ProTrack+ 101
An Introduction to DDOT’s Project Management Application
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This tutorial provides an introduction to DDOT’s ProTrack+ project management application. This guidebook will cover several basic functions within ProTrack+, including:

- Creating projects and adding locations to project records
- Navigating projects through the solicitation and task order phases
- Using Packet Tracker to guide various requests through their approval processes
- Managing project locations using the Contract Administration module

For further information about ProTrack+, including more information about the features introduced in this tutorial, please visit the ProTrack+ page on DDOT’s wiki site, which features informational videos and guidebooks about the application.

To sign up and create a username for the ProTrack+ application, or for further questions about ProTrack+, please contact ptpsupport@dc.gov.
Creating Projects and Adding Locations to Project Records

During the planning process for a DDOT project, ProTrack+ users can create a project record and plot their project’s location(s) through the application’s interactive map.

Creating a Project
Users can create a project record and plot project location(s) at any time before the solicitation process. When naming a project, users should follow the project name conventions in the “Naming Guidance” and “Name Suggestor” documents that are included on the “New Project / Parent Record” page.

Adding Locations to Project Records
Once users create a new project record, they can plot the location(s) of their project using the ProTrack+ interactive map. The ProTrack+ map feature allows users to define project locations by plotting points, lines and polygons; these shapes can be used to define small to large location areas, respectively. This “ProTrack+ 101” guidebook covers several of these location plotting methods, but for more information, please see the guidebooks and videos available on the ProTrack+ wiki page.
Creating a Project in ProTrack+

**STEP #1**

- Go to Home Page
- Select Project Management tab
- Click on “New Project / Parent Record”

**STEP #2**

- Fill out all applicable fields in Project Details form
- Click the “Submit” button

*Note: When naming your projects, please follow the suggested naming conventions in the “Naming Guidance” and “Name Suggestor” documents.*
Locating a Project in ProTrack+

**STEP #1**

- Go to Home Page
- Select Project Management tab
- Click on “List of Project / Parent Records”

**STEP #2**

Search for your project!
- Click on the triple dot icon near each category to change sorting order
- Or scroll through options in the drop-down menus
Locating a Project in ProTrack+

STEP #3

Click on the “Add/Edit Location(s)” icon to add or edit your project’s location(s)
How to Add Point Projects

Note: To open the ProTrack+ interactive map and find your project’s location please see the “Locating a Project in ProTrack+” section (page 4).

Examples of Projects that can be Entered as Point Projects

• Traffic Signage Installation
• Street Light Installation
• Traffic Signal Installation
• Small / Isolated Infrastructure Projects

STEP #1

• Select the “Add a Point Project” icon
How to Add Point Projects

**STEP #2**

- Click on your project’s location

**STEP #3**

Select different methods to highlight your location. Choose:
- Exact location
- Closest street
- Intersection
How to Add Point Projects

**Step #4**

- Fill out all applicable fields in the table
- Click “Submit Location”
How to Add Street Segments

Note: To open the ProTrack+ interactive map and find your project’s location please see the “Locating a Project in ProTrack+” section (page 4).

Examples of Projects that can be Entered as Street Segments

- Roadway Paving
- Pavement Markings Installation
- Sidewalk Repairs

STEP #1

- Click on the “Select Street Segments from Segments” icon
How to Add Street Segments

**STEP #2**

- Click and scroll over the street segment that you’d like to select
- Release mouse button after you have highlighted the street segment

**STEP #3**

You can select multiple street segments!
- Selecting multiple street segments will compile them under one project
How to Add Street Segments

Step #4

- Click “Add Selected Streets as a Project” icon

Step #5

- Click “Select this location”
How to Add Street Segments

**STEP #6**

- Fill out all applicable fields in the table
- Click “Submit Location”

*Note: For information about plotting other types of line projects, polygon-shaped projects and uploading CSV files with project location data, please see the “Creating Projects and Adding Locations to Project Records” guidebook or view the related training videos on the ProTrack+ wiki page.*
Managing Locations in the Contract Administration Module

After a project finishes the solicitation process and a contract has been awarded, users can oversee the project and manage it through its life cycle in the Contract Administration module.

