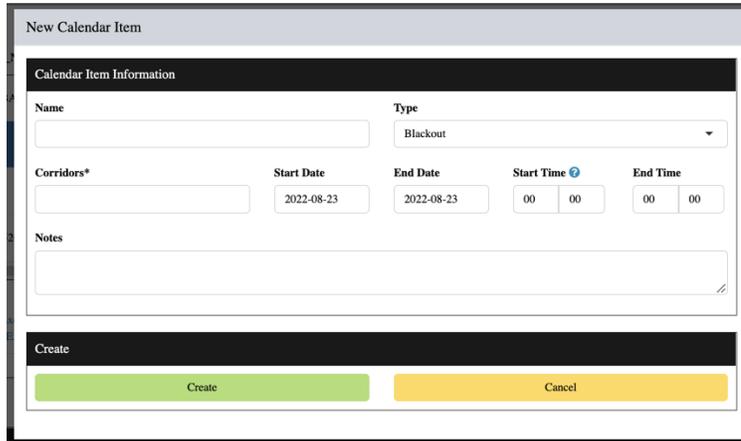
3. Change the date range if needed.

## 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.



The screenshot shows a 'New Calendar Item' pop-up window. At the top, it says 'New Calendar Item'. Below that is a section titled 'Calendar Item Information'. This section contains several fields: 'Name' (a text input field), 'Type' (a dropdown menu with 'Blackout' selected), 'Corridors\*' (a dropdown menu), 'Start Date' (a date picker showing '2022-08-23'), 'End Date' (a date picker showing '2022-08-23'), 'Start Time' (a time picker showing '00:00'), and 'End Time' (a time picker showing '00:00'). There is also a 'Notes' text area. At the bottom of the form, there is a 'Create' button (green) and a 'Cancel' button (yellow).

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.

- Click the Edit button.

The screenshot shows a 'New Calendar Item' form. The 'Calendar Item Information' section includes the following fields:

- Name: Test
- Type: 20% Discount
- Corridor: Lakeshore West
- Start Date: 2022-09-09
- End Date: 2022-09-11
- Start Time: 04:00
- End Time: 05:00
- Notes: (empty text area)

At the bottom of the form, there are two buttons: 'Update' (green) and 'Cancel' (yellow).

- In the pop-up, make the changes or additions you need.
- 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:

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

The screenshot shows a 'Confirm Delete' pop-up. The 'Calendar Item Information' section displays the following details:

- CAL\_ID: 1
- Name: Test
- Corridor: Lakeshore West
- Start Date: 2022-09-09

At the bottom of the pop-up, there are two buttons: 'Delete' (red) and 'Cancel' (yellow).

- Click the Delete button to delete the calendar item.

## Download Calendar Items

To download a spreadsheet that contains information about calendar items:

- On the main menu, click Calendar of Opportunities.
- 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.

Step 1: New or Existing Project?

Do you wish to create a new project or work on an existing project?

New

Step 2: Enter or Update Project and Contact Information

Project Information

Project Name

Project Number \*

Target Access Cost (\$)

0

Is the project an operating expenditure?

Yes

Submission Date

2022-12-14

Project Description

Describe the work being done and the goal of the project

Project Group or Owner

Graham

Create New Project/Co

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.



The screenshot shows a web form titled "Create a New Flagging Contractor". Below the title, there is a text prompt: "Enter the name of the Flagging Contractor you wish to create and click 'Submit'". The form has a label "Flagging Contractor Name" above a text input field. The input field contains the text "FlaggingCo Ltd.". Below the input field is a green "Submit" 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

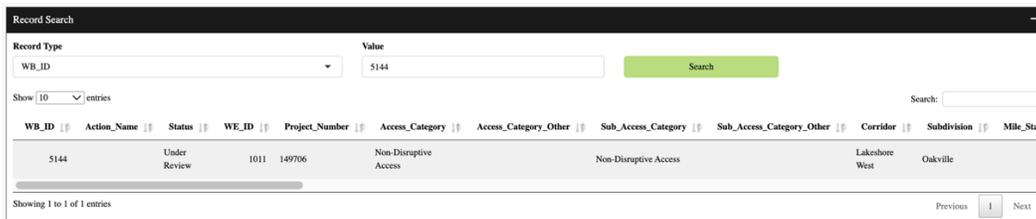
To search records:

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



The screenshot shows a 'Record Search' window with a 'Record Type' dropdown menu set to 'WB\_ID' and a 'Value' input field. A green 'Search' button is visible to the right of the input field.

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.



