Library Management Participant Guide

# U.S. Department of Transportation Federal Highway Administration

# **Library Management Participant Guide**



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# 2. Introduction to Using the Participant Guide

The Participant Guide helps you get started with the process of setting up library catalogs. These catalogs help you in defining, storing, and managing reusable data to provide standard data sources to complete forms and information fields in the application.

The options selected for use in this guide are for instructional purposes to showcase the process of managing library content. Field selections, other than the ones used in this guide, could lead to a varied project workflow, and may not be covered in this guide. For additional information on the application, refer to Masterworks Online Help available with the application.

**Note:** You may notice screenshots containing information added throughout the document, even in places where a new empty screen would typically be displayed. This practice eliminates the need for multiple images, allowing a single screenshot to convey the essential details required to proceed with the work effectively.

# 3. Library Management

The Masterworks Library module serves as a collection of catalogs to manage reusable information. In catalogs, you create, define, and store reusable information that is used while creating a record. This ensures consistency in the available information and provides a standardization factor to ensure the integrity of the information.

The process of adding, editing, viewing, and deleting items from the library catalogs follows a mostly similar procedure throughout the application. However, certain catalogs, like the Document Folder Structure and Document Properties catalogs, operate differently.

The following topics describe the various catalogs and functions you can perform to manage library information:

- <u>3.1. Standard Library Functions</u>
- <u>3.2. Library Catalogs</u>

# **Library Catalog Permission Matrix**

This section provides information on the roles and corresponding permissions for the respective catalogs.

Note: The Table 1 – Library Catalog provides roles and permission information for all library catalogs except the Standard Items Table, Measurement Unit Crosswalk, and Standard Items Conversion Crosswalk catalog.

| Role              | Create | Edit | View | Delete | Audit Log |
|-------------------|--------|------|------|--------|-----------|
| Administrator     | Yes    | Yes  | Yes  | Yes    | Yes       |
| A/E Support Tools | -      | -    | Yes  | -      | -         |
| Project Viewer    | -      | -    | Yes  | -      | -         |
| Design Component  | -      | -    | Yes  | -      | -         |
| Lead              |        |      |      |        |           |
| Designer          | -      | -    | Yes  | -      | -         |
| Lead Designer     | -      | -    | Yes  | -      | -         |
| Design QA/QC      | -      | -    | Yes  | -      | -         |
| Highway Design    | -      | -    | Yes  | -      | -         |
| Manager           |        |      |      |        |           |
| Project Manager   | -      | -    | Yes  | -      | -         |
| A/E Designer      | -      | -    | Yes  | -      | -         |
| A/E Lead Designer | -      | -    | Yes  | -      | -         |
| A/E Manager       | -      | -    | Yes  | -      | -         |
| Acquisitions      | -      | -    | Yes  | -      | -         |
| Construction      | Yes    | Yes  | Yes  | Yes    | Yes       |
| Component Lead    |        |      |      |        |           |

### Table 1: Table 1 – Library Catalog

| Role                         | Create | Edit | View | Delete | Audit Log |
|------------------------------|--------|------|------|--------|-----------|
| Construction Admin           | -      | -    | Yes  | -      | -         |
| Staff                        |        |      |      |        |           |
| <b>Construction Engineer</b> | -      | -    | Yes  | -      | -         |
| Construction                 | -      | -    | Yes  | -      | -         |
| <b>Operations Engineer</b>   |        |      |      |        |           |
| Assistant Project            | -      | -    | Yes  | -      | -         |
| Engineer                     |        |      |      |        |           |
| Project Engineer             | -      | -    | Yes  | -      | -         |
| Regional Engineer            | -      | -    | Yes  | -      | -         |
| Assistant Project            | -      | -    | Yes  | -      | -         |
| Engineer A&E                 |        |      |      |        |           |
| Project Engineer A&E         | -      | -    | Yes  | -      | -         |

# Note: The Table 2 – Library Catalog table provides roles and permission information for only Standard Items Table, Measurement Unit Crosswalk, and Standard Items Conversion Crosswalk catalogs.

### Table 2: Table 2 – Library Catalog

| Role           | Create | Edit | View | Delete | Audit Log |
|----------------|--------|------|------|--------|-----------|
| Administrator  | Yes    | Yes  | Yes  | Yes    | Yes       |
| Pay Item Team  | Yes    | Yes  | Yes  | Yes    | Yes       |
| A/E Support    | -      | -    | Yes  | -      | -         |
| Tools          |        |      |      |        |           |
| Project Viewer | -      | -    | Yes  | -      | -         |
| Design         | -      | -    | Yes  | -      | -         |
| Component      |        |      |      |        |           |
| Lead           |        |      |      |        |           |
| Designer       | -      | -    | Yes  | -      | -         |
| Lead Designer  | -      | -    | Yes  | -      | -         |
| Design QA/QC   | -      | -    | Yes  | -      | -         |
| Highway        | -      | -    | Yes  | -      | -         |
| Design         |        |      |      |        |           |
| Manager        |        |      |      |        |           |
| Project        | -      | -    | Yes  | -      | -         |
| Manager        |        |      |      |        |           |
| A/E Designer   | -      | -    | Yes  | -      | -         |
| A/E Lead       | -      | -    | Yes  | -      | -         |
| Designer       |        |      |      |        |           |
| A/E Manager    | -      | -    | Yes  | -      | -         |
| Acquisitions   | -      | -    | Yes  | -      | -         |
| Construction   | -      | -    | Yes  | -      | -         |
| Component      |        |      |      |        |           |
| Lead           |        |      |      |        |           |

| Role           | Create | Edit | View | Delete | Audit Log |
|----------------|--------|------|------|--------|-----------|
| Construction   | -      | -    | Yes  | -      | -         |
| Admin Staff    |        |      |      |        |           |
| Construction   | -      | -    | Yes  | -      | -         |
| Engineer       |        |      |      |        |           |
| Highway        | -      | -    | Yes  | -      | -         |
| Construction   |        |      |      |        |           |
| Manager/QA     |        |      |      |        |           |
| QC             |        |      |      |        |           |
| Construction   | -      | -    | Yes  | -      | -         |
| Operations     |        |      |      |        |           |
| Engineer       |        |      |      |        |           |
| Inspector      | -      | -    | Yes  | -      | _         |
| Assistant      | -      | -    | Yes  | -      | -         |
| Project        |        |      |      |        |           |
| Engineer       |        |      |      |        |           |
| Project        | -      | -    | Yes  | -      | -         |
| Engineer       |        |      |      |        |           |
| Regional       | -      | -    | Yes  | -      | -         |
| Engineer       |        |      |      |        |           |
| Construction   | -      | -    | Yes  | -      | -         |
| Inspection A&E |        |      |      |        |           |
| Manager        |        |      |      |        |           |
| Inspector A&E  | -      | -    | Yes  | -      | -         |
| Assistant      | -      | -    | Yes  | -      | -         |
| Project        |        |      |      |        |           |
| Engineer A&E   |        |      |      |        |           |
| Project        | -      | -    | Yes  | -      | -         |
| Engineer A&E   |        |      |      |        |           |

# **3.1. Standard Library Functions**

The following library item-related tasks are common in procedure for most of the library catalogs:

- <u>3.1.1. Adding an Item to a Catalog</u>
- <u>3.1.2. Editing Item Details in a Catalog</u>
- <u>3.1.3. Viewing Details of an Item in a Catalog</u>
- <u>3.1.4. Deleting an Item from a Catalog</u>

# 3.1.1. Adding Library Items

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 or Table 2 Library Catalog</u> <u>Permission Matrix</u>

### Overview

You can add library items to a catalog individually. Alternatively, you can concurrently import multiple library items into a catalog using a predefined Microsoft Excel workbook template.

To import multiple library items, you must download the template from the application to your local hard drive, fill in the required information, and then import the updated Microsoft Excel workbook to the catalog. For more information on uploading multiple items, refer to <u>Section 4.2. Importing Form Details from an Excel Workbook</u>.

The **Contact Type** library catalog is used as an example to demonstrate how to add, edit, and delete library items.

### Steps

1. In the module menu, click **Library**.

The LIBRARY MANAGEMENT page is displayed.



Figure 1: Library Management

2. In the navigation pane, click a library catalog. The items in the selected catalog are displayed.

|    | LIBRARY                                    | CONTACT TYPE   |                   |
|----|--|--|-------------------|
| Q, | Type to Search 🗙 🗙                         | 🗘 New 🖹 Reports 👻 🛱 Excel Import / Export 👻 💬 More 👻 |                   |
|    | 📩 Contract Management 💧                    | Name Name  | Description       |
| ۱. | <ul> <li>Adjustments</li> </ul>            |  |                   |
| mB | Area of Work Affected                      | Subcontractor  | Subcontractor     |
|    | Change Modification Type                   | Utility  | Utility Companies |
| Ø  | Claim Types                                | Other  |                   |
|    | CM Initiated By                            | Partner Agency                                       |                   |
|    | CM Issue Reasons                           | FHWA   |                   |
|    | Contact Type                               | Consultant   |                   |
|    | Contractual Effects of C                   | Contractor   |                   |
|    | <ul> <li>Daily Diary Categories</li> </ul> |  |                   |
|    | FAR Authority                              |  |                   |
|    | ■ FOIA Requester's Catego                  |  |                   |
|    | <ul> <li>Idle Codes</li> </ul>             |  |                   |



### 3. Click New.

The page to create a new item is displayed.

| CONTACT TYPE |                 |               |   |
|--------------|-----------------|---------------|---|
| Save & Exit  | Save & Continue | ( Cancel      |   |
|              |                 |               |   |
|              | Name *:         | Subcontractor |   |
|              | Description :   | Subcontractor |   |
|              |                 |               | 7 |
|              |                 |               |   |
|              |                 |               |   |

Figure 3: Contact Type Details Page

- 4. Enter the appropriate information for the item.
- 5. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.1.2. Editing Item Details

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 or Table 2 Library Catalog</u> <u>Permission Matrix</u>

### Overview

Updating the information for a library item does not update the records where the library item has been used previously. However, the updated library item is available for use in new records.

You can also update information for multiple library items in a library catalog using a predefined Microsoft Excel workbook template. You can download the Microsoft Excel workbook to your local hard drive, update the appropriate information in the workbook, and then import the updated Microsoft Excel workbook to the catalog. For information on updating or uploading multiple items, refer to <u>Section 4.2.</u> Importing Form Details from an Excel Workbook.

The **Contact Type** library catalog is used as an example to demonstrate how to add, edit, and delete library items.

### Steps

 In the module menu, click Library. The LIBRARY MANAGEMENT page is displayed.



Figure 4: Library Management

2. In the navigation pane, click a library catalog. The items in the selected library catalog are displayed.

|          | LIBRARY                                    | CONTACT TYPE   |                   |
|----------|--|--|-------------------|
| 9        | Type to Search 🗙 🗙                         | 🗘 New 📋 Reports 👻 💱 Excel Import / Export 👻 💬 More 👻 |                   |
|          | 📩 Contract Management 💧                    | Name   | Description       |
| 14       | <ul> <li>Adjustments</li> </ul>            |  |                   |
| mB       | Area of Work Affected                      | Subcontractor  | Subcontractor     |
|          | Change Modification Type                   | Utility  | Utility Companies |
| <b>@</b> | Claim Types                                | Other  |                   |
|          | CM Initiated By                            | Partner Agency                                       |                   |
|          | CM Issue Reasons                           | FHWA   |                   |
|          | Contact Type                               | Consultant   |                   |
|          | Contractual Effects of C                   | Contractor   |                   |
|          | <ul> <li>Daily Diary Categories</li> </ul> |  |                   |
|          | FAR Authority                              |  |                   |
|          | ■ FOIA Requester's Catego                  |  |                   |
|          | <ul> <li>Idle Codes</li> </ul>             |  |                   |

Figure 5: List Page of Contact Type Form

3. Select the appropriate item from the list page, and click Edit.



Figure 6: Edit Option

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4. Edit the necessary information.

| CONTACT TYPE | Save & Continue | Cancel        |   |
|--------------|-----------------|---------------|---|
|              | Name *:         | Subcontractor |   |
|              | Description :   | Subcontractor | • |
|              |                 |               |   |

Figure 7: Modify the Details

5. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.1.3. Viewing Details of a Library Item

You can view a summary of item details or all the details of a selected item on the application, or you can download item information to an Excel workbook.

You can perform the following tasks:

- <u>3.1.3.1. View information of a library item</u>
- <u>3.1.3.2. Download information of multiple library items</u>

# **3.1.3.1.** Viewing Information of a Library Item

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- Construction Component Lead
- A/E Support Tools
- Project Viewer
- Design Component Lead
- Designer
- Lead Designer
- Design QA/QC
- Highway Design Manager
- Project Manager
- A/E Designer

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- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QA QC
- Construction Operations Engineer
- Inspector
- Assistant Project Engineer
- Project Engineer
- Regional Engineer
- Construction Inspection A&E Manager
- Inspector A&E
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to <u>Table 1 or Table 2 Library Catalog</u> <u>Permission Matrix</u>

### Steps

1. In the module menu, click **Library**.

### The LIBRARY MANAGEMENT page is displayed.



Figure 8: Library Management

2. In the navigation pane, click a library catalog.

The items in the selected library catalog are displayed.

|             | LIBRARY                                      | CONTACT TYPE   |                   |
|-------------|--|--|-------------------|
| Q,          | Type to Search 🗙 🗙 🔨                         | 🗘 New 🖹 Reports 👻 💱 Excel Import / Export 👻 💬 More 👻 |                   |
|             | 📩 Contract Management 🔺                      | Name Name  | Description       |
| <u>ا</u> نت | <ul> <li>Adjustments</li> </ul>              | T  |                   |
| nn E        | <ul> <li>Area of Work Affected</li> </ul>    | Subcontractor  | Subcontractor     |
|             | <ul> <li>Change Modification Type</li> </ul> | Utility  | Utility Companies |
| 181         | <ul> <li>Claim Types</li> </ul>              | Other  |                   |
|             | <ul> <li>CM Initiated By</li> </ul>          | Partner Agency                                       |                   |
|             | CM Issue Reasons                             | FHWA   |                   |
|             | Contact Type                                 | Consultant   |                   |
|             | Contractual Effects of C                     | Contractor   |                   |
|             | <ul> <li>Daily Diary Categories</li> </ul>   |  |                   |
|             | FAR Authority                                |  |                   |
|             | FOIA Requester's Catego                      |  |                   |
|             | <ul> <li>Idle Codes</li> </ul>               |  |                   |



3. To view complete details of a selected item, select the appropriate item from the list page, and click **View**.

| со | CONTACT TYPE                        |                   |  |  |  |  |
|----|-------------------------------------|-------------------|--|--|--|--|
| _0 | _🜶 Edit 💿 View 🔟 Delete 🖹 Reports 🗸 |                   |  |  |  |  |
|    | Name                                | Description       |  |  |  |  |
|    |                                     |                   |  |  |  |  |
|    | Subcontractor                       | Subcontractor     |  |  |  |  |
|    | Utility                             | Utility Companies |  |  |  |  |
|    | Other                               |                   |  |  |  |  |
|    | Partner Agency                      |                   |  |  |  |  |
|    | FHWA                                |                   |  |  |  |  |
|    | Consultant                          |                   |  |  |  |  |
|    | Contractor                          |                   |  |  |  |  |
|    |                                     |                   |  |  |  |  |

Figure 10: View Option

### The **CONTACT TYPE** page is displayed.

| CONTACT TYPE     |               |   |  |  |  |
|------------------|---------------|---|--|--|--|
| _Ø Edit 🛞 Cancel |               |   |  |  |  |
| Name *:          | Subcontractor |   |  |  |  |
| Description :    | Subcontractor | • |  |  |  |
|                  |               |   |  |  |  |

Figure 11: Contact Type Details Page

# 3.2.3.2. Downloading Information of Multiple Library Items Steps

#### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|    | LIBRARY               |            | LIBRARY MANAGEMENT                  |
|----|-----------------------|------------|-------------------------------------|
| ٩, | Type to Search        | <b>×</b> ∧ | Configure Standard Tables and Items |
|    | Bidding               |            | Create modify library data.         |
| 朣  | Contract Management   |            |                                     |
|    | Contractors           |            |                                     |
| Ô  | 🔲 Document Management |            |                                     |
| ~~ | 🛅 Estimate            |            |                                     |
|    | 🛅 Fund Management     |            |                                     |
|    | Notifications         |            |                                     |
|    | 🖿 Project Management  |            |                                     |
|    | 🖿 Resource Management | <          |                                     |
|    | Time Zones            |            |                                     |
|    |                       |            |                                     |
|    |                       |            |                                     |

Figure 12: Library Management

2. In the navigation pane, click a library catalog.

The items in the selected library catalog are displayed.

|            | LIBRARY                                    | CONTACT TYPE |  |                   |  |  |
|------------|--|--------------|--|-------------------|--|--|
| Q, I       | Type to Search 🗙 🗙                         | 🞝 New        | 🖹 Reports 👻 👫 Excel Import / Export 👻 💬 More 👻 |                   |  |  |
| 俞          | 📩 Contract Management 🔷                    | Nan Nan      | ne   | Description       |  |  |
| <u>ا</u> ش | <ul> <li>Adjustments</li> </ul>            |              | T  |                   |  |  |
| nnfi       | <ul> <li>Area of Work Affected</li> </ul>  | Sub          | contractor                                     | Subcontractor     |  |  |
|            | Change Modification Type                   | 🔲 Utili      | ty   | Utility Companies |  |  |
| 181        | <ul> <li>Claim Types</li> </ul>            | Oth-         | er   |                   |  |  |
|            | <ul> <li>CM Initiated By</li> </ul>        | Part         | ner Agency                                     |                   |  |  |
|            | CM Issue Reasons                           | FHW          | /Α   |                   |  |  |
|            | Contact Type                               | Con          | sultant  |                   |  |  |
|            | Contractual Effects of C                   | Con          | tractor  |                   |  |  |
|            | <ul> <li>Daily Diary Categories</li> </ul> |              |  |                   |  |  |
|            | EAR Authority                              |              |  |                   |  |  |
|            | ■ FOIA Requester's Catego                  |              |  |                   |  |  |
|            | <ul> <li>Idle Codes</li> </ul>             |              |  |                   |  |  |

Figure 13: List Page of Contact Type Form

3. In the item list page, click **Excel Import / Export**, and then select **Excel Export**.

| co | NTACT TYPE      |   |                   |
|----|-----------------|---|-------------------|
| Ð  | New 📋 Reports 👻 | Bit Excel Import / Export ▼ 💮 More ▼                              |                   |
|    | Name            | Excel Import  | Description       |
|    | Subcontractor   | R Excel Export (xlsx)   | Subcontractor     |
|    | Utility         | Excel Template (xls)  | Utility Companies |
|    | Other           | Excel Template (xisx)   |                   |
|    | Partner Agency  | Excel Template With Data (xis)     Excel Template With Data (xis) |                   |
|    | FHWA            |   |                   |
|    | Consultant      |   |                   |
|    | Contractor      |   |                   |
|    |                 |   |                   |

Figure 14: Excel Export

The items in the catalog with all details are downloaded to an Excel workbook and saved in the local hard drive.