Users can fill out the following fields for each location in a project record as they track the state of a project:

- Status (Under Construction, Under Design, Substantially Complete, etc.)
- Percentage Complete
- Estimated and actual start and completion dates
- Estimated and actual cost
Adding and Managing Locations in Contract Administration

Note: If you already added “shovel-ready” locations to your project map during the solicitation process you can skip to Step #6 (page 9).

**STEP #1**

- Go to Home Page
- Select Contract Administration tab
- Click on “Manage Project Status”

**STEP #2**

Search for your project!
- Click on the triple dot icon near each category to change sorting order
- Or scroll through options in the drop-down menus

Click on the “Add/Edit Location(s)” icon
Adding and Managing Locations in Contract Administration

**STEP #3**

- Select the “Select Locations from Project Initiation” icon

**STEP #4**

- Select the project location you would like to select
- Click on “Add this feature”
Adding and Managing Locations in Contract Administration

**STEP #5**

- The location you added will now show up as a red line / point / polygon on the Contract Administration map
- Add more locations from the original project record as needed

**STEP #6**

- To manage the project location’s status and information, click on the project’s location and edit the fields in the pop-up that appears
- To save the changes that you’ve made in the various fields within the pop-up, scroll to the bottom of the pop-up and click “Save”
As you change the project location’s status in the associated pop-up, the color of the project location will change.

**Note:** Project locations that are under construction, but less than 75 percent complete will be color coded orange; projects that are more than 75 percent complete will appear green.
The Contract Administration map has many other features that you can use to help manage your project:

- Add work orders and service requests to the scope of your project
- Relate permits to your project
- Generate mailing addresses for affected residents and business owners

**Adding Work Orders and Service Requests - Step #1**

- Click on the location to activate the pop-up
- Click on the “Open Issues” button
**Contract Administration Map Tools**

**ADDING WORK ORDERS AND SERVICE REQUESTS - STEP #2**

- Select the service requests or work orders you would like to add to the scope of your project
- Click on “Add Selected to Scope”

**Note:** If you add work orders and service requests to the scope of your project it will result in the following:

- Selected open issues will be added in ProTrack+
- Status of selected work orders will be scheduled in Cityworks and a work order task will be created with the ProTrack+ project status
- When your project status changes in ProTrack+, new work order tasks will be created, and the previous task order will be marked as complete
- Selected service requests will be marked pending in Cityworks.
**Contract Administration Map Tools**

### Relating Permits to Your Project

- Click on the location to activate the pop-up
- Click on the “Relate Permits” button
- A pop-up on the bottom left of the screen will appear, featuring permits within the project area
- Select the permits that you would like to relate to the project.
- Click on “Relate to Project”

**Note:** Relating permits to projects is helpful for project managers to see potential conflicts and possibilities for cost sharing.

Users can also utilize this feature to see if permits conflict with one another and perhaps synchronize two permitted projects. For example:

- If the location of two permits requiring excavation overlap, both parties can perhaps be notified and collaborate to mitigate roadway closures and disruption.
Generate Mailing Addresses for Affected Residents and Business Owners - Step #1

- Click on the location to activate the pop-up
- Click on the “Generate Mailing Addresses” button

Generate Mailing Addresses for Affected Residents and Business Owners - Step #2

- ProTrack+ will automatically generate an Excel spreadsheet of the addresses of nearby stakeholders that might be affected by the project, for use in various project-related public outreach efforts.
Exporting Project Information to DTAP

Once you start managing your project’s location(s) in the Contract Administration module, you have the ability to export the information in the Contract Administration map to the District Transportation Access Portal (DTAP) so that public can view the project as it progresses through its life cycle.