The screenshot shows the 'Record Search' window with the 'Record Type' dropdown set to 'WB\_ID' and the 'Value' field containing '5144'. The 'Search' button is highlighted in green. Below the search fields, there is a table with one entry.

| WB_ID | Action_Name  | Status | WE_ID | Project_Number | Access_Category       | Access_Category_Other | Sub_Access_Category   | Sub_Access_Category_Other | Corridor       | Subdivision | Mile_Stat |
|-------|--------------|--------|-------|----------------|-----------------------|-----------------------|-----------------------|---------------------------|----------------|-------------|-----------|
| 5144  | Under Review |        | 1011  | 149706         | Non-Disruptive Access |                       | Non-Disruptive Access |                           | Lakeshore West | Oakville    |           |

Showing 1 to 1 of 1 entries

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.

| WE_ID | Project_Number | Work_Event_Name                           | Access_Category       | Sub_Access_Category   | Corridors      | Subdivisions |
|-------|----------------|---|-----------------------|-----------------------|----------------|--------------|
| 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      | Haltom       |
| 4     | 166401 -Ext #2 | Khalli 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       |

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.

| WE_ID | Action_Name     | Status    | WE_ID | Project_Number | Access_Category       | Access_Category_Other | Sub_Access_Category      | Sub_Access_Cate |
|-------|-----------------|-----------|-------|----------------|-----------------------|-----------------------|--------------------------|-----------------|
| 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 |                 |

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.

| 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         |             |           |

### 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.

| 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_Mchls |
|-------|-----------------|-------|-------|-------------------------------------|------------------------|-------------|------------|------------|------------|----------|------------|----------|---------------------------------|----------------------------|
| 2     | 166401 - Est# 2 | 2     | 2     | 57 - Wrenier Pt - A1-Grade Crossing |                        | 10          | 2022-02-28 | 07:00      | 2022-02-28 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 3     | 166401 - Est# 2 | 2     | 3     | 57 - Wrenier Pt - A1-Grade Crossing |                        | 10          | 2022-03-01 | 07:00      | 2022-03-01 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 4     | 166401 - Est# 2 | 2     | 4     | 57 - Wrenier Pt - A1-Grade Crossing |                        | 10          | 2022-03-02 | 07:00      | 2022-03-02 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 5     | 166401 - Est# 2 | 2     | 5     | 57 - Wrenier Pt - A1-Grade Crossing |                        | 10          | 2022-03-03 | 07:00      | 2022-03-03 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 6     | 166401 - Est# 2 | 2     | 6     | 57 - Wrenier Pt - A1-Grade Crossing |                        | 10          | 2022-03-04 | 07:00      | 2022-03-04 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 7     | 166401 - Est# 2 | 2     | 7     | 57 - Wrenier Pt - A1-Grade Crossing |                        | 10          | 2022-03-04 | 07:00      | 2022-03-04 | 17:00    | 57.1       | 57.1     | 0                               | 0                          |
| 13    | 166401 - Est# 2 | 6     | 17    | 57 - Wrenier Pt - A1-Grade Crossing |                        | 5           | 2022-03-04 | 07:00      | 2022-03-04 | 17:00    | 57.1       | 57.1     | 0                               | 0                          |
| 8     | 166401 - Est# 2 | 6     | 13    | 57 - Wrenier Pt - A1-Grade Crossing |                        | 8           | 2022-02-28 | 07:00      | 2022-02-28 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 9     | 166401 - Est# 2 | 6     | 14    | 57 - Wrenier Pt - A1-Grade Crossing |                        | 8           | 2022-03-01 | 07:00      | 2022-03-01 | 17:00    | 56.1       | 58       | 0                               | 0                          |
| 10    | 166401 - Est# 2 | 6     | 15    | 57 - Wrenier Pt - A1-Grade Crossing |                        | 8           | 2022-03-02 | 07:00      | 2022-03-02 | 17:00    | 56.1       | 58       | 0                               | 0                          |

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 Group Logs

Search:

| Log_ID | WG_ID | Modified_By                    | Modified_Date         | Modified_Action | Log_Comment | Project_Number | WE_ID | WR_ID | Meeting_Location                  | Meeting_Location_Other |
|--------|-------|--------------------------------|-----------------------|-----------------|-------------|----------------|-------|-------|-----------------------------------|------------------------|
| 1      | 1     | grg.rward@occom-industries.com | 3/7/2022, 5:31:27 AM  | Created         | NA          | TEST123        | 1     | 1     | Other                             |                        |
| 2      | 1     | grg.rward@occom-industries.com | 3/7/2022, 6:22:44 AM  | Deleted         |             | TEST123        | 1     | 1     | Other                             |                        |
| 3      | 2     | grg.rward@occom-industries.com | 3/7/2022, 11:04:03 AM | Created         | NA          | 166401 -Ext #2 | 2     | 2     | 57 -Wentier P1 -At-Grade Crossing |                        |
| 4      | 7     | grg.rward@occom-industries.com | 3/7/2022, 11:08:58 AM | Created         | NA          | 166401 -Ext #2 | 2     | 7     | 57 -Wentier P1 -At-Grade Crossing |                        |
| 5      | 8     | jake.schabas@metrolinx.com     | 3/7/2022, 1:32:10 PM  | Created         | NA          | 166401 -Ext #2 | 6     | 13    | 57 -Wentier P1 -At-Grade Crossing |                        |
| 6      | 13    | jake.schabas@metrolinx.com     | 3/7/2022, 1:37:46 PM  | Created         | NA          | 166401 -Ext #2 | 6     | 17    | 57 -Wentier P1 -At-Grade Crossing |                        |
| 7      | 8     | jake.schabas@metrolinx.com     | 3/7/2022, 2:06:12 PM  | Updated         | NA          | 166401 -Ext #2 | 6     | 13    | 57 -Wentier P1 -At-Grade Crossing |                        |
| 8      | 9     | jake.schabas@metrolinx.com     | 3/7/2022, 2:06:12 PM  | Updated         | NA          | 166401 -Ext #2 | 6     | 14    | 57 -Wentier P1 -At-Grade Crossing |                        |
| 9      | 10    | jake.schabas@metrolinx.com     | 3/7/2022, 2:06:12 PM  | Updated         | NA          | 166401 -Ext #2 | 6     | 15    | 57 -Wentier P1 -At-Grade Crossing |                        |
| 10     | 11    | jake.schabas@metrolinx.com     | 3/7/2022, 2:06:12 PM  | Updated         | NA          | 166401 -Ext #2 | 6     | 16    | 57 -Wentier P1 -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

Project Logs

Search:

| Project_Name   | Project_Status | Project_Number | Submission_Date | Anticipated_Completion_Date | Target_Access_Cost | Is_Operating_Expenditure | Project_Description | Contra             |
|--|----------------|----------------|-----------------|-----------------------------|--------------------|--------------------------|---------------------|--------------------|
| 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 Infrastructure 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 <@> 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 Con (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.

The screenshot shows the 'Projects' interface with a 'Project Logs' tab selected. It features a search bar and a table with the following columns: Log\_ID, Modified\_By, Modified\_Date, Modified\_Action, Log\_Comment, and Project\_Name. Below the columns are filter buttons for each column, all set to 'All'. The table contains 22 rows of log entries. At the bottom, it indicates 'Showing 1 to 10 of 158 entries' and includes pagination controls (Previous, 1, 2, 3, 4, 5, ..., 16, Next).

| Log_ID | Modified_By                     | Modified_Date        | Modified_Action | Log_Comment | Project_Name                          |
|--------|---------------------------------|----------------------|-----------------|-------------|---------------------------------------|
| 1      | greg.sward@occam-industries.com | 3/7/2022, 5:28:52 AM | Created         | NA          | TEST                                  |
| 2      | greg.sward@occam-industries.com | 3/7/2022, 5:40:05 AM | Created         | NA          | Mount Pleasant- Guelph Sub            |
| 3      | greg.sward@occam-industries.com | 3/7/2022, 5:42:32 AM | Created         | NA          | Bramalea South Track - Halton Sub     |
| 7      | greg.sward@occam-industries.com | 3/7/2022, 5:54:28 AM | Created         | NA          | Kitchener Extension Package 2- G Sub  |
| 8      | greg.sward@occam-industries.com | 3/7/2022, 5:55:29 AM | Created         | NA          | Enhanced Train Control                |
| 9      | greg.sward@occam-industries.com | 3/7/2022, 5:58:42 AM | Created         | NA          | RC Maintenance                        |
| 19     | silvia.manuchian@metrolinx.com  | 3/7/2022, 9:16:01 PM | Created         | NA          | OnCorr Overhead Utilities Relocat     |
| 20     | silvia.manuchian@metrolinx.com  | 3/7/2022, 9:17:16 PM | Created         | NA          | UPA - Utility Preparatory Activitie   |
| 21     | silvia.manuchian@metrolinx.com  | 3/7/2022, 9:18:29 PM | Created         | NA          | Heritage Rd. Layover - Halton Sub     |
| 22     | silvia.manuchian@metrolinx.com  | 3/7/2022, 9:19:59 PM | Created         | NA          | Bramalea Parking structure- Halton CN |

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:

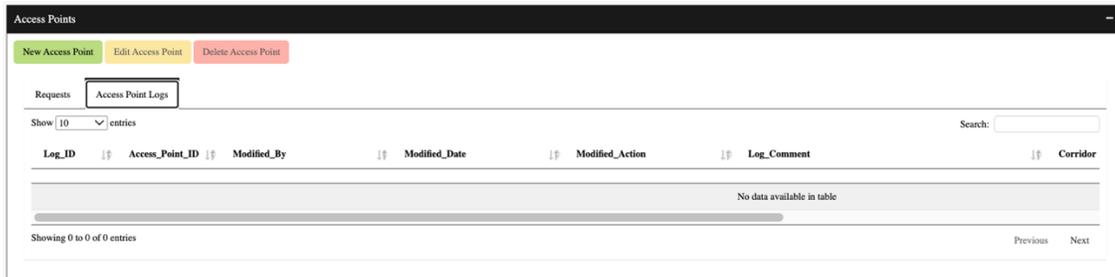
1. On the main menu, click Records. The Records page appears.
2. Click the plus (+) button on the Access Points section to expand it if needed. A list of access points appears.

The screenshot shows the 'Access Points' interface with tabs for 'Requests' and 'Access Point Logs'. It includes buttons for 'New Access Point', 'Edit Access Point', and 'Delete Access Point'. There is a search bar and a 'Show 10 entries' dropdown. The table has columns: Access\_Point\_ID, Corridor, Subdivision, Access\_Name, Mileage, and Access\_Type. Below the columns are filter buttons for each column, all set to 'All'. The table contains 10 rows of access point data. At the bottom, it indicates 'Showing 1 to 10 of 643 entries' and includes pagination controls (Previous, 1, 2, 3, 4, 5, ..., 65, Next).

| Access_Point_ID | Corridor | Subdivision | Access_Name          | Mileage | Access_Type              |
|-----------------|----------|-------------|----------------------|---------|--------------------------|
| 1               | Barrie   | Newmarket   | Lansdowne Ave - East | 3.1     | Construction Access Gate |
| 2               | Barrie   | Newmarket   | Lansdowne Ave - West | 3.14    | Construction Access Gate |
| 3               | Barrie   | Newmarket   | Bloor Value Village  | 3.91    | At-Grade Crossing        |
| 4               | Barrie   | Newmarket   | Wade Ave             | 4       | At-Grade Crossing        |
| 5               | Barrie   | Newmarket   | Patton Road          | 4.06    | At-Grade Crossing        |
| 6               | Barrie   | Newmarket   | Wallace Ave          | 4.19    | At-Grade Crossing        |
| 7               | Barrie   | Newmarket   | Antler Street        | 4.25    | At-Grade Crossing        |
| 8               | Barrie   | Newmarket   | Campbell Ave         | 4.6     | At-Grade Crossing        |
| 9               | Barrie   | Newmarket   | Caledonia Park       | 5       | At-Grade Crossing        |
| 10              | Barrie   | Newmarket   | Keith Ave            | 6.35    | Access Gate              |

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

- 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:

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

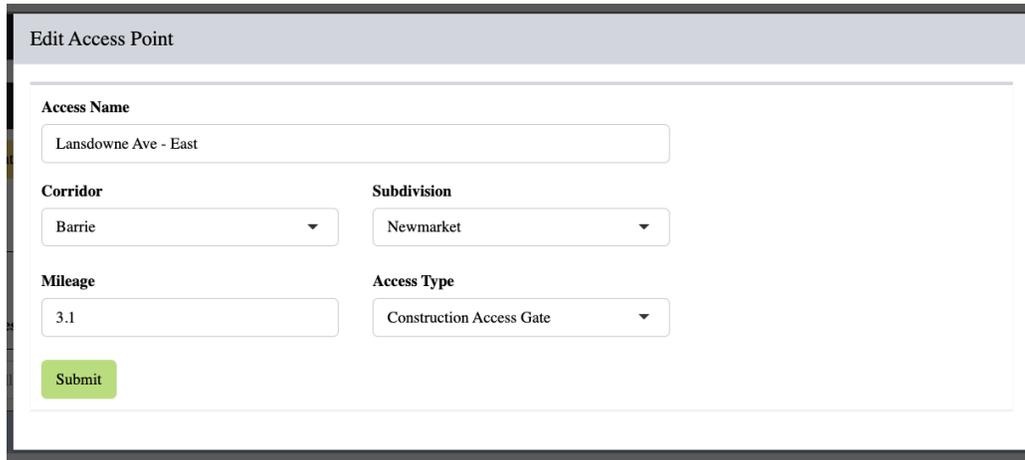
- Complete the fields:
  - Access Name
  - Corridor
  - Subdivision
  - Mileage
  - Access Type
- Click the Submit button. The new access point is created.