**Note:** If you have filtered records, then only the records that match the filter criteria is available in the downloaded file.

# 3.1.4. Deleting an Item

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 or Table 2 Library Catalog</u> <u>Permission Matrix</u>

### Overview

Deleting a library item from a catalog does not delete the information from records that have used the library item. However, the library item will not available for use in new records being created.

The **Contact Type** library catalog is used as an example to demonstrate how to add, edit, and delete library items.

### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.



Figure 15: Library Management

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2. In the navigation pane, click a library catalog.

The items in the selected catalog are displayed.

|             | LIBRARY                                    | CONTAC | CONTACT TYPE                                   |                   |  |  |  |  |
|-------------|--|--------|--|-------------------|--|--|--|--|
| Q, I        | Type to Search 🗙 🗙 🔨                       | D New  | 🗎 Reports 👻 🛱 Excel Import / Export 👻 💮 More 👻 |                   |  |  |  |  |
| 諭           | 📩 Contract Management 🔺                    | Nar    | me   | Description       |  |  |  |  |
| <u>l</u> i≟ | Adjustments                                |        | T  |                   |  |  |  |  |
| nn P        | <ul> <li>Area of Work Affected</li> </ul>  | Sub    | ocontractor                                    | Subcontractor     |  |  |  |  |
|             | Change Modification Type                   | 🔲 Util | lity   | Utility Companies |  |  |  |  |
| 187         | <ul> <li>Claim Types</li> </ul>            | Oth    | ner  |                   |  |  |  |  |
|             | <ul> <li>CM Initiated By</li> </ul>        | 🔲 Par  | ther Agency                                    |                   |  |  |  |  |
|             | CM Issue Reasons                           | E FHV  | NA   |                   |  |  |  |  |
|             | Contact Type                               | Cor    | nsultant                                       |                   |  |  |  |  |
|             | Contractual Effects of C                   | Cor    | ntractor                                       |                   |  |  |  |  |
|             | <ul> <li>Daily Diary Categories</li> </ul> |        |  |                   |  |  |  |  |
|             | FAR Authority                              |        |  |                   |  |  |  |  |
|             | ■ FOIA Requester's Catego                  |        |  |                   |  |  |  |  |
|             | ■ Idle Codes                               |        |  |                   |  |  |  |  |

Figure 16: List Page of Contact Type Form

3. Select the required items from the list page, and click **Delete**.

| co | CONTACT TYPE   |          |             |   |                   |  |  |  |
|----|----------------|----------|-------------|---|-------------------|--|--|--|
| _0 | Edit 💿 View    | 🔟 Delete | 🗐 Reports 🔻 |   |                   |  |  |  |
|    | Name           |          |             |   | Description       |  |  |  |
|    |                |          |             | T |                   |  |  |  |
|    | Subcontractor  |          |             | : | Subcontractor     |  |  |  |
|    | Utility        |          |             |   | Utility Companies |  |  |  |
|    | Other          |          |             |   |                   |  |  |  |
|    | Partner Agency |          |             |   |                   |  |  |  |
|    | FHWA           |          |             |   |                   |  |  |  |
|    | Consultant     |          |             |   |                   |  |  |  |
|    | Contractor     |          |             |   |                   |  |  |  |
|    |                |          |             |   |                   |  |  |  |

Figure 17: Delete Option

A confirmatory message is displayed, and the item is deleted from the list page.

| fhwasitdm.masterworkslive.com says                      |    |        |  |  |  |  |
|---|----|--------|--|--|--|--|
| Are you sure you want to Delete the selected record(s)? |    |        |  |  |  |  |
|   | ОК | Cancel |  |  |  |  |

Figure 18: Confirmation Message

# 3.2 Standard Library Catalogs

# **3.2.1. Library Catalogs**

The procedure for adding, viewing, editing and deleting items in a library catalog, remains consistent across most parts of the application. For example, in library catalogs such as Contact Type, Business Types, Skies, Fund Type, Terrain, etc.

To learn how to configure library information in a simple catalog, refer to Standard Library Functions.

Specific library catalogs such as the Standard Items Table, Document Folder Structure, and Document Properties differ in their handling.

To learn how to configure library information in catalogs other than the simple ones, refer to the following topics:

- 3.2.2. Contract Management
  - o <u>3.2.2.1. Specification Section</u>
  - o <u>3.2.2.2. Submittal Response</u>
- 3.2.3. Contractors
  - o <u>3.2.3.1. Contractor Details</u>
- 3.2.4. Document Management
  - o <u>3.2.4.1. Document Folder Structure</u>
  - o <u>3.2.4.2. Document Properties</u>
  - o <u>3.2.4.3. Associating Document Property Templates to Folders in a Folder Structure</u>
- 3.2.5. Estimate
  - o <u>3.2.5.1. Construction Inflation Indices</u>
- 3.2.6. Notifications
  - o 3.2.6.1. Mail Merge Process
- 3.2.7. Project Management
  - o <u>3.2.7.1. Additional Permissions Setup</u>
  - o <u>3.2.7.2. Calendar</u>
  - o <u>3.2.7.3. Measurement Systems</u>
  - o <u>3.2.7.4. Measurement Unit Crosswalk</u>
  - o <u>3.2.7.5. Standard Items Tables</u>
  - o <u>3.2.7.6. Standard Items Conversion Crosswalk</u>

# 3.2.2. Contract Management

# **3.2.2.1. Specification Section**

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

The **Specification Section** form enables you to define the specification section and associate it with the standard items table.

The specification sections defined in the library are used in the Submittals form of the contract.

### Steps

1. In the module menu, click **Library**.

The LIBRARY MANAGEMENT page is displayed.



Figure 19: Library Management

2. In the navigation pane, expand **Contract Management**, and then click **Specification Section**. The **SPECIFICATION SECTION** list page is displayed.

| LIBRARY                |  |   | SPE | SPECIFICATION SECTION                      |         |                                   |           |   |  |
|------------------------|--|---|-----|--|---------|-----------------------------------|-----------|---|--|
| 🔍 Type to Search 🗙 🗸 🔨 |  |   | Ð   | 💭 New 📴 Excel Import / Export 👻 💮 More 👻 🍸 |         |                                   |           |   |  |
|                        | Payment Types                          |   |     | StandardItemsTableName                     | Section | Section Titles                    | Is Active |   |  |
| L.                     | <ul> <li>REA Types</li> </ul>          |   |     | T  | T       |                                   |           | T |  |
| enfi                   | <ul> <li>Skies</li> </ul>              |   |     | FP 03                                      | Other   | Other                             |           |   |  |
|                        | <ul> <li>Soil</li> </ul>               |   |     | FP 14                                      | 722     | ANCHOR MATERIAL                   |           |   |  |
| (8)                    | Specification Section                  |   |     | FP 14                                      | 721     | ELECTRICAL AND ILLUMINATION MATER | ~         |   |  |
|                        | <ul> <li>Submittal Response</li> </ul> | 1 |     | FP 14                                      | 720     | STRUCTURAL WALL AND STABILIZED EM |           |   |  |
|                        | <ul> <li>Submittal Type</li> </ul>     |   |     | FP 14                                      | 719     | PAINT                             | ~         |   |  |
|                        | <ul> <li>Supporting Facts</li> </ul>   |   |     | FP 14                                      | 718     | TRAFFIC SIGNING AND MARKING MATER |           |   |  |
|                        | Wind                                   |   |     | FP 14                                      | 717     | STRUCTURAL METAL                  |           |   |  |
|                        | Work Condition                         |   |     | FP 14                                      | 716     | MATERIAL FOR TIMBER STRUCTURES    |           |   |  |
|                        | <ul> <li>Work Items</li> </ul>         |   |     | FP 14                                      | 715     | PILING                            |           |   |  |
|                        | Contractors                            | В |     | FP 14                                      | 714     | GEOSYNTHETIC MATERIAL             |           |   |  |
|                        | 🛅 Document Management                  | L |     | FP 14                                      | 713     | ROADSIDE IMPROVEMENT MATERIAL     |           |   |  |
|                        | 🖿 Estimate                             | L |     | FP 14                                      | 712     | JOINT MATERIAL                    |           |   |  |
|                        | 🖿 Fund Management                      | L |     | FP 14                                      | 711     | CONCRETE CURING MATERIAL AND AD   |           |   |  |
|                        | Notifications                          | L |     | FP 14                                      | 710     | FENCE AND GUARDRAIL               |           |   |  |
|                        | 🖿 Project Management                   |   |     | FP 14                                      | 709     | REINFORCING STEEL AND WIRE ROPE   | ~         |   |  |
|                        | Resource Management                    |   |     | FP 14                                      | 708     | PLASTIC PIPE                      |           |   |  |

Figure 20: List page of Specification Section Form

### 3. Click New.

The **SPECIFICATION SECTION** page is displayed.

| SPECIFICATION SECTION       |                       |  |
|-----------------------------|-----------------------|--|
| Save & Exit Save & Continue | (%) Cancel            |  |
|                             |                       |  |
| Standard Items Table Name : | FP 14                 |  |
| Section *:                  | 714                   |  |
| Section Titles *:           | GEOSYNTHETIC MATERIAL |  |
| Is Active :                 | <b>~</b>              |  |
|                             |                       |  |

Figure 21: Specification Section Details Page

4. Provide the appropriate information in the fields, as described in the following table:

| Field Name                | Description   |  |  |  |  |
|---------------------------|---|--|--|--|--|
| Standard Items Table Name | To associate the standard items table with the specification  |  |  |  |  |
|                           | section, perform the following steps:   |  |  |  |  |
|                           | a. Click .  |  |  |  |  |
|                           | The Standard Items Table Name dialog box is displayed.  |  |  |  |  |
|                           | Figure 22: : Standard Items Table Name Dialog Box<br>b. Click the appropriate table and click <b>Select</b> . |  |  |  |  |

| Field Name     | Description  |
|----------------|--|
| Section        | Enter the section number.                                  |
| Section Titles | Enter the name of the section.                             |
| Is Active      | Ensure the check box is selected to make the specification |
|                | section active for use in the <b>Submittals</b> form.      |

5. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.2.2.2. Submittal Response

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead

For more information on role-specific permissions, refer to Table 1 – Library Catalog Permission Matrix

### Overview

You can create a submittal response and set it to work in either of the following ways in a submittal form:

- Create a copy of the submittal for revision
- Close the submittal

For information on the **Submittal** form, refer to **Submittals** section in the **Construction Participant Guide - Part C**.

### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|    | LIBRARY               |            |                                     |
|----|-----------------------|------------|-------------------------------------|
| 9  | Type to Search        | <b>×</b> ∧ | Configure Standard Tables and Items |
|    | Bidding               |            | Create modify library data.         |
| 朣  | 🖿 Contract Management |            |                                     |
|    | Contractors           |            |                                     |
| ÷  | 🛅 Document Management |            |                                     |
| ~~ | Estimate              |            |                                     |
|    | 🛅 Fund Management     |            |                                     |
|    | Notifications         |            |                                     |
|    | 🛅 Project Management  |            |                                     |
|    | 🛅 Resource Management | <          |                                     |
|    | Time Zones            |            |                                     |
|    |                       |            |                                     |
|    |                       |            |                                     |

Figure 23: Library Management

2. In the navigation pane, expand **Contract Management**, and then click **Submittal Response**. The **SUBMITTAL RESPONSE** list page is displayed.

|      | LIBRARY                            |            | SUBMI | TTAL RESPONSE                                    |                    |
|------|------------------------------------|------------|-------|--|--------------------|
| Q,   | Type to Search                     | <b>Y</b> A | 🞝 Net | W 📓 Reports 👻 🛐 Excel Import / Export 👻 💬 More 👻 |                    |
| â    | <ul> <li>Payment Types</li> </ul>  |            | Su    | ibmittal Response                                | Revision Required? |
| 14   | REA Types                          |            |       |  |                    |
| nnii | <ul> <li>Skies</li> </ul>          |            | E Re  | evise and Resubmit                               |                    |
|      | Soil                               |            | Al    | pproved  |                    |
| ŵ    | Specification Section              |            | C Re  | evision not required                             |                    |
|      | Submittal Response                 |            | D Re  | evision Required                                 | <b>v</b>           |
|      | <ul> <li>Submittal Type</li> </ul> |            |       |  |                    |
|      | Supporting Facts                   |            |       |  |                    |
|      | Wind                               | •          |       |  |                    |
|      | <ul> <li>Work Condition</li> </ul> |            |       |  |                    |
|      | <ul> <li>Work items</li> </ul>     |            |       |  |                    |
|      | Contractors                        |            |       |  |                    |

Figure 24: List Page of Submittal Response Form

3. Click New.

The SUBMITTAL RESPONSE page is displayed.

| SUBMITTAL RESPONSE   |
|--|
| 🗈 Save & Exit 🛛 🚡 Save & Continue 🏾 🏵 Cancel                     |
| Submittal Response *: Revise and Resubmit Revision Required? : 🗹 |

Figure 25: Submittal Response Details Page

- 4. In the Submittal Response box, enter submittal response.
- 5. To create a revision of a submittal, select the **Revision Required** check box.
- 6. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

### 3.2.3. Contractors

### 3.2.3.1. Contractor Details

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

The **Contractor Details** catalog comprises a list of contractors. It enables you to define and manage details of a contractor, such as the UEI number, address, and phone number.

### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|                  | LIBRARY   |     | LIBRARY MANAGEMENT   |
|------------------|---|-----|--|
| Q<br>か<br>証<br>… | LIBRARY Type to Search Bidding Contract Management Contractors Document Management  | * * | LIBRARY MANAGEMENT<br>Configure Standard Tables and Items<br>Create modify library data. |
| <u>چ</u>         | <ul> <li>Document Management</li> <li>Estimate</li> <li>Fund Management</li> <li>Notifications</li> <li>Project Management</li> </ul> |     |  |
|                  | <ul> <li>Resource Management</li> <li>Time Zones</li> </ul>   | ¢   |  |

Figure 26: Library Management

2. In the navigation pane, expand **Contractors**, and then click **Contractor Details**. The **CONTRACTOR DETAILS** list page is displayed.

|     | LIBRARY                            |   | CONTR | ACTOR DETAILS   |                         |            |               |           |                |
|-----|------------------------------------|---|-------|-----------------|-------------------------|------------|---------------|-----------|----------------|
| C   | Type to Search 🛛 🗙 🗸 🔨             | ÷ | ) Nev | / 🗎 Reports 👻 🖓 | Excel Import / Export 👻 | 💬 More 🕶   |               |           | Т              |
|     | Bidding                            |   |       | ID              | Company Name            | UEI Number | Business Type | Is Active | Subcontractor? |
| k   | Contract Management                |   |       | T               |                         | T          |               |           |                |
| L.  | Contractors                        | × | Subo  | ontractor: No   |                         |            |               |           |                |
|     | <ul> <li>Business Types</li> </ul> |   |       | 9081            | Winkler Excavating, Inc |            |               |           |                |
|     | = Contractor Details               |   |       | 9080            | Wilson Concrete         |            |               |           |                |
| -20 | Document Management                |   |       | 9079            | Wilson Brothers Constr  |            |               |           |                |
|     | Estimate                           |   |       | 9078            | Wilson Bros             |            |               |           |                |
|     | Fund Management                    | < |       | 9077            | Williams Blasting and D |            |               |           |                |
|     | Notifications                      |   |       | 9076            | Willamette valley steel |            |               |           |                |
|     | Project Management                 |   |       | 9075            | Wildlands Inc.          |            |               |           |                |
|     | Resource Management                |   |       | 9074            | WILDER CONST. CO. INC.  |            |               |           |                |
|     | Time Zones                         |   |       | 9073            | WIDMAN MINING CON       |            |               |           |                |
|     |                                    |   |       | 9072            | WHITE EAGLE CONST.      |            |               |           |                |
|     |                                    |   |       | 9071            | Wheeler Electric Inc.   |            |               |           |                |
|     |                                    |   |       | 9070            | Wharton Asphalt, LLC    |            |               |           |                |
|     |                                    |   |       | 9069            | Wharton Asphalt         |            |               |           |                |
| 1   |                                    | K |       | 1 2 3 4 5 (     | 5 7 8 9 10              | ► H        |               |           | Page 2 of 413  |

Figure 27: List Page of Contractor Details Form

3. Click New.

The **CONTRACTOR DETAILS** page is displayed.

| CONTRACTOR DE | TAILS                  |   |           |         |       |          |              |             |
|---------------|------------------------|---|-----------|---------|-------|----------|--------------|-------------|
| Save & Exit   | Save & Contin          | ue 🛞 Cancel   |           |         |       |          |              |             |
|               | ID                     | : <auto gener<="" th=""><th>ated&gt;</th><th></th><th></th><th></th><th></th><th></th></auto> | ated>     |         |       |          |              |             |
|               | Company Name           | *: Key Stone Lir  | mited     |         |       |          |              |             |
|               | UEI Number             | DD3432  |           |         |       |          |              |             |
|               | Business Type          | 8a Firm 🗙   |           |         |       |          |              |             |
|               | Subcontractor?         | : 🗖   |           |         |       |          |              |             |
|               | PrimeContractor?       | : 🔽   |           |         |       |          |              |             |
|               | Is Active              | : 🗹   |           |         |       |          |              |             |
| ADDRESS       |                        |   |           |         |       |          |              | -1          |
| Is Default    | Use Address for<br>Bid | Address 1   | Address 2 | City    | State | Zip Code | Phone Number | Email ID    |
|               |                        | Vega  | Boulevard | Houston | тх    | 77204    | 222-222-2222 | a@amail.com |
|               |                        |   |           |         |       |          |              |             |
| Add Edit      | Delete                 |   |           |         |       |          |              |             |
|               |                        |   |           |         |       |          |              |             |

Figure 28: Contractor Details Page

4. Provide the appropriate information in the fields, as described in the following table:

| Field Name       | Description  |
|------------------|--|
| ID               | On saving the record, a unique identification number for the     |
|                  | record is automatically generated.                               |
| Company Name     | Enter the name of the company.                                   |
| UEI Number       | Enter the UEI number of the contractor.                          |
| Business Type    | From the drop-down list, select the business type of the         |
|                  | contractor.  |
|                  | Available options are 8a Firm, Women Owned Business, etc.        |
|                  | The drop-down list displays active business types defined in the |
|                  | Business Types catalog of the library.                           |
| Subcontractor?   | Select the check box to ensure the details entered belong to the |
|                  | subcontractor.   |
| PrimeContractor? | Select the check box to ensure the details entered belong to the |
|                  | prime contractor.  |
|                  | Note: Any new company registering through New Bidder             |
|                  | Registration is considered as a Prime Contractor.                |
| Is Active        | Ensure the check box is selected to make the contractor active   |
|                  | and available for use.   |

- 5. In the **ADDRESS** section, perform the following steps:
  - a. Click Add.

The **New Address** dialog box is displayed.

| New Address           |                         | × |
|-----------------------|-------------------------|---|
| ls Default :          |                         |   |
| Use Address for Bid : | <b>~</b>                |   |
| Address 1 *:          | Address 1               |   |
| Address 2 :           | Address 2               |   |
| City *:               | Austin                  |   |
| State *:              | ТХ                      | ~ |
| Zip Code *:           | 523523                  |   |
| Phone Number *:       | 421-421-4214            |   |
| Email ID *:           | Contractor@keystone.com |   |
|                       | Save Cancel             |   |
|                       |                         | 1 |

Figure 29: New Address Dialog Box

b. Provide the appropriate information in the fields, as described in the following table:

| Field Name          | Description  |
|---------------------|--|
| ls Default          | Select the checkbox to ensure the address is marked as         |
|                     | default address for the contractor or subcontractor, as        |
|                     | applicable.  |
| Use Address for Bid | Ensure the check box is selected to use the address for        |
|                     | bidding.   |
|                     | Optionally, clear the check box to ensure the address is not   |
|                     | used for bidding.  |
| Address 1           | Enter the address of the contractor or subcontractor, as       |
| Address 2           | applicable.  |
| City                | Enter the name of the city of the contractor or subcontractor, |
|                     | as applicable.   |
| State               | Enter the name of the state of the contractor or               |
|                     | subcontractor, as applicable.                                  |
| Zip Code            | Enter the zip code of the contractor or subcontractor, as      |
|                     | applicable.  |
| Email ID            | Enter the email address of the contractor or subcontractor, as |
|                     | applicable.  |

### c. Click Save.

The address is added to the **ADDRESS** section.

- d. Optionally, perform the following steps, as applicable:
  - To edit an address, perform the following steps:
    - Select the appropriate entry, and then click Edit.
       The Edit Address dialog box is displayed.

| Edit Address          |                         |   |
|-----------------------|-------------------------|---|
| Is Default :          |                         |   |
| Use Address for Bid : |                         |   |
| Address 1 *:          | Address 1               |   |
| Address 2 :           | Address 2               |   |
| City *:               | Austin                  |   |
| State *:              | ТХ                      | ~ |
| Zip Code *:           | 523523                  |   |
| Phone Number *:       | 421-421-4214            |   |
| Email ID *:           | Contractor@keystone.com |   |
|                       | Save Cancel             |   |
|                       |                         |   |

Figure 30: Edit Address Dialog Box

- Make the necessary changes, and then click **Save**.
- To delete an address, select the appropriate entry, click **Delete**, and then click **OK**.
- 6. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

### 3.2.4. Document Management

### 3.2.4.1. Document Folder Structure

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

The **Document Folder Structure** catalog in the library enables you to create predefined folder structures and save them as templates. You can also add files to folders in these templates. Upon selecting a document template when creating a project or a contract, the folder structure and files as defined in the selected template are automatically created in the **Documents** module of the Prerequisites project or contract. You can also assign permissions and associate a workflow to each of the folders in the template that are effective when the folder structure is created automatically in a project or a contract.

You can create multiple folder structures and save these templates in the library. Each of the templates can be structured differently and can be used for various types of projects and contracts.

### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|            | LIBRARY               | LIBRARY MANAGEMENT                  |
|------------|-----------------------|-------------------------------------|
| 9          | Type to Search 🗙 🗙 🔨  | Configure Standard Tables and Items |
|            | Bidding               | Create modify library data.         |
| <b>I</b> ≟ | 🖿 Contract Management |                                     |
|            | Contractors           |                                     |
| <u>ن</u> ه | 🛅 Document Management |                                     |
| жук        | Estimate              |                                     |
|            | 🖿 Fund Management     |                                     |
|            | Notifications         |                                     |
|            | 🖿 Project Management  |                                     |
|            | 🖿 Resource Management |                                     |
|            | ■ Time Zones          |                                     |

Figure 31: Library Management

2. In the navigation pane, expand **Document Management**, and then click **Document Folder Structure**.

The **DOCUMENT FOLDER STRUCTURE** list page is displayed.

|     | LIBRARY                   | DOCUMENT FOLDER STRUCTURE     |            |            |                                       |   |
|-----|---------------------------|-------------------------------|------------|------------|---------------------------------------|---|
| Q,  | Type to Search 🗙 🗙 🔨      | 🖓 New 💬 More 🕶                |            |            | ٢                                     | T |
| 諭   | Bidding                   | Folder structure name         | Is Default | Created On | Description                           |   |
| 14  | Contract Management       | T                             |            | MM/dd/yyyy | i i i i i i i i i i i i i i i i i i i | T |
| 008 | Contractors               | CFL Project CONSTRUCTION test |            | 11/11/2023 | Records                               |   |
|     | Document Management       | Pre-Construction (Test)       |            | 10/12/2023 | PE Notebook & Awarded Contract        |   |
| ₿   | Document Folder Structure | WFL Construction Test 2       |            | 07/14/2023 | SIT WFL Construction Test 2           |   |
|     | Document Properties       | WFL Construction Test         |            | 07/14/2023 | SIT WFL Test 1                        |   |
|     | Document Type             | KP Test                       |            | 07/05/2023 | SIT Test                              |   |
|     | Estimate 🔇                | Construction Document Struct  |            | 06/20/2023 | Construction Document Structure       |   |
|     | 🖿 Fund Management         | Design & Construction         | <b>v</b>   | 06/15/2023 | Design & Construction                 |   |
|     | Notifications             |                               |            |            |                                       |   |
|     | Project Management        |                               |            |            |                                       |   |
|     | Resource Management       |                               |            |            |                                       |   |
|     | Time Zones                |                               |            |            |                                       |   |

Figure 32: List page of Document Folder Structure Form

3. Click New.

The **DOCUMENT FOLDER STRUCTURE** page is displayed.

| DOCUMENT FOLDER STRUCTURE                          |   |  |  |  |  |
|--|---|--|--|--|--|
| 🗈 Save 🏽 🛞 Cancel                                  |   |  |  |  |  |
| Document Folder Structure Name *:<br>Description : | Design & Construction Design & Construction |  |  |  |  |

Figure 33: Document Folder Structure Details Page

- 4. In the Document Folder Structure Name box, enter the name of the template.
- 5. In the **Description** box, enter the description for the folder structure.
- 6. Click Save.
- 7. To define the folder structure for the template, perform the following steps:
  - a. In the **DOCUMENT FOLDER STRUCTURE** list page, select a document template, and then click

| DOCUMENT FOLDER STRUCTURE   |                |          |   |  |            |   |            |          |  |
|---|----------------|----------|---|--|------------|---|------------|----------|--|
| 🌶 Edit 💿 View 📋 Delete 🖏 Settings 🦓 Mark Default 🖏 Undo Mark Default 💬 More |                |          |   |  |            |   |            | 💮 More 🕶 |  |
|   | Folder structu | ire name |   |  | Is Default |   | Created On |          |  |
|   |                |          | T |  |            | T | MM/dd/yyyy | <b></b>  |  |
|   | Design&Cons    | ruction  | : |  |            |   | 07/03/2024 |          |  |

Figure 34: Settings Option

The Configure Document Folder Structure page is displayed.

| CON                 | CONFIGURE DOCUMENT FOLDER STRUCTURE   |      |   |   |      |   |  |           |             |        |         |                |
|---------------------|---------------------------------------|------|---|---|------|---|--|-----------|-------------|--------|---------|----------------|
| ⊜                   | ρ                                     | Ľą.∗ | 0 | Ū | ₽, - | ē |  |           |             |        |         |                |
| DOCUME              | DOCUMENT FOLDERS Associate Workflow : |      |   |   |      |   |  |           |             | ~      |         |                |
| Design&Construction |                                       |      |   |   |      |   |  | DOCUMENTS | Permissions |        |         |                |
|                     |                                       |      |   |   |      |   |  | Document  | Title       | Author | Version | Checked Out By |
|                     |                                       |      |   |   |      |   |  |           |             |        |         |                |

Figure 35: Configure Document Folder Structure Page

b. In the **DOCUMENT FOLDERS** pane, click a folder to create a folder within the selected folder.



Figure 36: Open the Folder

c. Click **Folder**, and then click **New Folder** to add a new folder to the document template.



Figure 37: New Folder

The added folder is displayed in the **DOCUMENT FOLDERS** pane.

d. In the **DOCUMENT FOLDERS** pane, enter a name for the folder.



Figure 38: Name the Folder

Note: You cannot duplicate folder names at the same level of hierarchy.

e. To edit a folder name, or delete a folder, click the required folder, click **Folder**, and then click **Edit** 

### Folder or Delete Folder.



Figure 39: Edit or Delete the Folder

- 8. To assign a workflow to a folder, perform the following steps:
  - a. In the **DOCUMENT FOLDERS** pane, click the appropriate folder.
  - b. From the **Associate Workflow** drop-down list, select the appropriate workflow to associate with the folder.

| CON   | NFIGUR  | E DOCU | IMENT   | FOLDE | R STRU   | CTURE    |      |               |           |               |        |         |       |           |
|-------|---------|--------|---------|-------|----------|----------|------|---------------|-----------|---------------|--------|---------|-------|-----------|
| €     | Ð       | C4-    | ۲       | Ē     | <b>:</b> | <b>_</b> | ···- |               |           |               |        |         |       |           |
| росом | ENT FOL | DERS   |         |       |          |          | î    |               | Associa   | ate Workflow  | None   |         | ~     |           |
|       |         |        |         |       |          |          | L    | Inherit Parer | nt Folder | r Permissions | : 🖌    |         |       |           |
|       | Desigr  | &Cons  | tructio | n     |          |          |      | DOCUMENTS     |           |               |        |         |       |           |
| I     | 0.5     | Desigr | Corre   | spond | ence     |          |      | Docum         | ent       | Title         | Author | Version | Check | ed Out By |
|       |         |        |         |       |          |          |      |               |           |               |        |         |       |           |

Figure 40: Associate Workflow

Available options are workflows defined for the document management module.

- 9. To define permissions on a folder, perform the following steps:
  - a. In the **DOCUMENT FOLDERS** pane, select the appropriate folder.

- b. Perform either of the following steps:
- To inherit permissions from the parent folder, select the **Inherit Parent Folder Permissions** check box.
- Alternatively, to define permissions, perform the following steps:
  - i. Click **Folder**, and then click **Permissions**.



Figure 41: Folder Permissions

|                             | Create   | Edit   | View     | Delete   | Others                    |
|-----------------------------|----------|--------|----------|----------|---------------------------|
| x                           |          |        | <b>~</b> |          |                           |
| Designer                    | Create   | 🔲 Edit | View     | 🔲 Delete | 📄 Asso 📄 Creat 📄 Edit F 🚦 |
| Construction Admin Staff    | Create   | 🗹 Edit | 🖌 View   | 🖌 Delete | 🗹 Asso 🔽 Creat 🗹 Edit F 🚦 |
| Project Viewer              | Create   | 🔲 Edit | 🔽 View   | 🔲 Delete | 🚺 Asso 🚺 Creat 📘 Edit F 🚦 |
| Design Component Lead       | Create   | 🗹 Edit | 🔽 View   | 🔽 Delete | 🖌 Asso 🗹 Creat 🗹 Edit F 🚦 |
| Lead Designer               | 🔽 Create | 🛃 Edit | 🔽 View   | 🔽 Delete | 🗸 Asso 🗹 Creat 🗹 Edit F 🗄 |
| Design QA/QC                | Create   | 🔲 Edit | 🔽 View   | 🔲 Delete | 🔲 Asso 📄 Creat 📄 Edit F 🚦 |
| Highway Design Manager      | Create   | 🖌 Edit | 🖌 View   | 🔽 Delete | 🖌 Asso 🗹 Creat 🖌 Edit F 🚦 |
| Project Manager             | Create   | 🛃 Edit | 🔽 View   | 🔽 Delete | 🖌 Asso 🔽 Creat 🔽 Edit F 🚦 |
| ∕∕E Designer                | Create   | 🔲 Edit | 🔽 View   | Delete   | Asso Creat Cdit F :       |
| A/E Lead Designer           | 🔽 Create | 🛃 Edit | 🔽 View   | 🔽 Delete | 🗹 Asso 🗹 Creat 🗹 Edit F 🚦 |
| A/E Manager                 | Create   | 🖌 Edit | 🔽 View   | 🔽 Delete | 🖌 Asso 🔽 Creat 🖌 Edit F 🚦 |
| Construction Component Lead | 🗸 Create | 🔽 Edit | View     | 🔽 Delete | 🗸 Asso 🔽 Creat 🔽 Edit F 🗄 |

### The FOLDER PERMISSIONS page is displayed.

Figure 42: Document Permissions Matrix

Roles are available as rows, and permissions as columns.