Once you publish your project to DTAP, the changes you make to the project’s status in the Contract Administration map (for example, changing a location from 25 percent to 50 percent complete) will be reflected on DTAP so the public can view the status of the project in real time.

**STEP #1**

- Find your project on the Manage Project Status page (see Page 7)
- Click on the “Publish” icon
Using the Map Viewer’s Research Tools

ProTrack+ is foremost known as a project management application. It is, however, it is much more than that as well. Included in ProTrack+, specifically in the application’s GIS map feature, are powerful research tools that can be used to quickly investigate a great number of issues: from work orders and construction permits near a given address to what an intersection looked like on the ground – and from above – four to five years ago.

In this section, we highlight a few of the many tools that are featured on the ProTrack+ GIS map. This is a brief introduction into how to research issues using ProTrack+; it is by no means an exhaustive look into all the tools that are featured on the ProTrack+ GIS map. For more questions about these tools, please contact the ProTrack+ team at ptpsupport@dc.gov.

To access the ProTrack+ General Map Viewer tool, please follow the steps below:

**Opening the General Map Viewer**

- Go to the ProTrack+ Home Page
- Select “Map Viewer” tab
- Click on “General Map Viewer”
Using the Toggle Layers Feature

Note: To open the ProTrack+ General Map Viewer, please see the directions on page 23.

Examples of Information in the Toggle Layers Feature

- DDOT work order and service requests (Cityworks)
- Construction and occupancy permits (TOPS)
- Transit infrastructure (Capital Bikeshare stations, bus stops, traffic signals, etc.)
- Parking information (loading zones, tour bus parking, etc.)
- Official boundaries (ANCs, MPD districts, wards, zip codes, etc.)

STEP #1

- Select the “Toggle Layers” icon
Using the Toggle Layers Feature

**Example A: DDOT Work Orders and Service Requests - Step #1**

- Click on the “+” sign near the “Cityworks Layers” option
- Select Work Order and/or Service Request

**Example A: DDOT Work Orders and Service Requests - Step #2**

- Click on any point to see more information about the work order / service request (Work Order ID, Request ID, CSR Number, etc.)
- For more information, use the Work Order ID or CSR Number to investigate the issue in Cityworks
Using the Toggle Layers Feature

**EXAMPLE B: CONSTRUCTION AND OCCUPANCY PERMITS - STEP #1**

- Click on the “+” sign near the “TOPS Layers” option
- Select the type of permit you would like to see information about

**EXAMPLE B: CONSTRUCTION AND OCCUPANCY PERMITS - STEP #2**

- Click on any point to see more information about the permit (tracking number, permittee, etc.)
- For more information, use the tracking number to investigate the issue in TOPS
Using CycloMedia

Note: To open the ProTrack+ General Map Viewer, please see the directions on page 23.

Ways to Utilize CycloMedia

• CycloMedia features street view imagery, which is more robust than Google Street View, and goes in alleys in the District
• Time Travel feature, which allows you to view the location several years in the past

STEP #1

• Select the “Show CycloMedia” icon
Using CycloMedia

**STEP #2**

- Click on a point on the map where you would like to see street view imagery (the date on the top of the image is the date that the location was filmed)
- Scroll around the scene by clicking on the large green dots

**CycloMedia’s Time Travel Feature - STEP #1**

- Click on on the date on the image to activate CycloMedia’s Time Travel feature, which allows you see how a location looked at different points in time over the past several years
Using CycloMedia

**CycloMedia's Time Travel Feature - Step #2**

- Click on one of the points on the timeline to see what the location looked like on a given date

**CycloMedia’s Time Travel Feature - Step #3**

- Voila! Now you can scroll around the scene in Time Travel mode, and see what the location looked like a year – or even three years – ago.
ProTrack+ users can use the application’s filter feature to highlight DDOT projects on the ProTrack+ Map Viewer by using different queries.