### Editing an Access Point

To edit an access point:

- 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.

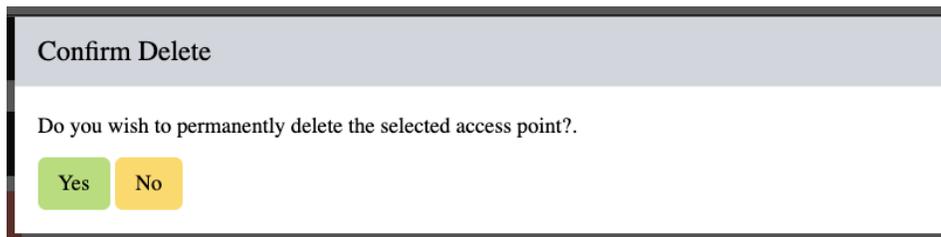


5. Edit the fields as needed.
6. Click the Submit button. Your changes are saved to the access point.

### ***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.



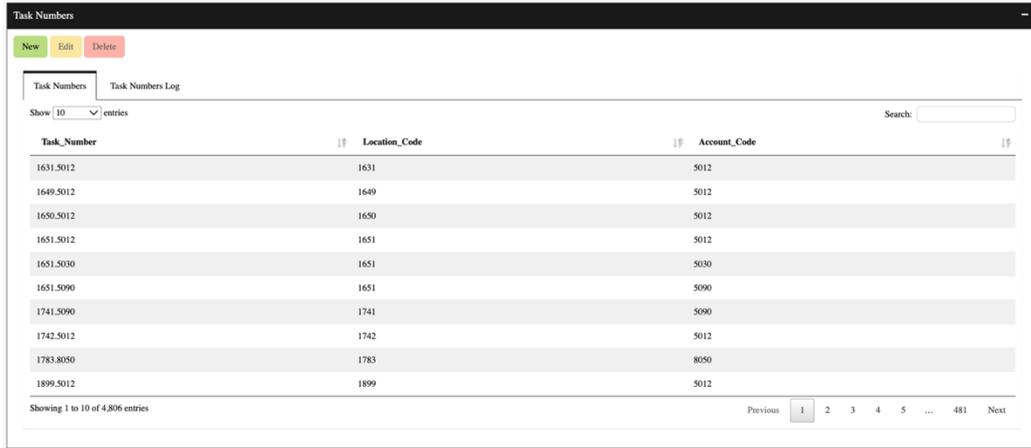
5. Click the Yes button to delete the access point.

### **Viewing Task Numbers and Logs**

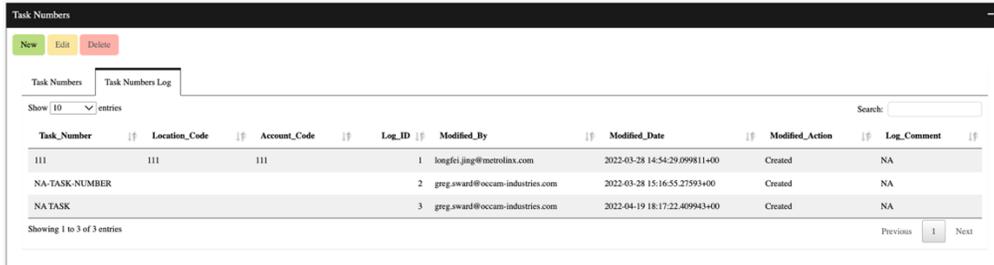
To view a list of task numbers as well as task number logs:

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

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



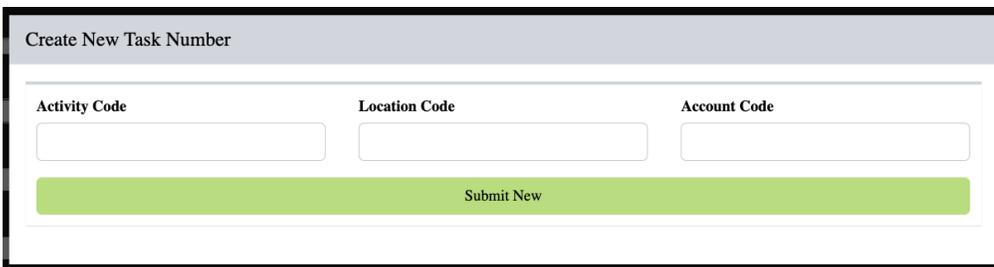
- You can sort and filter this list and you can use the search box to locate task numbers.
- Click the Task Number Logs tab to view a list of instances where a user made a change to a task number.