- ii. Corresponding to each role, select the required check boxes to grant permissions specified in the columns.
- iii. Click Save.

- 10. To add documents to the folder structure, perform the following steps:
  - a. In the **DOCUMENT FOLDER** section, click the folder to which you want to add a file.



Figure 43: Add New Document

b. Click **New** to add a file to the selected folder. The **Masterworks** dialog box is displayed.

| SIT Testing Build- FHWA eDelivery |                            |    |  |  |  |  |
|-----------------------------------|----------------------------|----|--|--|--|--|
| Select Document *:                | Choose File No file chosen |    |  |  |  |  |
| Title :                           |                            | 1. |  |  |  |  |
| Sa                                | ve Cancel                  | ,  |  |  |  |  |

Figure 44: Masterworks Dialog Box

- c. Click **Choose File** to select the file to upload. The **Open** dialog box is displayed.
- d. Click the required file, and then click **Open**.
- e. In the **Title** box, enter the name of the file.
- f. Click Save.

# **3.2.4.2. Document Properties**

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

You can create custom document properties templates that is displayed in the **New Document** page to define additional information pertaining to documents that are managed in a project or contract.

The **Document Properties** form enables you to add attributes when uploading a document. These document attributes are used in the **Document Search** form to search for documents.

You can create multiple document properties templates with varied specifications for use in different project types. For example, a design project may require document properties that refer to the architect numbering scheme to simplify communication, while a construction project may require document properties to identify the vendor who provided the document.

You can associate a document property template to a folder in the **Documents** module and also associate document property templates to folders defined in a folder structure. The document properties as defined in the template that is selected for a folder are displayed when uploading documents to that folder.

The document properties template specification can comprise library items (stored lists), text, numbers and various other information. Additionally, you can mark fields as mandatory or optional.

You can select a document properties template when creating a project or contract, or until a document is uploaded to the **Documents** module. The document properties as defined in the template that is selected for a project or contract is displayed when uploading documents to the **Documents** module.

Characteristics of metadata specifications include:

- The **Document Properties** template selected for a project or contract cannot be changed after the first document is uploaded in a project.
- The **Document Properties** template is not applicable to attachments in forms or workflows.
- The **Document Properties** template selected for a project or contract is consistently used across the project or contract.

Defining a document properties template is similar to the functionalities available with the

### Form Builder utility in the Administration module.

The following procedure describes the steps to create a sample document properties template that is displayed when uploading a document. The sample document properties template consists of a text box to enter the document number, and a radio-button control to select the type of document.

### Steps

1. In the module menu, click **Library**. The **LIBRARY MANAGEMENT** page is displayed.

|          | LIBRARY               | LIBRARY MANAGEMENT                  |
|----------|-----------------------|-------------------------------------|
| Q,       | Type to Search 🗙 🗙    | Configure Standard Tables and Items |
| 'n       | Bidding               | Create modify library data.         |
| L.       | Contract Management   |                                     |
| :::      | Contractors           |                                     |
| <u>ن</u> | 🛅 Document Management |                                     |
|          | Estimate              |                                     |
|          | 🛅 Fund Management     |                                     |
|          | Notifications         |                                     |
|          | 🏲 Project Management  |                                     |
|          | 🛅 Resource Management | <ul> <li></li> </ul>                |
|          | Time Zones            |                                     |
|          |                       |                                     |
|          |                       |                                     |

Figure 45: Library Management

2. In the navigation pane, expand **Document Management**, and then click **Document Properties**. The **DOCUMENT PROPERTIES** list page is displayed.

|           | LIBRARY                   | DOCOMENT PROPERTIES |              |                   |                          |                          |  |  |  |
|-----------|---------------------------|---------------------|--------------|-------------------|--------------------------|--------------------------|--|--|--|
| ٩         | Type to Search 🗙 🗙 🔨      | £                   | New 😁 More 👻 |                   |                          |                          |  |  |  |
| Ô         | Bidding                   |                     | Form ID      | Form Header       | Created Date             | Last Modified Date       |  |  |  |
| 1.        | Contract Management       |                     | T            | T                 | MM/dd/yyyy h:mm tt 📅 🕤 🔽 | MM/dd/yyyy h:mm tt 🔠 🗿 🍸 |  |  |  |
| 909       | Contractors               |                     | User131      | User name         | 10/30/2023 7:05 AM       | 10/30/2023 7:07 AM       |  |  |  |
|           | Document Management       | MTRDOCM             |              | Document Metadata | 06/08/2023 8:02 AM       |                          |  |  |  |
| <u>بې</u> | Document Folder Structure |                     |              |                   |                          |                          |  |  |  |
|           | Document Properties       |                     |              |                   |                          |                          |  |  |  |
|           | Document Type             |                     |              |                   |                          |                          |  |  |  |
|           | 🖿 Estimate 🔹              |                     |              |                   |                          |                          |  |  |  |
|           | 🖿 Fund Management         |                     |              |                   |                          |                          |  |  |  |
|           | Notifications             |                     |              |                   |                          |                          |  |  |  |
|           | Project Management        |                     |              |                   |                          |                          |  |  |  |
|           | 🖿 Resource Management     |                     |              |                   |                          |                          |  |  |  |
|           | Time Zones                |                     |              |                   |                          |                          |  |  |  |

Figure 46: List Page of Document Properties Form
3. Click New.

The **GENERAL** and **DESIGN** tabs for the document properties template are displayed.

| GENERAL DESIGN   |                   |     |
|------------------|-------------------|-----|
| 🖬 Save 🏽 🕄 Cance | More 🔻            |     |
| Form ID :        | MTRDOCM           | (?) |
| Header :         | Document Metadata | (?) |
| Parent Module :  | DOCMGMT V         | ?   |
| Folder :         |                   | (?) |
|                  | li.               |     |
|                  |                   |     |
|                  |                   |     |

Figure 47: General and Design Tabs

- 4. To modify the form settings, in the GENERAL tab, perform the following steps:
  - a. In the **Form ID** box, a unique number to identify the form is displayed. Modify the form ID as required.

The form ID should contain seven alphanumeric characters.

- b. In the **Header** box, the name of the form is displayed. Modify the header information as required. Header is displayed only after you publish a form.
- c. From the **Parent Module** drop-down list, select the module in which the XML form will be placed.
- d. In the Folder box, enter the folder location where the form will be placed in the navigation tree.
  Type the complete path of the folder using the '/' separator.
  If the folder exists, then the form will be available under the existing folder.
  Otherwise, a new folder will be created, and the form will be placed under that folder.
- 5. To design the layout of the form, first create a section. A section provides a boundary in the design area to add controls.
  - a. Click the **DESIGN** tab.

| GENERAL DESIGN        |        |                       |        |            |           |              |               |
|-----------------------|--------|-----------------------|--------|------------|-----------|--------------|---------------|
| 🚡 Save 🏾 🏵 Cancel     | l⊗ Pre | eview 🗢 Undo 🗢 Redo 💮 | More 🔻 |            |           |              |               |
| GROUP LAYOUT          | •      | Project Code          | :      | Attributes | Hiera     | rchy         |               |
| Section               |        |                       |        | Filter :   | Filter th | e Attributes |               |
| Tabs Container        |        | Project Name          |        | 1          | Delete    | Edit Fields  | Group Columns |
| 🎬 Tab                 | _      |                       |        |            |           |              |               |
| SIMPLE INPUT CONTROLS | •      | Document Type         | : ~    |            |           |              |               |
| CHILD DATA CONTAINERS | •      |                       |        |            |           |              |               |
|                       |        |                       |        |            |           |              |               |

Figure 48: Design Tab

b. In the controls pane, expand **GROUP LAYOUT**, and then drag and drop **Section** to the design area.

The label **SECTION < number >** is displayed in the design area.

| GENERAL DESIGN                      |                                  |   |
|-------------------------------------|----------------------------------|---|
| Save 🛞 Cancel                       | 💽 Preview 🗢 Undo 🗢 Redo 💮 More 🗸 |   |
| GROUP LAYOUT                        | SECTION 000                      | Attributes Hierarchy  |
| Section<br>Spacer<br>Tabs Container |                                  | Filter :       Filter the Attributes         Delete       Edit Fields       Group Columns |
| 🖫 Tab                               |                                  |   |
| SIMPLE INPUT CONTROLS               | •                                | Caption : Document Proper 🕐   |
| CHILD DATA CONTAINERS               | •                                | Name: Section000 🧿  |
|                                     |                                  | HelpToolTip : 🧿   |
|                                     |                                  | HelpDescription : 🤅   |
|                                     |                                  |   |

Figure 49: Adding a Section

c. In the design area, click SECTION <number>.

The control attributes pane displays the attributes for **SECTION < number>**.

d. To define the attributes of the section, enter information in the **COMMON ATTRIBUTES** section, as described in the following table.

| Attribute       | Description                                       |
|-----------------|---|
| Caption         | This denotes the display name of the section. In  |
|                 | the Caption box, enter Document Properties.       |
| Name            | This is an automatically generated name to        |
|                 | identify the section, and need not be modified.   |
|                 | This is also the name of the column in the        |
|                 | database, and is used to derive the name of the   |
|                 | HTML item that is rendered.                       |
| HelpToolTip     | Enter the tool tip that should be displayed on    |
|                 | mouse hover on the Help ('?') icon.               |
| HelpDescription | Enter the title that should be displayed when the |
|                 | Help ('?') icon is clicked.                       |

6. To add a text box control, perform the following steps:

a. In the controls pane, click **SIMPLE INPUT CONTROLS**, and then drag and drop **Multi Line Text** into the **DOCUMENT PROPERTIES** section.

**Note:** Drop a control within the confines of the section for the control to be displayed in the design area.

### Federal Highway Administration

## b. Double-click **TextBox <number>** and enter **Document Properties**.

| GENERAL DESIGN             |  |                                  |
|----------------------------|--|----------------------------------|
| 🚡 Save 🛞 Cancel            | 💽 Preview 🗢 Undo 🗢 Redo 💮 More 🗝         |                                  |
| GROUP LAYOUT               |  | Attributes Hierarchy             |
| Section                    |  |                                  |
| 🖵 Spacer                   | TextArea 000 :                           | Filter the Attributes            |
| Tabs Container             |  | Delete Edit Fields Group Columns |
| Tab                        |  | ATTRIBUTES                       |
| SIMPLE INPUT CONTROLS      |  | Caption : Document Proper 🕐      |
| </ </ </ </ </ </li        |  | Name : TaytAraa000               |
| 🔺 Single Line Text         |  |                                  |
| A Multi Line Text          |  | HelpToolTip : 🧿                  |
| 💼 Date                     |  | HelpDescription :                |
| 1.0 Numeric                | li l |                                  |
| 1 Integer                  |  | Height : 🥐                       |
| 🛯 🗿 Time Input             |  | Width : 🧿                        |
| Time Input Picker          |  | Tuno (                           |
| 📼 Drop Down                |  | Type: TextArea V                 |
| List Box                   |  | Value : 🥐                        |
| Check Box List             |  | ReadOnly : Falco                 |
| Check Box                  |  | raise V                          |
| ©≡<br>©≡ Radio Button List |  |                                  |

Figure 50: Adding a Simple Input Control

The various attributes of the control are listed below:

| Attribute       | Description  |
|-----------------|--|
| Caption         | This denotes the display name of the control.                                |
|                 | The name to render on the display surface. If the caption is not set,        |
|                 | then the default caption is set to the <b>Name</b> attribute of the control. |
|                 | To set a control with no title, delete the caption.                          |
|                 | Enter Document Properties.   |
| Name            | This is a system generated name to denote the control. You need not          |
|                 | modify this field; however, normally a form designer provides names          |
|                 | that represent the meaning of the data in the field. Name attributes         |
|                 | should not have spaces in them, and they must be unique                      |
|                 | throughout the form.   |
|                 | The name field is used to create the underlying database column              |
|                 | name and to derive the name of the rendered HTML item.                       |
| HelpToolTip     | You can enter the tool tip that should be displayed on mouse hover           |
|                 | on the Help ('?') icon.  |
| HelpDescription | You can enter the title that should be displayed when the Help ('?')         |
|                 | icon is clicked.   |
| Width           | This is used to set the width of a control in the user interface.            |
| Туре            | This determines the options to select the type of control required in        |
|                 | the form.  |
|                 | For example, you can add a text box to a section and later change it         |
|                 | to a drop-down list.   |
| Value           | You can specify a default value to be displayed in the control.              |
|                 | Also, you can also use the Value field to retrieve system level              |
|                 | information during display processing.                                       |
|                 | The supported format values include the following:                           |
|                 | {CURRENTUSER} - Displays the user name of the logged in user.                |
|                 | {CURRENTUSERNAME} - Displays the first name of the logged in                 |
|                 | user.  |
|                 | {CURRENIDATE} - Displays the current date.                                   |
|                 | {CURRENIDATETIME} - Displays the current date and time.                      |
|                 | {CURRENTIME} - Displays the current time.                                    |
|                 | {PROJECTNAME} - Displays the name of the project.                            |
|                 | {PROJECTCODE} - Displays the project code.                                   |
|                 | {CONTRACTNAME} - Displays the name of the contract                           |
|                 | {CONTRACTCODE} - Displays the contract code.                                 |
|                 | {PRIMECONTRACTOR} - Displays the prime contractor of the project.            |
|                 | {_FORMULA: formula}  |
|                 | {_KEQUEST: STATE INTO TIELA}   |
|                 | {_UB: aD expression}   |
|                 | {_Picker: [name OF the picker that is defined in this xml]} "any static      |
| DeedOrth        | lext - Displays the data in the formalis mode words why That is the data     |
| ReadOnly        | IT SET TO TRUE, THE DATA IN THE FORM IS MADE READ ONLY. That is, the data    |
|                 | I Cannot de modified dy the end user.  |

| Attribute | Description  |
|-----------|--|
| MaxLength | Sets the maximum number of characters that can be entered in the |
|           | text box.  |

7. To specify the document type in the properties template, perform the following steps:

a. In the controls pane, click **SIMPLE INPUT CONTROLS**, and then drag and drop **Radio Button List** into the **DOCUMENT PROPERTIES** section.

b. Click the **Radio Button List** group.

The attribute pane displays the radio button control attributes.

| GENERAL DESIGN                                   |                                |  |  |  |  |  |  |  |
|--|--------------------------------|--|--|--|--|--|--|--|
| 🗈 Save 🛞 Cancel 🔄 Preview 🗢 Undo 🗢 Redo 💮 More 🗸 |                                |  |  |  |  |  |  |  |
| Spacer ADDCLIMENT PROPERTIES                     |                                |  |  |  |  |  |  |  |
| Tabs Container                                   |                                |  |  |  |  |  |  |  |
| Tab Document Properties :                        | Filter : Filter the Attributes |  |  |  |  |  |  |  |
| SIMPLE INPUT CONTROLS                            | Delay Produkt Course Colored   |  |  |  |  |  |  |  |
| Auto Generated                                   | Belete For Helds Group Columns |  |  |  |  |  |  |  |
| Single Line Text RadioButtonList 000 :  Option 1 | Option 2 ATTRIBUTES            |  |  |  |  |  |  |  |
| A Multi Line Text                                | Caption : Document Type 🔇      |  |  |  |  |  |  |  |
| 📅 Date   | Name : RadioButtonList0( 🔞     |  |  |  |  |  |  |  |
| 1.0 Numeric                                      |                                |  |  |  |  |  |  |  |
| 1 Integer  | Неіртооітір : ()               |  |  |  |  |  |  |  |
| Time Input                                       | HelpDescription : 🕧            |  |  |  |  |  |  |  |
| Time Input Picker                                | Width (3)                      |  |  |  |  |  |  |  |
| 💌 Drop Down                                      |                                |  |  |  |  |  |  |  |
| List Box   | Type : RadioButtonList 🗸 🔇     |  |  |  |  |  |  |  |
| 📇 Check Box List                                 | Value : 🦷 👔                    |  |  |  |  |  |  |  |
| Check Box  |                                |  |  |  |  |  |  |  |
| 🐣 Radio Button List                              | DataSource : (2)               |  |  |  |  |  |  |  |
| Formatted Input                                  | ReadOnly: False 🗸 👔            |  |  |  |  |  |  |  |
| Password   |                                |  |  |  |  |  |  |  |

Figure 51: Adding a Radio Button

- c. In the **Attributes** pane, in the **Caption** attribute, type **Document Type**.
- d. In the Attributes pane, in the DataSource, click .