For more information on using queries that are not covered in this tutorial, please visit the following webpages, which include examples of various simple and complex formulas:

- [SQL Comparison Operators](#)
- [SQL Logical Operators](#)
- [SQL Wildcard Operators](#)
Setting Up Map Viewer to Use Filter Feature

Note: Before using the filter feature, please open the ProTrack+ General Map Viewer by following the directions on page 13.

**STEP #1**

- Click on the “Toggle Layers” icon

**STEP #2**

- Select what kind of DDOT projects you want to filter for (point, line or polygon projects)
- Deselect the kind of projects you don’t want to view
- Click on “Filter Projects” icon
Filter DDOT Projects Using Simple and Compound Queries

Note: To set up the Map Viewer to filter for various DDOT projects, please first follow the directions in the “Setting Up Map Viewer to Use Filter Feature” section (page 15).

**Step #1**

- After clicking the “Filter Projects” icon (Step #4 in previous section) a pop-up box appears
- Identify your desired category of project from the “Project Type” drop-down menu (select from point, line or polygon projects)

**Step #2**

- Enter a query using different variables and equations in the highlighted section above – examples below
Filter DDOT Projects Using Simple and Compound Queries

EXAMPLE #1 – FILTERING FOR LINE PROJECTS BY WARD (WARD 5)

- Select “Line Project” in the Project Type drop-down menu
- Select and double-click “Ward” from the menu below, then double-click “=” from the queries menu. This query will filter line projects by a specific ward, in this case Ward 5.
- With Ward highlighted click the “Unique Values” button. The available options to choose from will appear for the Ward category – select “5.” The equation in the highlighted box at the bottom should read: Ward = ‘5’.
- Click “Apply Filter”

The result: Only line projects in Ward 5 appear in the Map Viewer
Filter DDOT Projects Using Simple and Compound Queries

**Example #2 – Filtering for Ward 5 Sidewalk Construction Projects**

To highlight Ward 5 sidewalk construction projects, add the following language to the query in Example #1:

- Click on the “And” button in the query menu. “AND” should then appear after “Ward = ‘5’.”
- With “WorkType” highlighted, click the “Unique Values” button. Scroll down the menu that appears above the unique values button and double-click “COO-MA-SDWKCON - ‘Sidewalk Construction’.” The following equation should appear below: Ward = ‘5’ AND WorkType = ‘COO-MA-SDWKCON’.
- Click “Apply Filter”

The result: Only Ward 5 sidewalk construction projects appear in the Map Viewer.
The ProTrack+ Packet Tracker module is used by DDOT staff to usher agreements, contracts and other documents through their various approval processes. These documents are not necessarily related to funding or procurement issues — in some cases they are memorandum of understandings (MOUs), project close-out requests and other documents that involve other, non-monetary matters.

To access the ProTrack+ Packet Tracker module and open a new request, please follow the steps below:

**Creating a New Request in Packet Tracker - Step #1**

- Go to the ProTrack+ Home Page
- Select “Packet Tracker” tab
- Click on “New Request”
Creating a New Request in Packet Tracker - Step #2

- Users are required to fill out all the fields marked with an “*”
- Please fill out all remaining fields, if possible. Note: For questions about the relevant FAP Number and DC Project Number, please contact the Office of the Chief Financial Officer.
- After you are finished completing the form, click “Save & Continue”

Creating a New Request in Packet Tracker - Step #3

- Attach the relevant document (for example, a Change Order in this case and any supporting information) by clicking the “+ Add New Document” button
- Note: You can view the first reviewer and the workflow process by looking at the “Submitted To” and “Approval Process” fields, respectively
• Fill out all applicable fields
• Click “Upload” \textit{(Note: Your document will not load and you will not be able to submit your Packet Tracker request if you do not click “Upload”)}
• Click “Submit” to finalize your request and send it on to the first reviewer in the Packet Tracker process
Each document that is uploaded to Packet Tracker goes through a multi-step approval process. Please follow the instructions below to find and review a Packet Tracker request. In this tutorial, we will look up and review the new Packet Tracker request that was previously submitted on Page 37.