### Add a Task Number

To add a task number:

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

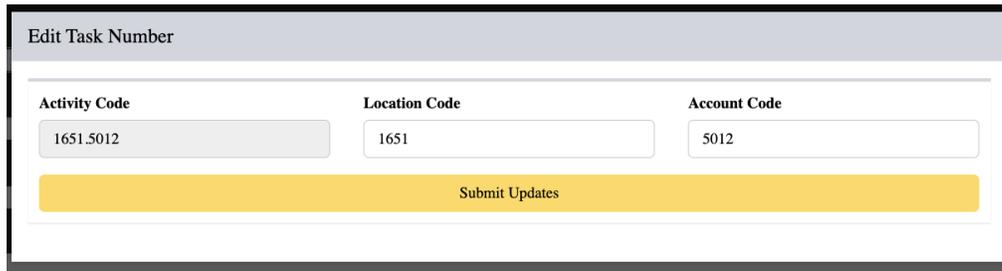


4. Complete the fields:
  - Activity Code
  - Location Code
  - Account Code
5. Click the Submit New button to save the new task number.

### **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.



The screenshot shows a pop-up window titled "Edit Task Number". It contains three input fields: "Activity Code" with the value "1651.5012", "Location Code" with the value "1651", and "Account Code" with the value "5012". Below these fields is a yellow button labeled "Submit Updates".

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.



The screenshot shows a pop-up window titled "Confirm Delete". It contains the text "Do you wish to delete task number: 1651.5012". Below this text are two buttons: a red "Yes" button and a yellow "No" button.

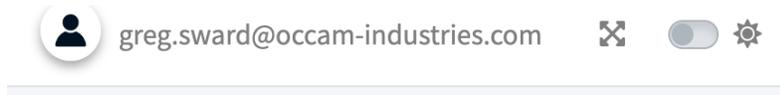
5. Click the Yes button to delete the task number.

## 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 by resizing your window or choosing a different table size or simply scrolling so that you can see the table header fully.*

### Table Size (Pixel Height)

1000

- 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'.

**Sort By**

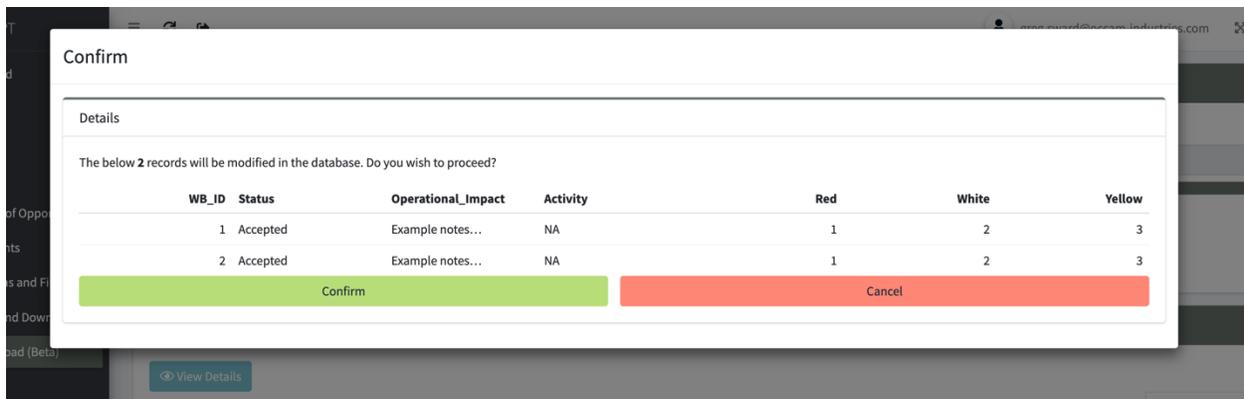
Subdivision Week Number Start Date  
Project

- 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.

| <input type="checkbox"/>            | Project  | WE_ID | Work Event Name  | WB_ID | Work Block Status | Num Work Groups | Num Work Groups Assigned Protection | Last Modified      |
|-------------------------------------|--|-------|--|-------|-------------------|-----------------|-------------------------------------|--------------------|
| <input checked="" type="checkbox"/> | 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  |
| <input checked="" type="checkbox"/> | Oriole GO  | 4882  | Dec 12-16 Oriole GO daytime  | 25231 | Under Review      | 1               | 1                                   | 11/28/20 8:55:50 A |
| <input checked="" type="checkbox"/> | Timber Deck Replacement                            | 4521  | BALA 7.4 - Week of Dec 12 (Weekdays)                                 | 23308 | Under Review      | 1               |                                     | 11/28/20 9:10:49 A |
| <input checked="" type="checkbox"/> | 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  |
| <input type="checkbox"/>            | 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