The **Data Source Editor** dialog box is displayed.

i. In the **ListItems** box, for an additional radio button, click **Add**.

| ii. | In the Display column, enter Specifications for Option 1, Design for Option 2, and |
|-----|--|
|     | Contract for Option 3.   |

| Data Source Editor | r     |                      |    |          |              |   |                |             | - |   | ×   |
|--------------------|-------|----------------------|----|----------|--------------|---|----------------|-------------|---|---|-----|
| ListItems : 🧿      | Add   | Display              |    | Valu     | е            |   |                |             |   |   |     |
|                    |       | Specifications       |    | Option 1 |              | ۲ |                |             |   |   |     |
|                    |       | Design               |    | Option 2 |              | ۲ |                |             |   |   |     |
|                    |       | Contract             |    |          |              | ۲ | •              |             |   |   |     |
|                    |       |                      |    |          |              |   |                |             |   |   |     |
| Select a Module :  | Selec | t a Module to ge     | •  |          |              |   |                |             |   |   |     |
| Select a Form :    | Selec | t a form             | •  |          |              |   |                |             |   |   |     |
| Select Display :   | Selec | t an item to disp    | •  |          | Select Value | : | Select a va    | lue for Dis |   | • |     |
| Filter Field :     | Selec | t a Filter Field     | •  |          | Condition    | : | Enter a filter | r condition |   |   | (?) |
| Sort based on :    | Selec | t a field to sort by | •  |          |              |   |                |             |   |   |     |
| Query String       |       |                      |    |          |              |   |                |             |   |   |     |
|                    |       |                      |    |          |              |   |                |             |   |   |     |
|                    |       |                      |    |          | •            |   |                |             |   |   | 1.  |
|                    |       |                      | Ok | Cancel   |              |   |                |             |   |   |     |

Figure 52:Defining Display Values

Note: For newly added radio buttons, you must enter both the Display and Value.

- iii. Click **OK**.
- 8. Click Save.

The **DOCUMENT PROPERTIES** list page is displayed.

- 9. You must publish the properties template to make it available for selection in projects and contracts. To publish the template, perform the following steps:
  - a. In the list page, select the properties template to be published.
  - b. Click **Publish**.

| DO | DOCUMENT PROPERTIES |      |                   |   |                               |   |                          |
|----|---------------------|------|-------------------|---|-------------------------------|---|--------------------------|
| _0 | Edit 💿 View         | 🔟 De | lete 훅 Publish    | D | Associate Document Folder 🛛 🍣 | M | ark Default 💮 More 🔻     |
|    | Form ID             |      | Form Header       |   | Created Date                  |   | Last Modified Date       |
|    |                     | T    |                   | T | MM/dd/yyyy h:mm tt 📅 Ö        | ] | MM/dd/yyyy h:mm tt 📅 🗿 📘 |
|    | User131             |      | User name         |   | 10/30/2023 7:05 AM            |   | 10/30/2023 7:07 AM       |
|    | MTRDOCM             | :    | Document Metadata |   | 06/08/2023 8:02 AM            |   |                          |
|    |                     |      |                   |   |                               |   |                          |

Figure 52: Publish the Document Property

A confirmation message is displayed.

On creating a new project, the published document properties template can be selected. When adding a new document to the project, the properties template is displayed.

## 3.2.4.3. Associating Document Property Templates to Folders in a Folder Structure

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission</u> <u>Matrix</u>

### Overview

You can associate a document property template to folders defined in a folder structure.

### Steps

1. In the module menu, click Library.

|            | LIBRARY               | LIBRARY MANAGEMENT                  |
|------------|-----------------------|-------------------------------------|
| Q,         | Type to Search X 🗙    | Configure Standard Tables and Items |
|            | The Bidding           | Create modify library data.         |
| <b>∐</b> ≟ | Contract Management   |                                     |
|            | Contractors           |                                     |
| Ô          | 🛅 Document Management |                                     |
|            | Estimate              |                                     |
|            | 🖿 Fund Management     |                                     |
|            | Notifications         |                                     |
|            | 🖿 Project Management  |                                     |
|            | 🖿 Resource Management |                                     |
|            | Time Zones            |                                     |
|            |                       |                                     |
|            |                       |                                     |

Figure 53: Library Management

2. In the navigation pane, expand **Document Management**, and then click **Document Properties**.

The **DOCUMENT PROPERTIES** list page is displayed.

| LIBRARY    |                                   | DOCUMENT PROPERTIES |                   |                          |                          |  |  |  |
|------------|-----------------------------------|---------------------|-------------------|--------------------------|--------------------------|--|--|--|
| Search X X |                                   | ♣ New 💮 More 🕶      |                   |                          |                          |  |  |  |
| 諭          | 🖿 Bidding                         | Form ID             | Form Header       | Created Date             | Last Modified Date       |  |  |  |
| 1.         | Contract Management               |                     |                   | MM/dd/yyyy h:mm tt 🔠 🗿 📘 | MM/dd/yyyy h:mm tt 📅 🗿 🍸 |  |  |  |
| mA         | Contractors                       | User131             | User name         | 10/30/2023 7:05 AM       | 10/30/2023 7:07 AM       |  |  |  |
| 1000       | 📩 Document Management             |                     | Document Metadata | 06/08/2023 8:02 AM       |                          |  |  |  |
| Yek.       | Document Folder Structure         |                     |                   |                          |                          |  |  |  |
|            | Document Properties               |                     |                   |                          |                          |  |  |  |
|            | <ul> <li>Document Type</li> </ul> |                     |                   |                          |                          |  |  |  |
|            | 🖿 Estimate <                      |                     |                   |                          |                          |  |  |  |
|            | 🖿 Fund Management                 |                     |                   |                          |                          |  |  |  |
|            | Notifications                     |                     |                   |                          |                          |  |  |  |
|            | 🖿 Project Management              |                     |                   |                          |                          |  |  |  |
|            | 🖿 Resource Management             |                     |                   |                          |                          |  |  |  |
|            | Time Zones                        |                     |                   |                          |                          |  |  |  |

Figure 54: List Page of Document Properties Form

3. Select the required document property, and then click Associate Document Folder.

| DO | DOCUMENT PROPERTIES |     |                   |   |                           |                  |               |               |
|----|---------------------|-----|-------------------|---|---------------------------|------------------|---------------|---------------|
| _0 | Edit 💿 View         | D D | elete 🋜 Publish   | Þ | Associate Document Folder | К <sub>о</sub> л | lark Default  | 💬 More 🔹      |
|    | Form ID             |     | Form Header       |   | Created Date              |                  | Last Modified | d Date        |
|    |                     | T   |                   |   | MM/dd/yyyy h:mm tt        |                  | MM/dd/yyyy    | himm tt 📅 🗿 📘 |
|    | User131             |     | User name         |   | 10/30/2023 7:05 AM        |                  | 10/30/2023 7  | :07 AM        |
|    | MTRDOCM             | :   | Document Metadata |   | 06/08/2023 8:02 AM        |                  |               |               |

Figure 55: Selecting Document Folder

#### The Associate Document Folder dialog box is displayed.

| Associate Document Folder  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
| Folder Structure       :       Design & Construction       ~   |  |  |  |  |  |  |
| Document Folders   |  |  |  |  |  |  |
| Design & Construction     Design Correspondence     Design Submittals     Construction Correspondenc     Construction Submittals |  |  |  |  |  |  |
| Save Cancel  |  |  |  |  |  |  |

Figure 56: Associate Document Folder Dialog Box

4. From the **Folder Structure** drop-down list, select the folder structure to associate the selected document property template.

Available options are folder structures defined in the **Document Folder Structure** catalog of the library.

The folders defined in the selected document folder structure is displayed in the **Document Folders** section.

- 5. Select the required folders to associate the selected folder property template.
- 6. Click Save.

You must publish the properties template to make it available for selection in projects and contracts.

- 7. In the **DOCUMENT PROPERTIES** list page, select the properties template form to be published.
- 8. Click Publish.

| DO | DOCUMENT PROPERTIES |      |                |     |                           |                          |
|----|---------------------|------|----------------|-----|---------------------------|--------------------------|
| _0 | Edit 💿 View         | 💼 De | elete 🛜 Publis | h 🗔 | Associate Document Folder | Mark Default 💮 More 💌    |
|    | Form ID             |      | Form Header    |     | Created Date              | Last Modified Date       |
|    |                     |      |                | T   | MM/dd/yyyy h:mm tt 🔠 Ö 🝸  | MM/dd/yyyy h:mm tt 📅 🗿 🍸 |
|    | User131             |      | User name      |     | 10/30/2023 7:05 AM        | 10/30/2023 7:07 AM       |
|    | MTRDOCM             | ÷    | Document Metad | ata | 06/08/2023 8:02 AM        |                          |
|    | 1                   |      |                |     |                           |                          |

Figure 57: Publish the Document Property

A confirmation message is displayed.

You can choose the applicable **Document Folder Structure** when creating a project or contract. You need to enter all the metadata information at the time of document upload to a folder that has been associated to a **Document Properties** template.

# 3.2.5. Estimate

## 3.2.5.1. Construction Inflation Indices

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

The **Construction Inflation Indices** catalog enables you to define distinct inflation indices.

The defined inflation index is used to calculate the inflation percentage (%) in the **Unit Price Search** utility.

## Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|   | LIBRARY               |            |                                     |
|---|-----------------------|------------|-------------------------------------|
| 9 | Type to Search        | <b>×</b> ∧ | Configure Standard Tables and Items |
|   | Bidding               |            | Create modify library data.         |
| 朣 | Contract Management   |            |                                     |
|   | Contractors           |            |                                     |
| - | 🖿 Document Management |            |                                     |
| ~ | 🗖 Estimate            |            |                                     |
|   | 🖿 Fund Management     |            |                                     |
|   | Notifications         |            |                                     |
|   | 🛅 Project Management  |            |                                     |
|   | 🛅 Resource Management | ۲          |                                     |
|   | Time Zones            |            |                                     |
|   |                       |            |                                     |
|   |                       |            |                                     |

Figure 58: Library Management

2. In the navigation pane, expand **Estimate**, and then click **Construction Inflation Indices**. The **CONSTRUCTION INFLATION INDICES** list page is displayed.

|                        | LIBRARY                        | CONSTRUCTION INFLATION INDICES                     |           |  |  |  |  |
|------------------------|--------------------------------|--|-----------|--|--|--|--|
| 🤉 Type to Search 🗙 🔨 🔨 |                                | New 🖹 Reports - 📴 Excel Import / Export - 💬 More - |           |  |  |  |  |
| 俞                      | 🖿 Bidding                      | Inflation Index Name                               | Is Active |  |  |  |  |
| <b>Li</b>              | Contract Management            |  |           |  |  |  |  |
| nn <sup>®</sup>        | Contractors                    | Colorado DOT CCI                                   | <b>v</b>  |  |  |  |  |
| **                     | 🗖 Document Management          | California Highway CCI                             |           |  |  |  |  |
| Ω.                     | Estimate                       | 2.0 National Highway CCI                           |           |  |  |  |  |
|                        | Bridge Construction Type       | BLS Non-Residential Construction                   |           |  |  |  |  |
|                        | Construction Inflation Indices |  |           |  |  |  |  |
|                        | Schedule Construction Type     |  |           |  |  |  |  |
|                        | 🛅 Fund Management              |  |           |  |  |  |  |
|                        | Notifications                  |  |           |  |  |  |  |
|                        | 🎦 Project Management           |  |           |  |  |  |  |
|                        | Resource Management            |  |           |  |  |  |  |
|                        | Time Zones                     |  |           |  |  |  |  |



3. Click New.

### The **CONSTRUCTION INFLATION INDICES** page is displayed.

| CONS | CONSTRUCTION INFLATION INDICES   |   |                  |  |  |  |  |  |
|------|--|---|------------------|--|--|--|--|--|
| 📑 Sa | 🔂 Save & Exit 🚺 Save & Continue 🛞 Cancel   |   |                  |  |  |  |  |  |
| INFL | Inflation Index Name *: Colorado DOT CCI<br>Is Active : 🗹<br>INFLATION RATES TABLE |   |                  |  |  |  |  |  |
|      | Year   | T | Inflation Rate 🝸 |  |  |  |  |  |
|      | 1997   |   | 535.5            |  |  |  |  |  |
|      | 1998   |   | 606.5            |  |  |  |  |  |
|      | 1999   |   | 610.7            |  |  |  |  |  |
|      | 2000   |   | 654.8            |  |  |  |  |  |
|      | 2001   |   | 601.5            |  |  |  |  |  |
|      | 2002   |   | 575.8            |  |  |  |  |  |
|      | 2003   |   | 592.3            |  |  |  |  |  |
|      | 2004   |   | 644.5            |  |  |  |  |  |
|      | 2005   |   | 979.0            |  |  |  |  |  |
|      | 2006   |   | 980.1            |  |  |  |  |  |
| Add  | Delet  | e |                  |  |  |  |  |  |

Figure 60: Construction Inflation Indices Details Page

4. Provide the appropriate information in the fields, as described in the following table:

| Field Name           | Description  |
|----------------------|--|
| Inflation Index Name | Enter the name of the inflation index.                       |
| Is Active            | Ensure the check box is selected to make the inflation index |
|                      | active and available for use in project.                     |

- 5. To add an inflation rate, in the INFLATION RATES TABLE section, perform the following steps:
  - a. Click Add.

A row is added to the table.



Figure 61: Inflation Rates Table

b. Provide the appropriate information in the fields, as described in the following table:

| Column Name | Description  |
|-------------|--|
| Year        | From the drop-down list, click and select the      |
|             | appropriate year. Available years are from 1995 to |
|             | 2024   |

| Column Name    | Description   |  |
|----------------|---|--|
| Inflation Rate | Enter the rate of inflation.  |  |
|                | Optionally, use the button to increase or decrease the value entered. |  |
|                | Note: To enter negative inflation rate, prefix the                    |  |
|                | value with a - sign.  |  |

- 6. Optionally, to delete an inflation rate, in the **INFLATION RATES TABLE** section, perform the following steps:
  - a. Select the check box adjacent to the appropriate entry.
  - b. Click **Delete**, and then click **OK**.
- 7. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.2.6. Notifications

## 3.2.6.1. Mail Merge Process

The **Mail Merge** feature enables you to use the information available in a form into a predefined document template to create documents with dynamic values.

You can design a mail merge document and create mail merge templates and email body templates.

You can design a mail merge document in Microsoft Word format with objects that are placeholders to include specific form information.

You can then create a mail merge template by uploading the designed mail merge document. The mail merge template is configured for a form by mapping the objects in the mail merge document with the fields in the form.

When the mail merge document is sent to the configured recipients, the mapped objects are replaced with the actual field values defined in the selected record of the form. The mail merge document is sent as an email attachment to the recipients. You can also attach the mail merge document to a record of the associated form.

You can also design an email body template by defining the subject and message for the email notifications. These mail body templates are used when sending emails to recipients.



Figure 63: Mail Merge Process Overview

### The functional flow for mail merge is as follows:

- 1. <u>3.2.6.2. Create mail merge documents with objects</u>
- 2. 3.2.6.3. Create mail merge templates
- 3. 3.2.6.4. Configure mail merge for a form
- 4. 3.2.6.5. Create mail body templates

## 3.2.6.2. Creating Mail Merge Documents

### Overview

A mail merge document is created in Microsoft Word format with objects that are placeholders to include specific information of a record of a form. This document is then associated with a mail merge template, configured for a record of a form, and sent as an email attachment to the recipients.

### Steps

- 1. Open a new document in Microsoft Word.
- 2. Enter the appropriate content for the mail merge document.
- 3. Place the cursor where you want to insert an object as a placeholder for the actual content of the form.

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4. On the Insert tab, in the Text group, click Quick Parts, and then click Field.





## The Field dialog box is displayed.

| Field  |   | ? X  |
|--|---|--|
| Please choose a field  | Field properties                                  | Field options                                |
| <u>C</u> ategories:  | Field name:                                       | Text to be inserted <u>b</u> efore:          |
| (All)  | Transaction date                                  | Text to be inserted after:                   |
| <u>F</u> ield names:   | Forma <u>t</u> :                                  | Text to be inserted after.                   |
| LastSavedBy<br>Link<br>ListNum<br>MacroButton  | (none)<br>Uppercase<br>Lowercase<br>First capital | ☐ <u>M</u> apped field ☐ Vertical formatting |
| MergeRec<br>MergeSeq<br>Next<br>NextIf<br>NoteRef<br>NumChars<br>NumPages<br>NumWords<br>Page<br>PageRef | The case  |  |
| Print<br>PrintDate<br>Private  |   | ✓ Preserve formatting during updates         |
| Description:<br>Insert a mail merge field  |   |  |
| Field Codes  |   | OK Cancel                                    |

Figure 63: Field Dialog Box

- 5. In the FieldNames list, click MergeField.
- 6. In the Field name field, enter the name of the object.
- 7. Click **OK**.

The object is inserted in the document.

8. Click Save.

## 3.2.6.3. Mail Merge Templates

### Prerequisites

- The role of the logged-in user must be one of the following:
  - o Administrator
  - Construction Component Lead
     For more information on role-specific permissions, refer to <u>Table 1 Library Catalog</u>
     <u>Permission Matrix</u>
- Mail merge document in the Word format is available.

## Overview

A mail merge template is created by uploading the Word format of the mail merge document.