**REVIEWING A PACKET TRACKER REQUEST - STEP #1**

- Go to the ProTrack+ Home Page
- Select “Packet Tracker” tab
- Click on “Inbox - Assigned to You / Group”
Packet Tracker Module - Reviewing a Request

**Reviewing a Packet Tracker Request - Step #2**

- Find the request in the “Inbox - Assigned to You” or the “Inbox - Assigned to Group” sections
- Click on the “Review” icon on the same line as the request

**Reviewing a Packet Tracker Request - Step #3**

- Click on the “Select” button in the “Request Workflow Details” section
**Packet Tracker Module - Reviewing a Request**

**REVIEWING A PACKET TRACKER REQUEST - STEP #4**

- Select “Approve,” “Decline,” “Hold” or “Revise and Re-submit” depending on what action you would like to take
- Enter your comments as necessary
- Click on the “Update” button

**REVIEWING A PACKET TRACKER REQUEST - STEP #5**

- After you click “Update” in the step above it will take you back to this page, where you will see the next reviewer on the list below you
- If you’d like to edit the comments that you made, select the “Edit Comment” button
The Procurement Process - Creating a New Solicitation Request

STEP #1

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group”

STEP #2

- Click on the “Create Solicitation Request” button
The Procurement Process - Creating a New Solicitation Request

**STEP #3**

- Fill out all the fields that are marked with a "*". **Note: If you need the DC Project Number please refer to the PROMPT system or ask an Office of Contracting and Procurement (OCP) staff member.**
- Click on the “Continue” button

**STEP #4**

- Fill out all the fields that are marked with a "*"
- Click on the “Save & Continue” button
The Procurement Process - Creating a New Solicitation Request

**STEP #5**

- After you press “Save & Continue” in the previous step, you will be taken to this page, where you will see the workflow steps of the solicitation process at the top of the page.
- Scroll down to add documents related to the solicitation request.

**STEP #6**

- In the Documents section, at the bottom of the page, you will see a “Required Documents” field. Please upload the type of documents that are listed here.
- Before you upload the relevant documents you must select the Document Type in the drop-down menu. In this instance, “Engineer’s Estimate” has been selected.
- After selecting the document type, click on the “Select Files” button to find the relevant file on your computer.
After you have uploaded all the required documents, you can submit the solicitation request to the first reviewer. In this case, you can click on the “Submit to RM” button to move the process forward to Resource Management.

Alternatively, if you are not ready to submit the solicitation request to the next approver, you can press “Save” and return to the request later.
The Procurement Process - Assigning a Solicitation Request

**STEP #1**

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group”

**STEP #2**

- Find the solicitation request you’re looking for and click on the “Re-Assign” icon
The Procurement Process - Assigning a Solicitation Request

**STEP #3**

- Go to the “Assign To” section and click on the drop-down menu in the “Assigned To” field to select who should review the document in the division.
The Procurement Process - Reviewing a Solicitation Request

**STEP #1**

- Go to the ProTrack+ Home Page
- Select “Procurement” tab
- Click on “Inbox - Assigned to You/Group”

**STEP #2**

- Find the solicitation request you want to review and click the “Review” icon
The Procurement Process - Reviewing a Solicitation Request

**STEP #3**

At the top of the page you will see the workflow steps of the solicitation process. The current step that the solicitation process is in is highlighted in orange.

**STEP #4**

- Scroll down to the bottom of the page
- Add comments by selecting the “Add Comments” button and then entering text
- Click on the “Revise & Resubmit” button to request that the previous person in the workflow process revise their submission or click “Submit to...” to send it to the next party in the solicitation workflow