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

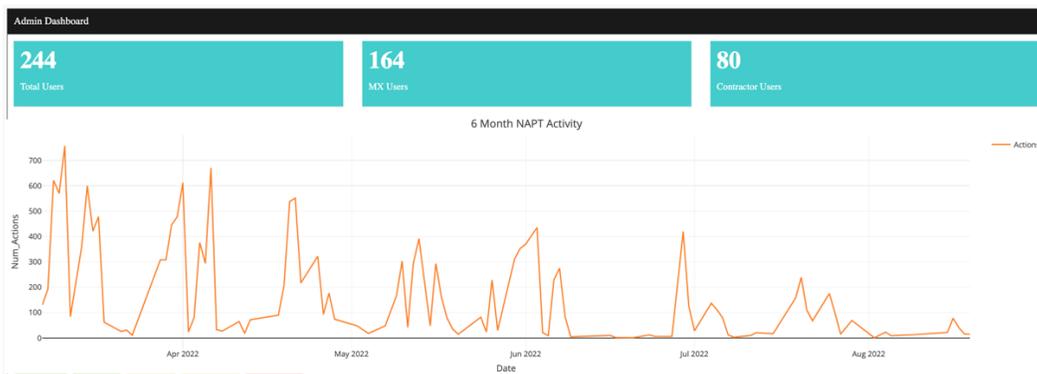
## Admin Tasks (NEW)

*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 closest 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.

| User_ID | User_Type   | Organization       |
|---------|-------------|--------------------|
| 1       | Project Dev | MX                 |
| 2       | Contractor  | PNR Railworks      |
| 3       | Contractor  | Black and McDonald |
| 4       | RCAC        | MX                 |
| 5       | Contractor  | PNR Railworks      |
| 6       | RCAC        | MX                 |
| 7       | Contractor  | PNR Railworks      |
| 8       | Project Dev | MX                 |
| 9       | Project Dev | MX                 |
| 10      | RCAC        | MX                 |

Showing 1 to 10 of 244 entries

[Download User Info](#)  
[Download User Project Assignments](#)  
[Download Project Information](#)

### 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:

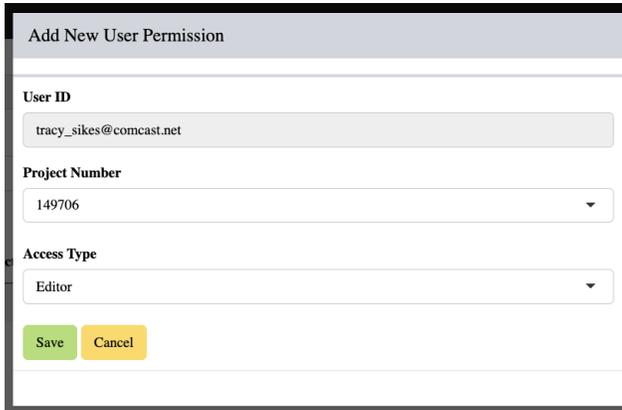
1. On the main menu, click Admin. The admin page opens.
2. In the list of users, locate the user profile you want to edit and click on it. You may want to use the search function to find the user profile quickly.
3. With the user profile selected, click the Edit User button. The Edit User page appears.

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.



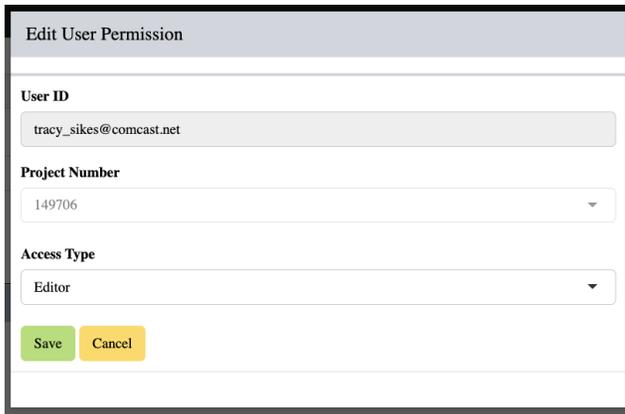
The screenshot shows a pop-up window titled "Add New User Permission". It contains three input fields: "User ID" with the value "tracy\_sikes@comcast.net", "Project Number" with a dropdown menu showing "149706", and "Access Type" with a dropdown menu showing "Editor". At the bottom of the form are two buttons: "Save" (green) and "Cancel" (yellow).