### Steps

1. In the module menu, click Library.

|                      | LIBRARY               |   |                                     |
|----------------------|-----------------------|---|-------------------------------------|
| C Type to Search X X |                       |   | Configure Standard Tables and Items |
|                      | Bidding               |   | Create modify library data.         |
| 朣                    | 🛅 Contract Management |   |                                     |
|                      | Contractors           |   |                                     |
| <u>ن</u> ه           | 🛅 Document Management |   |                                     |
| ~~                   | 🛅 Estimate            |   |                                     |
|                      | 🖿 Fund Management     |   |                                     |
|                      | Notifications         |   |                                     |
|                      | 🖿 Project Management  |   |                                     |
|                      | 🖿 Resource Management | < |                                     |
|                      | Time Zones            |   |                                     |
|                      |                       |   |                                     |
|                      |                       |   |                                     |



2. In the navigation pane, expand Notifications, and then click Mail Merge Templates.

The MAIL MERGE TEMPLATES list page is displayed.

|     | LIBRARY                   | MAIL MER   | GETEMPLATES |          |             |            |
|-----|---------------------------|------------|-------------|----------|-------------|------------|
| ٩.  | Type to Search 🗙 🗙 🔨      | Dew        | 📋 Reports 🔻 | 💮 More 🕶 |             |            |
|     | Bidding                   | 0          | Name        |          | Description | Created By |
| 1a  | 🛅 Contract Management     |            |             | T        |             | T          |
| nnA | Contractors               | No records | to display. |          |             |            |
|     | 🛅 Document Management     |            |             |          |             |            |
| 141 | Estimate                  |            |             |          |             |            |
|     | 🗖 Fund Management         |            |             |          |             |            |
|     | T Notifications           |            |             |          |             |            |
|     | Mail Body Templates       |            |             |          |             |            |
|     | Mail Merge Configurations |            |             |          |             |            |
|     | Mail Merge Templates      |            |             |          |             |            |
|     | Project Management        |            |             |          |             |            |
|     | 🛅 Resource Management     |            |             |          |             |            |
|     | Time Zones                |            |             |          |             |            |

Figure 65: List page of Mail Merge Templates Form

3. Click New.

The MAIL MERGE TEMPLATES details page is displayed.

| L Lo Save a Cl | Name *: Project Fi  | und Transaction   |  |  |  |
|----------------|---------------------|---|--|--|--|
| N<br>Descri    | Name *: Project Fo  | und Transaction<br>und Transaction  |  |  |  |
| N<br>Descri    | Name *: Project Fi  | und Transaction<br>und Transaction  |  |  |  |
| Descri         | ption : Project Fo  | und Transaction   |  |  |  |
| Descri         |                     |   |  |  |  |
|                |                     |   |  |  |  |
| NTS            |                     |   |  |  |  |
|                |                     |   |  |  |  |
|                |                     |   |  |  |  |
|                |                     |   |  |  |  |
| View Status    | Document Name       | Title   | Uploaded B   | by Uploaded  | Date File Size   |
|                | Project Fund        |   |  |  |  |
|                | Transaction Appro   | val Project Fund  | le   | 07/03/2024   | 4:33 AM 13 KB  |
|                | Receipt.docx        |   |  |  |  |
|                |                     |   |  |  |  |
|                | :NTS<br>View Status | View Status Document Name<br>Project Fund<br>Transaction Approv<br>Receipt.docx | View Status Document Name Title<br>Project Fund<br>Transaction Approval<br>Receipt.docx Project Fund | View Status Document Name Title Uploaded E<br>Project Fund<br>Transaction Approval<br>Receipt.docx | In S     Document Name     Title     Uploaded By     Uploaded       Project Fund     Transaction Approval     Project Fund     07/03/2024       Receipt.docx     Project Fund     07/03/2024 |

Figure 66: Mail Merge Templates Details Page

- 4. In the Name field, enter the name of the mail merge template.
- 5. In the **Description** field, enter the description about the mail merge template.
- 6. In the **ATTACHMENTS** section, upload the mail merge document. For information on attachments, refer to <u>Section 4.1. Attachments</u>.
- 7. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

## 3.2.6.4. Mail Merge Configuration

### Prerequisites

- Mail merge templates for a form are available in the Mail Merge Templates catalog of the library.
- The role of the logged-in user must be one of the following:
  - o Administrator
  - Construction Component Lead
     For more information on role-specific permissions, refer to <u>Table 1 Library Catalog</u>
     <u>Permission Matrix</u>
- The logged-in user should be invited to the project and assigned with the edit permission.

### Overview

You can configure **Mail Merge** for a form by associating the required fields of the form with the objects of the mail merge template.

When email notifications are sent, the mail merge document is sent as an attachment. In the attachment, the mapped objects in the mail merge template are replaced with the actual field values defined in the selected record of the form.

### Steps

1. In the module menu, click Library.



Figure 67: Library Management

2. In the navigation pane, expand **Notifications**, and then click **Mail Merge Configuration**. The **MAIL MERGE CONFIGURATION** list page is displayed.

|     | LIBRARY                   | MA | IL MEF | GE CONFIGURATIONS |   |                 |
|-----|---------------------------|----|--------|-------------------|---|-----------------|
| 0   | Type to Search 🗙 🗙 🔨      | Ð  | New    | 💮 More 🕶          |   |                 |
|     | Bidding                   |    | Nam    | e                 |   | Associated Form |
| 朣   | 🛅 Contract Management     |    |        |                   | T |                 |
| nn: | Contractors               |    | ecords | to display.       |   |                 |
|     | Document Management       |    |        |                   |   |                 |
| УØV | Estimate                  |    |        |                   |   |                 |
|     | 🖿 Fund Management         |    |        |                   |   |                 |
|     | Notifications             |    |        |                   |   |                 |
|     | Mail Body Templates       |    |        |                   |   |                 |
|     | Mail Merge Configurations |    |        |                   |   |                 |
|     | Mail Merge Templates      |    |        |                   |   |                 |
|     | 🖿 Project Management      |    |        |                   |   |                 |
|     | 🖿 Resource Management     |    |        |                   |   |                 |
|     | Time Zones                |    |        |                   |   |                 |

Figure 68: List Page of Mail Merge Configuration Form

### 3. Click New.

## The MAIL MERGE CONFIGURATION page is displayed.

| Nam<br>Docume                     | Project Fund Transaction     Project Fund Transaction App |   | Form <sup>°</sup><br>Template | <ul> <li>Project Fund Transaction</li> <li>Project Fund Transaction</li> </ul> |
|-----------------------------------|---|---|-------------------------------|--|
| ifiguration                       |   |   |                               |  |
| ojects                            | Fields  |   | Layout                        |  |
| ransaction ID" \* MERGEFORMAT     | Transaction ID  | ~ | Comma Separated               | ▼  |
| ransaction Date" \*<br>ERGEFORMAT | Transaction Date  | ~ | Comma Separated               | <b>•</b>   |
| mount in \$" \* MERGEFORMAT       | Amount in \$  | ~ | Comma Separated               | <b>~</b>   |

Figure 69: Mail Merge Configuration Details Page

4. In the **Name** box, enter the name for the configuration.

- 5. Corresponding to the **Document** box, perform the following steps to associate a mail merge template:
  - a. Click 🔤 .

The **Select a template** dialog box is displayed.

| Select a template                                 |                          |  |            | ×          |
|---|--------------------------|--|------------|------------|
| Document Name                                     | Template Name            | Description                                  | Created By | Created On |
| Project Fund Transaction<br>Approval Receipt.docx | Project Fund Transaction | Project Lund Transaction<br>Approval Receipt |            | 07/03/2024 |
|   |                          | OK Cancel                                    |            |            |

Figure 70: Select a Template

Available options are mail merge documents defined in mail merge templates in the **Mail Merge Templates** catalog of the library.

b. Click the required template, and then click **OK**.

The template name associated with the selected mail merge document is displayed in the **Template** box, and the objects in selected mail merge document are listed in the **Configuration** section.

- 6. From the **Form** drop-down list, select the form for which you want to configure mail merge.
- 7. To configure the data source for mail merge, in the **Source** field, perform either of the following steps:
  - Configure mail merge for a single form:
    - a. Click Form (By default, the option Form is selected).
       In the Configuration section, all the fields associated with the form selected in the Form field

are listed.Configure mail merge for a multiple form:

a. Click View.

The **View** field is displayed.

- b. From the View drop-down list, select the view for which you want to configure mail merge.
  Views are predefined in the system that fetches information from multiple forms.
  Available options are views pertaining to the selected form.
  In the Configuration section, all the fields of the forms defined in the selected View and the fields associated with the form selected in the Form field are listed.
- 8. In the **Configuration** section, all the objects associated with the selected mail merge template are listed. To define the fields and layouts for the objects, perform the following steps:
  - a. Corresponding to the row of the required object, click in the **Fields** column, and from the dropdown list, select the required field to map the objects with the fields of the form.
  - b. Corresponding to the row of the required object, click in the **Layout** column, and from the dropdown list, select the required option to separate the objects in the mail merge document.
- 9. To send the mail merge document as a PDF, select the **Convert to PDF** check box. If the check box is cleared, then the mail merge document is sent in the Word format.
- 10. Click Save.

## 3.2.6.5. Mail Body Templates

## Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission</u> <u>Matrix</u>

### **Overview**

You can configure email messages that are sent from forms, and save the templates in the **Mail Body Templates catalog** of the library.

You can configure the content of the subject and the body of the email. Also, you can add fields of the associated form as placeholders to the subject and body of the email. The content of these placeholders is replaced with the actual values from the form when the mail merge, workflow, or Ball in Court notification from the form is sent to configured users.

## Steps

1. In the module menu, click Library.



Figure 71: Library Management

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2. In the navigation pane, expand Notifications, and then click Mail Body Templates.

The MAIL BODY TEMPLATES list page is displayed.

|            | LIBRARY                                       | MAIL BODY TEMPLATES          |                    |               |
|------------|---|------------------------------|--------------------|---------------|
| Q,         | Type to Search 🗙 🗙 🔨                          | 🗘 New 🗎 Reports 👻 💱 Excel Ex | kport 🔹 💬 More 👻   |               |
|            | Bidding                                       | Name                         | Associated Form    | Created By    |
| 1.         | 🛅 Contract Management                         | T                            | Т                  |               |
| 908        | Contractors                                   | SubmittalToSubmit            | Submittals         | Administrator |
|            | Document Management                           | AdvertisementEEUpdated       | Advertisement      | Administrator |
| <u>(8)</u> | 🖿 Estimate                                    | AdvertisementPendingEERevisi | Advertisement      | Administrator |
|            | 🖿 Fund Management                             | AmendmentPendingRevision     | Amendment          | Administrator |
|            | Notifications                                 | AmendmentEEUpdated           | Amendment          | Administrator |
|            | Mail Body Templates                           | EEMailTemplate2              | Engineers Estimate | Administrator |
|            | <ul> <li>Mail Merge Configurations</li> </ul> | EEMailTemplate               | Engineers Estimate | Administrator |
|            | Mail Merge Templates                          | MOMInviteeEmailTemplate      | Minutes Of Meeting | Administrator |
|            | 🖿 Project Management                          | MOMOrganizerEmailTemplate    | Minutes Of Meeting | Administrator |
|            | Resource Management                           | SubmittalDiscussionResponse  | Submittals         | Administrator |
|            | Time Zones                                    | SubmittalDiscussionRecallTem | Submittals         | Administrator |

Figure 72: List Page of Mail Body Templates Form

### 3. Click New.

The MAIL BODY TEMPLATES details page is displayed.

| MAIL BODY TEMPLATES  |   |  |  |  |  |  |  |
|--|---|--|--|--|--|--|--|
| 🗟 Save & Exit  | Save & Continue 🏽 🛞 Cancel                                    |  |  |  |  |  |  |
| Name *: Pr   | roject Fund Transaction                                       |  |  |  |  |  |  |
| Form : Pr  | Project Fund Transaction                                      |  |  |  |  |  |  |
| Subject *: A   | Approval Receipt  |  |  |  |  |  |  |
| Message *:   | Paragraph $B I U \equiv \Xi \equiv \Xi \Xi \Box = \Xi = \Box$ |  |  |  |  |  |  |
| Hi < <form_currentuserfullname>&gt;<br/>The Project Fund Transaction record &lt;<transactionid>&gt; with &lt;<amount>&gt; is approved.</amount></transactionid></form_currentuserfullname> |   |  |  |  |  |  |  |
| T  | Thank you   |  |  |  |  |  |  |

Figure 73: Mail Body Templates Details Page

4. In the **Name** field, enter the name of the email body template.

- 5. In the **Forms** field, perform the following steps to select the form for which the email body template is being created.
  - a. Click .

The Forms Picker dialog box is displayed listing all the forms in the application.

| Forms Picker                      | ×                   |
|-----------------------------------|---------------------|
| Form                              | T                   |
| Add Standard Table                | 4                   |
| Additional Permissions Setup      |                     |
| Ad-Hoc Unit Price Search Result   |                     |
| Adjustments                       |                     |
| Advertisement                     |                     |
| Amendment                         |                     |
| Amendment Types                   |                     |
| Application Settings              |                     |
| Area of Work Affected             |                     |
| Attachment List Template          |                     |
| Authentication & Login Settings   |                     |
| Auto Invite                       |                     |
| Auto Invite                       |                     |
| Bid Estimate Details              |                     |
| Rid Estimate Information Settings | 1 - 40 of 187 items |
| Select Cancel                     |                     |

Figure 74: Forms Picker Dialog Box

- b. Select the required form.
- c. Click Select.

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6. In the **Subject** box, enter the subject of the email body template.

You can also add fields from the selected form to the subject line as placeholders. The field placeholders are later replaced with actual values from the form when notifications are sent from the form. To add field placeholders, perform the following steps:

a. Click .

The Fields Picker dialog box is displayed.

| Fields Picker                  |                    | × |
|--------------------------------|--------------------|---|
| Field                          |                    | T |
| Amount in \$                   |                    |   |
| Current Date                   |                    |   |
| Current User                   |                    |   |
| Current User Full Name         |                    |   |
| Form Key                       |                    |   |
| Form Name                      |                    |   |
| Fund Description               |                    |   |
| Fund Source Category           |                    |   |
| Fund Source Name               |                    |   |
| Password Expiry Date           |                    |   |
| Project Code                   |                    |   |
| Project Name                   |                    |   |
| Record Identifier              |                    |   |
| Record Identifier With Caption |                    |   |
| Record Link                    |                    | - |
| 40 ▼ items                     | 1 - 31 of 31 items | C |
| Select Cancel                  |                    |   |
|                                |                    |   |

Figure 75: Field Picker Dialog Box

Available options are fields of the selected form.

b. Click the required field, and then click **Select**.

The selected field is added to the Subject line.

When a notification email is sent from the selected form, the field placeholders are replaced with the actual field values of the selected form.

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7. In the Message box, enter the content of the email body for the template.

You can also format the message using the formatting tool bar available in the box. You can also add fields from the selected form to the message body as placeholders. The field placeholders are later replaced with actual values from the form when notifications are sent from the form. To add field placeholders, perform the following steps:

a. Click .

The Fields Picker dialog box is displayed.

| Fields Picker                  | ×                  |
|--------------------------------|--------------------|
| Field                          | T                  |
| Amount in \$                   | 4                  |
| Current Date                   |                    |
| Current User                   |                    |
| Current User Full Name         |                    |
| Form Key                       |                    |
| Form Name                      |                    |
| Fund Description               |                    |
| Fund Source Category           |                    |
| Fund Source Name               |                    |
| Password Expiry Date           |                    |
| Project Code                   |                    |
| Project Name                   |                    |
| Record Identifier              |                    |
| Record Identifier With Caption |                    |
| Record Link                    | 1 - 31 of 31 items |
| Select Cancel                  |                    |

Figure 76: Field Picker Dialog Box

Available options are fields of the selected form.

- b. Click the required field, and then click Select.
  The selected field is added to the message of the email.
  When a notification email is sent from the selected form, the field placeholders are replaced with the actual field values of the selected form.
- 8. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.2.7. Project Management

## 3.2.7.1. Additional Permissions Setup

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

The **Additional Permissions Setup** catalog enables you to provide permissions to only certain roles for editing and viewing specific information about the project.

By providing additional permissions to certain roles for viewing details such as probables, funding summary, private bids, and editing project-related details, confidentiality pertaining to specific information about the project is maintained.

### Steps

1. In the module menu, click **Library**.



Figure 77: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Additional Permissions Setup**. The **ADDITIONAL PERMISSIONS SETUP** page is displayed.

| ADDITIONAL PERMISSIONS SETUP |                               |
|------------------------------|-------------------------------|
| 🗈 Save 🙋 Mail Merge 👻        |                               |
| PROJECT PERMISSIONS          |                               |
| Project Code *:              | Design Component Lead 🗙       |
| Project Name *:              | Design Component Lead 🗙       |
| Standard Items Table *:      | Design Component Lead 🗙       |
| Measurement Systems *:       | Design Component Lead X       |
| Business Unit *:             | Design Component Lead 🗙       |
|                              | Construction Component Lead × |
| ACQUISITIONS PERMISSION      |                               |
| View Private Bids *:         | Acquisitions ×                |
| CONTRACT PERMISSIONS         |                               |
| PE Work Done: Probables *:   | Administrator X               |
|                              | Construction Component Lead X |
|                              | LODEFULTION EARIN STATE #     |

Figure 78: Additional Permissions Setup Page

3. Provide the appropriate information in the fields, as described in the following table:

| Section             | Field Name               | Description                                  |
|---------------------|--------------------------|--|
| PROJECT PERMISSIONS | Project Code             | To provide permissions to edit project-      |
|                     | Project Name             | specific details, select the appropriate     |
|                     | Standard Items Table     | role.  |
|                     | Measurement Systems      | Available options are roles with <b>Edit</b> |
|                     | Business Unit            | permissions defined for the respective       |
|                     |                          | form in the <b>Permissions</b> matrix of the |
|                     |                          | Administration module.                       |
| ACQUISITIONS        | View Private Bids        | To provide permissions to view private       |
| PERMISSION          |                          | bids, select the appropriate role.           |
|                     |                          | Available options are roles with view        |
|                     |                          | permissions defined for the respective       |
|                     |                          | form in the Permissions matrix of the        |
|                     |                          | Administration module.                       |
| CONTRACT            | PE Work Done: Probables  | To provide permissions to view contract      |
| PERMISSIONS         | Pay Estimates            | specific details, select the appropriate     |
|                     | Adjustment: Probables    | role.  |
|                     | Contract Items: Is       | Available options are roles with view        |
|                     | Complete                 | permissions defined for the respective       |
|                     | Item Posting : Measured  | form in the <b>Permissions</b> matrix of the |
|                     | Ву                       | Administration module.                       |
|                     | Item Posting: Contractor |  |
|                     | Representative           |  |

| Section            | Field Name                | Description                                  |
|--------------------|---------------------------|--|
|                    | Item Posting : FHWA       |  |
|                    | Verified By               |  |
|                    | Pay Estimates: Funding    |  |
|                    | Summary                   |  |
|                    | Contract Items: Probables |  |
| REPORT PERMISSIONS | Pay Note Report:          | To provide permissions to view report        |
|                    | Probables                 | specific details, select the appropriate     |
|                    | Pay Note Summary          | role.  |
|                    | Report: Probables         | Available options are roles with view        |
|                    | Grand Pay Item Summary    | permissions defined for the respective       |
|                    | Dashboard: Probables      | form in the <b>Permissions</b> matrix of the |
|                    | Progress Payment Report:  | Administration module.                       |
|                    | Probables                 |  |
|                    | Pay Note Summary          |  |
|                    | Report: Probables         |  |

### 4. Click Save.

Permissions are successfully saved.

## 3.2.7.2. Calendar

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

The **Calendar** library catalog enables you to define the working days of the organization. You can also define non-working days and holidays for the organization in a calendar.

During project or contract creation when a calendar is selected, the number of working days of the project or contract is calculated based on the calendar selected.

## Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|           | LIBRARY              |     |                                     |
|-----------|----------------------|-----|-------------------------------------|
| ٩,        | Type to Search       | ~ ~ | Configure Standard Tables and Items |
|           | Bidding              |     | Create modify library data.         |
| 朣         | Contract Management  |     |                                     |
| :         | Contractors          |     |                                     |
| <b>\$</b> | Document Management  |     |                                     |
|           | 🛅 Estimate           |     |                                     |
|           | Fund Management      | - 1 |                                     |
|           | Notifications        |     |                                     |
|           | 🛅 Project Management |     |                                     |
|           | Resource Management  | <   |                                     |
|           | Time Zones           |     |                                     |
|           |                      |     |                                     |
|           |                      |     |                                     |

Figure 79: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Calendar**. The **CALENDAR** list page is displayed.

|     | LIBRARY                            | CALENDAR                                  |                   |
|-----|------------------------------------|---|-------------------|
| ٩,  | Type to Search 🗙 🗙 🔨               | 🞝 New 🖹 Reports 👻 🛱 Excel Import / Export | 🔹 💮 More 🗸        |
| Ô   | 🖿 Document Management 🔺            | Name Name                                 | Description       |
| 1   | Estimate                           | T   | T                 |
| 008 | 🖿 Fund Management                  | Standard Calendar                         | Standard Calendar |
|     | Notifications                      |   |                   |
| ж   | 🗂 Project Management               |   |                   |
|     | Additional Permissions             |   |                   |
|     | Calendar                           |   |                   |
|     | Density                            |   |                   |
|     | Measurement Systems                |   |                   |
|     | Measurement Unit Cros              |   |                   |
|     | <ul> <li>Partner Agency</li> </ul> |   |                   |
|     | <ul> <li>Pay Item Type</li> </ul>  |   |                   |
|     | Project Type                       |   |                   |

Figure 80: List Page of Calendar Form

3. Click New.

### The **CALENDAR** page is displayed.

| CALENDAR                          |                        |       |                    |   |
|-----------------------------------|------------------------|-------|--------------------|---|
| 🗟 Save & Exit 🛛 🚺 Save & Continue | 🛞 Cancel               |       |                    |   |
|                                   |                        |       |                    | 4 |
| Name *:                           | Standard Calendar      |       |                    |   |
| Description :                     | Standard Calendar      |       |                    |   |
|                                   | 7/                     |       |                    |   |
| Is Active :                       | <                      |       |                    |   |
| Non-Working Days :                | 🗌 Saturday 🔄 Sunday    |       |                    |   |
|                                   | 🗌 Monday 🛛 🗌 Tuesday   |       |                    |   |
|                                   | 🗌 Wednesday 📘 Thursday |       |                    |   |
|                                   | 🔲 Friday               |       |                    |   |
| EXCEPTIONS                        |                        |       |                    |   |
|                                   |                        |       | Ľ                  |   |
| Date                              | Туре                   | Notes | Recurring Annually |   |
| No records to display.            |                        |       |                    |   |
|                                   |                        |       |                    |   |
| •                                 |                        |       |                    | 4 |

Figure 81: Calendar Details Page

- 4. In the **Name** box, enter a name for the calendar.
- 5. In the **Description** box, enter a description for the calendar.
- 6. To make the calendar unavailable for selection in projects or contracts, clear the **Is Active** check box.
- 7. From the **Non-Working Days** check box options, select the non-working days in a week.
- 8. To define exceptions to the calendar, that is, to change a specific non-working day to a working day or contrariwise, in the **EXCEPTIONS** section, perform the following steps:
  - a. Click Add.

The New Exceptions dialog box is displayed.

| New Exceptions       |                     | × |
|----------------------|---------------------|---|
| Date *:              | 07/03/2024 🗸        |   |
| Туре :               | Non Working Day 🗸 🗸 |   |
| Notes :              |                     |   |
| Recurring Annually : |                     |   |
|                      | Save Cancel         |   |

Figure 82: New Exceptions Dialog Box

b. Provide the required information in the fields, as described in the following table.

| Field Name         | Description  |
|--------------------|--|
| Date               | Select the date to define an exception.                                  |
| Туре               | Select the required option.  |
|                    | • If the selected option is <b>Working Day</b> , the date is considered  |
|                    | when calculating the number of working days in projects.                 |
|                    | • If the selected option is <b>Non Working Day</b> , the date is not     |
|                    | considered when calculating the number of working days in                |
|                    | projects.  |
|                    | For example, in the <b>Non-Working Days</b> field, if <b>Saturday</b> is |
|                    | selected as a non-working day, and if a particular Saturday              |
|                    | needs to be a working day, the exception can be defined here,            |
|                    | and the Saturday is considered when calculating the number of            |
|                    | working days in the project.   |
| Notes              | Enter any appropriate notes for the exception.                           |
| Recurring Annually | Select the check box to consider the exception across years              |
|                    | when calculating the number of working days in a project.                |

## c. Click Save.

9. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

## 3.2.7.3. Measurement Systems

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Construction Component Lead
   For more information on role-specific permissions, refer to <u>Table 1 Library Catalog Permission Matrix</u>

### Overview

Every item in a project or in a contract is associated with a measurement unit to quantify the item. The **Measurement Systems** catalog enables you to define measurement systems and the related units of measure.

## Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|    | LIBRARY               | LIBRARY MANAGEMENT                  |
|----|-----------------------|-------------------------------------|
| 9  | Type to Search X X    | Configure Standard Tables and Items |
|    | Bidding               | Create modify library data.         |
| 朣  | Contract Management   |                                     |
|    | Contractors           |                                     |
| ش  | 📄 Document Management |                                     |
| ~~ | Estimate              |                                     |
|    | 🖿 Fund Management     |                                     |
|    | Notifications         |                                     |
|    | Project Management    |                                     |
|    | Resource Management   | <                                   |
|    | Time Zones            |                                     |
|    |                       |                                     |
|    |                       |                                     |

Figure 83: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Measurement Systems**. The **MEASUREMENT SYSTEMS** list page is displayed.

|          | LIBRARY                      | MEASUREMENT SYSTEMS                                |              |
|----------|------------------------------|--|--------------|
| Q,       | Type to Search 🗙 🗙 🔨         | New 🗑 Reports 🔹 💱 Excel Import / Export 👻 💬 More 🔹 |              |
|          | 🖿 Contract Management 🔺      | System name  | Description  |
| <b>⊡</b> | Contractors                  |  |              |
| 008      | Document Management          | US Customary                                       | US Customary |
| <b>1</b> | Estimate                     | Metric   | Metric       |
| spr      | 🖿 Fund Management            |  |              |
|          | Notifications                |  |              |
|          | 🖿 Project Management         |  |              |
|          | Additional Permissions       |  |              |
|          | <ul> <li>Calendar</li> </ul> |  |              |
|          | Density                      |  |              |
|          | Measurement Systems          |  |              |
|          | Measurement Unit Cros        |  |              |
|          | Partner Agency               |  |              |
|          | Pay Item Type                |  |              |



3. Click New.

The **MEASUREMENT SYSTEMS** page is displayed.

| MEASUREMENT S | SYSTEMS                          |                              |             |            |
|---------------|----------------------------------|------------------------------|-------------|------------|
| Save & Exit   | Save & Continue                  | 🛞 Cancel                     |             | <b>+</b> 1 |
|               | System name *:<br>Description *: | US Customary<br>US Customary |             |            |
| MEASUREMENT   | UNITS                            |                              |             |            |
|               |                                  |                              |             | ď          |
| Unit          |                                  |                              | Description |            |
| ACRE          |                                  |                              | ACRE        |            |
| стѕм          |                                  |                              | CTSM        |            |
| CUFT          |                                  |                              | CUFT        |            |
| CUYD          |                                  |                              | CUYD        |            |
| DAY           |                                  |                              | DAY         |            |
| EACH          |                                  |                              | EACH        |            |
| FXHR          |                                  |                              | FXHR        |            |
| GAL           |                                  |                              | GAL         | •          |
| Add Edit      | Delete                           |                              |             |            |

Figure 85: Measurement Systems Details Page

- 4. In the **System Name** box, enter the name for the measurement system.
- 5. In the **Description** box, enter the description for the measurement system.
- 6. To associate a unit with the measurement system, in the **MEASUREMENT UNITS** section, perform the following steps:
  - a. Click Add.

The New Measurement Units dialog box is displayed.

| New Measurement Units |             | × |
|-----------------------|-------------|---|
| Unit *:               | ACRE        |   |
| Description :         | ACRE        |   |
|                       | Save Cancel |   |

Figure 86: New Measurement Units Dialog Box

- b. In the **Unit** box, enter the name of the unit.
- c. In the **Description** box, enter a description for the measurement unit.
- d. Click Save.

The unit is added to the **MEASUREMENT UNITS** section.

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7. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

## 3.2.7.4. Measurement Unit Crosswalk

## Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team

For more information on role-specific permissions, refer to <u>Table 2 – Library Catalog Permission</u> <u>Matrix</u>

### Overview

The **Measurement Unit Crosswalk** catalog enables you to provide the conversion factor to convert the historic unit prices to the currently used unit based on the selected measurement system. This aids in using the **Unit Price Search** utility.

## Steps

1. In the module menu, click **Library**.



Figure 89: Library Management

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2. In the navigation pane, expand **Project Management**, and then click **Measurement Unit Crosswalk**. The **MEASUREMENT UNIT CROSSWALK** list page is displayed.

|    | LIBRARY  | MEA | ASUREMENT UNIT CROSSWALK |                              |                       |         |
|----|--|-----|--------------------------|------------------------------|-----------------------|---------|
| ٩, | Type to Search 🗙 🗙 🔨                             | Ð,  | New 🛃 Reports 👻 🖓 Exce   | I Import / Export 👻 💮 More 👻 |                       |         |
| 韵  | Contractors                                      |     | From Measurement System  | From Unit                    | To Measurement System | To Unit |
| 17 | Document Management                              |     | Ť                        | T                            |                       | T       |
|    | 🖿 Lstimate                                       |     | US Customary             | SQYD                         | US Customary          | SQFT    |
|    | Fund Management                                  |     | US Customary             | STA                          | US Customary          | MILE    |
| Q  | Notifications                                    |     | US Customary             | WEEK                         | Metric                | Week    |
|    | 🖿 Froject Management                             |     | US Customary             | TON                          | Metric                | t       |
|    | <ul> <li>Additional Permissions Setup</li> </ul> |     | US Customary             | STA                          | Metric                | km      |
|    | <ul> <li>Calendar</li> </ul>                     |     | US Customary             | SQYD                         | Metric                | m2      |
|    | Density  |     | US Customary             | SQFT                         | Metric                | m2      |
|    | Measurement Systems                              |     | US Customary             | SLRY                         | Metric                | siry    |
|    | Measurement Unit Crossw                          |     | US Customary             | Q TON                        | Metric                | Q t     |
|    | <ul> <li>Partner Agency</li> </ul>               |     | US Customary             | Q_STA                        | Metric                | Q_km    |
|    | <ul> <li>Pay Item Type</li> </ul>                |     | US Customary             | Q_SQYD                       | Metric                | Q_m2    |
|    | <ul> <li>Project Type</li> </ul>                 |     | US Customary             | Q_CUYD                       | Metric                | Q_m3    |
|    | Standard Items Conversion                        |     | US Customary             | мо                           | Metric                | mo      |

Figure 87: List Page of Measurement Unit Crosswalk Form

## 3. Click New.

## The **MEASUREMENT UNIT CROSSWALK** page is displayed.

| Save & Exit 🛛 🕞 Save & Continue | 🛞 Cancel       |
|---------------------------------|----------------|
| From Measurement System *:      | US Customary   |
| From Unit *:                    | SQYD ~         |
| To Measurement System *:        | US Customary 😽 |
| To Unit *:                      | SQFT ~         |
| Conversion Factor *:            | 0.1110         |

Figure 88: Measurement Unit Crosswalk Details Page

4. Provide the appropriate information in the fields, as described in the following table:

| Field Name              | Description   |
|-------------------------|---|
| From Measurement System | From the drop-down list, select the measurement system. |
|                         | Available options are Metric and US Customary.          |
|                         | The drop-down list displays measurement systems defined |
|                         | in the Measurement Systems catalog of the library. For  |
|                         | more information on measurement systems, refer to       |
|                         | Section 3.2.7.3 Measurement Systems.                    |
| From Unit               | From the drop-down list, select the measurement unit.   |
|                         | Available options are <b>Day, Each, Hour, Kg</b> , etc. |

| Field Name            | Description   |
|-----------------------|---|
|                       | The drop-down list displays measurement units defined for     |
|                       | the respective measurement system in the Measurement          |
|                       | Systems catalog of the library. For more information on       |
|                       | measurement systems, refer to <u>3.2.7.3. Measurement</u>     |
|                       | <u>Systems</u> .  |
| To Measurement System | From the drop-down list, select the measurement system.       |
|                       | Available options are Metric or US Customary.                 |
|                       | The measurement system selected in the From                   |
|                       | Measurement System field is not available for selection.      |
|                       | The drop-down list displays measurement systems defined       |
|                       | in the <b>Measurement Systems</b> catalog of the library. For |
|                       | more information on measurement systems, refer to             |
|                       | Section 3.2.7.3 Measurement Systems.                          |
| To Unit               | From the drop-down list, select the measurement unit.         |
|                       | Available options are ACRE, CTSM, CUFT, CUYD, etc.            |
|                       | The drop-down list displays measurement units defined for     |
|                       | the respective measurement system in the Measurement          |
|                       | Systems catalog of the library. For more information on       |
|                       | measurement systems, refer to <u>3.2.7.4. Measurement</u>     |
|                       | <u>Systems</u> .  |
| Conversion Factor     | Enter the appropriate conversion factor.                      |

5. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.2.7.5. Standard Items Tables

The **Standard Items Table** catalog is a collection of standard tables comprising commonly used items and their related information such as their units of measure, estimated cost, and so on. In the **Standard Items Table** catalog, you can group items into containers. This enables you to easily categorize items into specific containers for easy access and classification of work. You can create multiple such standard items tables and store them in the library for use in multiple projects across the application.