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.

| Entry_ID | User_ID | Project_Number          | Access_Type |        |
|----------|---------|-------------------------|-------------|--------|
| 1        | 665     | tracy_sikes@comcast.net | 149706      | Editor |

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:

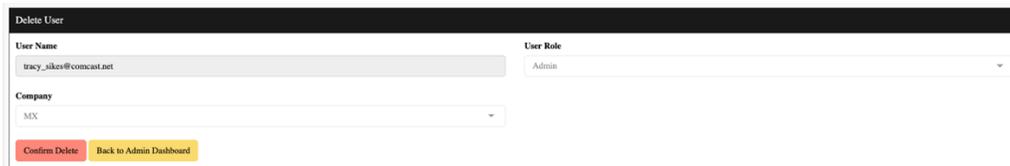
1. On the main menu, click Admin. The admin page opens.
2. Scroll to the bottom of the list of users and click the Download Project Information link.
3. A spreadsheet with information about all of the projects in the system downloads to your computer. The spreadsheet includes the project number,

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.

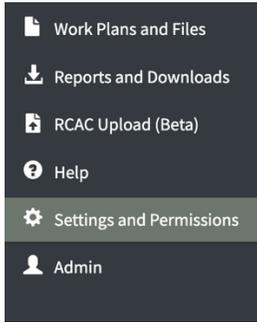


The screenshot shows a 'Delete User' pop-up window. It contains three input fields: 'User Name' with the value 'tracy\_sikav@comcast.net', 'User Role' with a dropdown menu showing 'Admin', and 'Company' with a dropdown menu showing 'MX'. At the bottom, there are two buttons: 'Confirm Delete' (red) and 'Back to Admin Dashboard' (yellow).

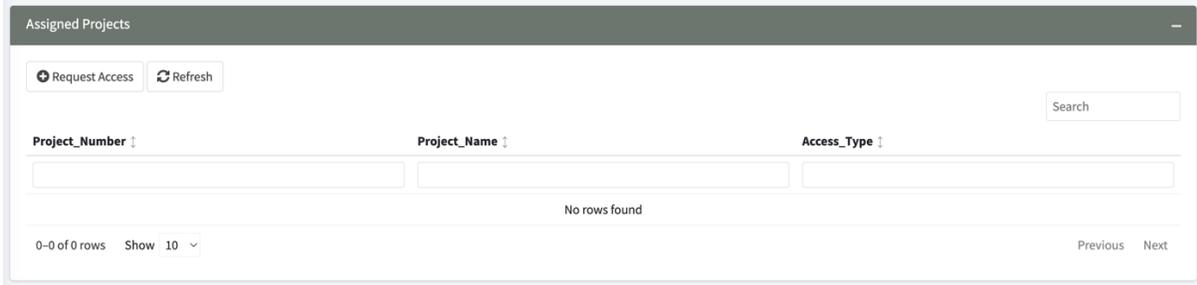
4. Click the Confirm Delete button. A pop-up appears to confirm the user has been deleted.

## Project Administrator (NEW)

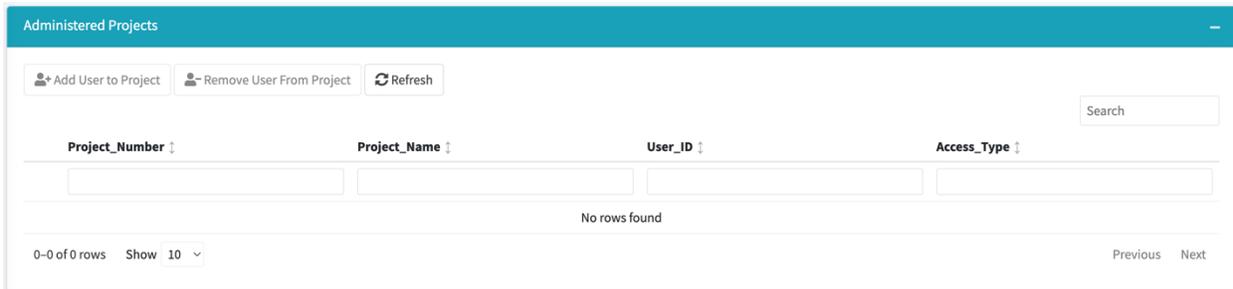
1. A new project-level role has been created, the 'Project Admin'.
2. Project Admins can add or remove users from the projects that they administer.
3. A project can have multiple Project Admins.
4. New 'Settings' Tab. Users can see their project permissions and administer projects.



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.