You can perform the following standard items table related activities:

- <u>3.2.7.5.1. Create a Standard Items Table</u>
- <u>3.2.7.5.2. Access items of a Standard Items Table</u>
- <u>3.2.7.5.3. Add Item to a Standard Items Table</u>
- <u>3.2.7.5.4. Copy items from Standard Items Table</u>
- <u>3.2.7.5.5. Import item details in bulk</u>

## 3.2.7.5.1. Creating a Standard Items Table

### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team

For more information on role-specific permissions, refer to Table 2 – Library Catalog Permission Matrix

### Overview

A standard table is a collection of items and containers. For categorization of items, items can be saved into containers.

### Steps

1. In the module menu, click Library.

|    | LIBRARY               | LIBRARY MANAGEMENT                  |
|----|-----------------------|-------------------------------------|
| Q, | Type to Search 🗙 🗙 🔨  | Configure Standard Tables and Items |
|    | Bidding               | Create modify library data.         |
| 朣  | Contract Management   |                                     |
| :  | Contractors           |                                     |
| ۵  | 📄 Document Management |                                     |
|    | Estimate              |                                     |
|    | 🖿 Fund Management     |                                     |
|    | Notifications         |                                     |
|    | Project Management    |                                     |
|    | 🖿 Resource Management |                                     |
|    | Time Zones            |                                     |
|    |                       |                                     |
|    |                       |                                     |

Figure 89: Library Management
2. In the navigation pane, expand **Project Management**, and then click **Standard Items Table**.



Figure 90: List Page of Standard Items Table Form

#### 3. Click New.

#### The **NEW STANDARD TABLE** page is displayed.



Figure 91: New Standard Table Page

- 4. In the **Table Name** box, type a name for the table.
- 5. From the **Measurement System** drop-down list, select a measurement system. Available options are **Metric** and **US Customary**.

The drop-down list displays measurement systems defined in the **Measurement Systems** catalog of the library. For information on measurement systems, refer to <u>Section 3.2.7.3. Measurement</u> <u>Systems</u>.

6. Click Save.

You can now add items to the table. For information on adding standard items, refer to <u>Section</u> 3.2.7.5.3. Adding Items to a Standard Items Table.

## 3.2.7.5.2. Accessing Items of a Standard Items Table

#### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team
- A/E Support Tools
- Project Viewer
- Design Component Lead
- Designer
- Lead Designer
- Design QA/QC
- Highway Design Manager
- Project Manager
- A/E Designer
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QA QC
- Construction Operations Engineer
- Inspector
- Assistant Project Engineer
- Project Engineer
- Regional Engineer
- Construction Inspection A&E Manager
- Inspector A&E
- Assistant Project Engineer A&E
- Project Engineer A&E
   For more information on role-specific permissions, refer to <u>Table 2 Library Catalog Permission Matrix</u>

#### Overview

You can access items and containers of a standard table to edit, view, or delete containers and items.

#### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|   | LIBRARY               |                                     |
|---|-----------------------|-------------------------------------|
| 9 | Type to Search X X    | Configure Standard Tables and Items |
|   | Bidding               | Create modify library data.         |
| 朣 | Contract Management   |                                     |
|   | Contractors           |                                     |
| ش | 🛅 Document Management |                                     |
| ~ | Estimate              |                                     |
|   | 🖿 Fund Management     |                                     |
|   | Notifications         |                                     |
|   | 🏲 Project Management  |                                     |
|   | Resource Management   |                                     |
|   | Time Zones            |                                     |
|   |                       |                                     |
|   |                       |                                     |

Figure 92: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Standard Items Table**.



Figure 93: List Page of Standard Items Table Form

3. Select the appropriate standard items table, click **Standard Items**.

| STANDARD TABLES LIST |                     |        |                  |          |  |  |
|----------------------|---------------------|--------|------------------|----------|--|--|
| _0                   | Edit 🐵 View 🔟       | Delete | 📑 Standard Items | 💮 More 🗸 |  |  |
|                      | Standard Table Name |        |                  |          |  |  |
|                      |                     |        |                  |          |  |  |
|                      | FP 14               |        |                  |          |  |  |
|                      | FP 03               |        |                  |          |  |  |
|                      |                     |        |                  |          |  |  |

Figure 94: Selecting Standard Items

### The **STANDARD ITEM LIST** page is displayed.

| STANDARD ITEM LIST   |  |   |                     |               |  |  |  |  |
|--|--|---|---------------------|---------------|--|--|--|--|
| New - Save Bt Excel Import / Export -  More -  |  |   |                     |               |  |  |  |  |
| Name   | Pay Item Description (US Customary)                  | ) Pay Item Description (Metric)                   | Unit (US Customary) | Unit (Metric) |  |  |  |  |
| T  | T  | T   | T                   | T             |  |  |  |  |
| □<br>  | MOBILIZATION   | Mobilization                                      | LPSM                | LPSM          |  |  |  |  |
| Image: 15201-0000  | CONSTRUCTION SURVEY AND STAKING                      | Construction survey and staking                   | LPSM                | LPSM          |  |  |  |  |
| ⊡      □ | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | LPSM                | LPSM          |  |  |  |  |
| Is206-0000   | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | MILE                | km            |  |  |  |  |
| □<br>  | CENTERLINE, STAKING                                  | Centerline, staking                               | MILE                | km            |  |  |  |  |
| □ 💮 🌉 15210-3000   | CENTERLINE, VERIFICATION AND<br>STAKING              | Centerline, verification and staking              | MILE                | km            |  |  |  |  |

Figure 95: Standard Item List

#### 3.2.7.5.3. Adding Items to a Standard Items Table

#### **Prerequisites**

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team

For more information on role-specific permissions, refer to Table 2 – Library Catalog Permission Matrix

#### **Overview**

Items must be added to the standard table to complete the process of creating standard tables so that they can be used across the application.

#### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.



Figure 96: Library Management

2. In the navigation pane, expand Project Management, and then click Standard Items Table.



Figure 97: List Page of Standard Items Table Form

3. Select the appropriate standard items table, and then click **Standard Items**.

| ST/ | STANDARD TABLES LIST |                  |          |  |  |  |  |  |
|-----|----------------------|------------------|----------|--|--|--|--|--|
| _0  | Edit 💿 View 🔟 Delete | 📑 Standard Items | 💮 More 🗸 |  |  |  |  |  |
|     | Standard Table Name  |                  |          |  |  |  |  |  |
|     |                      |                  |          |  |  |  |  |  |
|     | FP 14                |                  |          |  |  |  |  |  |
|     | FP 03                |                  |          |  |  |  |  |  |
|     |                      |                  |          |  |  |  |  |  |

Figure 98: Selecting Standard Items

#### The **STANDARD ITEM LIST** page is displayed.

| ST | STANDARD ITEM LIST                   |  |   |                     |               |  |  |  |
|----|--------------------------------------|--|---|---------------------|---------------|--|--|--|
| Ð  | New - 📄 Save 👫 Excel Import / Export | - 💮 More -   |   |                     |               |  |  |  |
|    | Name                                 | Pay Item Description (US Customary)                  | Pay Item Description (Metric)                     | Unit (US Customary) | Unit (Metric) |  |  |  |
|    | T                                    | T  | T   | T                   | T             |  |  |  |
|    | IS101-0000                           | MOBILIZATION   | Mobilization                                      | LPSM                | LPSM          |  |  |  |
|    | ± 🕞 15201-0000                       | CONSTRUCTION SURVEY AND STAKING                      | Construction survey and staking                   | LPSM                | LPSM          |  |  |  |
|    |                                      | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | LPSM                | LPSM          |  |  |  |
|    |                                      | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | MILE                | km            |  |  |  |
|    | I5210-1000                           | CENTERLINE, STAKING                                  | Centerline, staking                               | MILE                | km            |  |  |  |
|    | I5210-3000                           | CENTERLINE, VERIFICATION AND<br>STAKING              | Centerline, verification and staking              | MILE                | km            |  |  |  |

Figure 99: Standard Item List

- 4. To add an item, perform the following steps:
  - a. Click **New**, and then click **New**.



Figure 100: Add New Item

#### The **NEW STANDARD ITEM** page is displayed.

| NEW STANDARD ITEM                      |                                    |
|--|------------------------------------|
| Save & Exit Save & Continue            | 🕞 Save & Create New 🛞 Cancel 🔶 🕈 🕈 |
| Container                              | Root                               |
| Pay Item Number                        | : 15201-0000 <u>Clear</u>          |
| Pay Item Description (US<br>Customary) | CONSTRUCTION SURVEY AND<br>STAKING |
| Unit (US Customary)                    | LPSM V                             |
| Pay Item Description (Metric) *        | Construction survey and staking    |
| Unit (Metric) *                        | : LPSM 🗸                           |
| Bid Decimal *                          | : 0 ~                              |
| Pay Item Type *                        | • N ~                              |
| Material Incentive                     | : 🔵 Yes 💿 No                       |
| Standard Item Table Name               | : FP 14                            |
| Pay Item Created Date                  | : 06/2C/2023                       |
| Pay Item Modified Date                 | : 06/20/2023                       |
| <b>Division Requested</b>              | : Select One                       |
| Unit Price in \$                       | : C.OC                             |
| Force Unit Prices                      | :                                  |
| Force Quantity                         | : 🔽                                |
| Pid Type *                             |                                    |

Figure 101: New Standard Item Page

The following information is displayed:

| Field Name               | Description  |
|--------------------------|--|
| Container                | The name of the container, if any.                     |
| Standard Item Table Name | The name as defined while creating the standard table. |
| Pay Item Created Date    | The date on which the pay item is created.             |
| Pay Item Modified Date   | The date on which the pay item is modified.            |

b. Provide the appropriate information in the fields, as described in the following table:

| Field Name               | Description   |
|--------------------------|---|
| Pay Item Number          | Enter the item number.                                  |
| Pay Item Description (US | Enter the description of the item for the measurement   |
| Customary)               | system – US Customary.                                  |
| Unit (US Customary)      | From the drop-down list, select the unit of measure for |
|                          | the item.   |
|                          | Available options are ACRE, CTSM, CUFT, CUYD,           |
|                          | MILE, etc. The drop-down list displays the              |
|                          | measurement units defined for the US Customary          |
|                          | record in the Measurement System catalog of the         |

| Field Name                    | Description   |
|-------------------------------|---|
|                               | Library. For more information on measurement              |
|                               | systems, refer to <u>3.2.7.3. Measurement Systems.</u>    |
| Pay Item Description (Metric) | Enter the description of the item for the measurement     |
|                               | system – Metric.  |
| Unit (Metric)                 | From the drop-down list, select the unit of measure for   |
|                               | the item.   |
|                               | Available options are CTSM, Day, Each, Hour, KG, etc.     |
|                               | The drop-down list displays the measurement units         |
|                               | defined for the Metric record in the Measurement          |
|                               | System catalog of the Library. For more information on    |
|                               | measurement systems, refer to <u>3.2.7.3. Measurement</u> |
|                               | <u>Systems</u> .  |
| Bid Decimal                   | From the drop-down list, select the appropriate bid       |
|                               | decimal value for the item.                               |
|                               | Available options are 0, 1, 2, 3.                         |
| Pay Item Type                 | From the drop-down list, select the type of pay item.     |
|                               | Available options are <b>N, NM, NR, NS, QM</b> , etc.     |
|                               | The drop-down list displays the active pay item types     |
|                               | defined in the Pay Item Type catalog of the library.      |
| Material Incentive            | Click the appropriate option.                             |
| Division Requested            | From the drop-down list, select the appropriate division  |
|                               | requested.  |
|                               | Available options are Federal Land Highways, Eastern      |
|                               | Federal Lands, Central Federal Lands, and Western         |
|                               | Federal Lands.  |
|                               | The drop-down list displays the active business units     |
|                               | defined in the <b>Business Unit</b> form of the           |
|                               | Administration module.                                    |
| Unit Price in \$              | Enter the cost per unit.                                  |
| Force Unit Prices             | Select the check box to ensure the unit price for the     |
|                               | item is non-editable in the <b>e-Bidding</b> module.      |
| Force Quantity                | Select the check box to ensure the quantity for the item  |
|                               | is non-editable in the <b>e-Bidding</b> module.           |
| Bid Type                      | Click the appropriate option.                             |
| Mobilization                  | Select the check box to ensure the item is considered     |
|                               | as a mobilization item.                                   |
|                               | It enables the user to add the unit price as a percentage |
|                               | (%) of Schedule Amount in the engineer's estimate.        |
| Is Active                     | Ensure the check box is selected to make the standard     |
|                               | items table active.                                       |
| Notes/Remarks                 | Enter any notes for the item.                             |

5. Optionally, in the **ATTACHMENTS** section, upload or link related files.

For information on attachments, refer to <u>Section 4.1. Attachments</u>.

- 6. To save the item, perform any of the following steps, as applicable:
  - Click **Save & Exit** to return to the item list page.
  - Click **Save & Continue** to save the item and continue on the same page.
  - Click **Save & Create New** to save the current item and continue creating new items. Click **Cancel** to discard the added information and exit the page.

## 3.2.7.5.4. Copying Items from Standard Items Table

#### Prerequisites

- The role of the logged-in user must be one of the following:
  - Administrator
  - Pay Item Team
     For more information on role-specific permissions, refer to <u>Table 2 Library Catalog</u>
     <u>Permission Matrix</u>
- An item exists in the standard items table.

#### **Overview**

You can copy and paste items from a container to a different container.

#### Steps

1. In the module menu, click Library.

The **LIBRARY MANAGEMENT** page is displayed.



Figure 102: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Standard Items Table**.

| LIBRARY |  | ST         | NDARD TABLES LIST |                     |
|---------|--|------------|-------------------|---------------------|
| Q,      | Type to Search                             | <b>×</b> ∧ | Ð                 | New 💮 More 🗸        |
| 俞       | Document Management                        |            |                   | Standard Table Name |
| 14      | Estimate                                   |            |                   |                     |
| 708     | 🛅 Fund Management                          |            |                   | FP 14               |
|         | Notifications                              |            |                   | FP 03               |
| 3\$X    | 🛅 Project Management                       | - 1        |                   |                     |
|         | <ul> <li>Additional Permissions</li> </ul> | Setup      |                   |                     |
|         | Calendar                                   |            |                   |                     |
|         | <ul> <li>Density</li> </ul>                |            |                   |                     |
|         | <ul> <li>Measurement Systems</li> </ul>    | <          |                   |                     |
|         | Measurement Unit Cross                     | sswalk     |                   |                     |
|         | <ul> <li>Partner Agency</li> </ul>         |            |                   |                     |
|         | <ul> <li>Pay Item Type</li> </ul>          | - B        |                   |                     |
|         | <ul> <li>Project Type</li> </ul>           | - 1        |                   |                     |
|         | <ul> <li>Standard Items Conver</li> </ul>  | sion       |                   |                     |
|         | Standard Items Table                       |            |                   |                     |
|         | State/Territory                            |            |                   |                     |
|         | <ul> <li>Terrain</li> </ul>                |            |                   |                     |

Figure 103: List Page of Standard Items Table Form

3. Select the appropriate standard items table, click **Standard Items**.



Figure 104: Selecting Standard Items

#### The **STANDARD ITEM LIST** page is displayed.

| STANDARD ITEM LIST |   |  |   |                     |               |  |  |  |
|--------------------|---|--|---|---------------------|---------------|--|--|--|
| Ð                  | 🖓 New - 🔄 Save 📴 Excel Import / Export - 💬 More - |  |   |                     |               |  |  |  |
|                    | Name  | Pay Item Description (US Customary)                  | Pay Item Description (Metric)                     | Unit (US Customary) | Unit (Metric) |  |  |  |
|                    | T   | Ţ  | Ţ   | T                   | T             |  |  |  |
|                    | IS101-0000  | MOBILIZATION   | Mobilization                                      | LPSM                | LPSM          |  |  |  |
|                    | Ising 15201-0000                                  | CONSTRUCTION SURVEY AND STAKING                      | Construction survey and staking                   | LPSM                | LPSM          |  |  |  |
|                    |   | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | LPSM                | LPSM          |  |  |  |
|                    |   | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | MILE                | km            |  |  |  |
|                    |   | CENTERLINE, STAKING                                  | Centerline, staking                               | MILE                | km            |  |  |  |
|                    | I5210-3000  | CENTERLINE, VERIFICATION AND<br>STAKING              | Centerline, verification and staking              | MILE                | km            |  |  |  |

Figure 105: Standard Item List

4. Select the appropriate items, click **Actions**, and then click **Copy Items**.

| STANDARD ITEM LIST   |  |   |                     |  |  |  |  |  |
|--|--|---|---------------------|--|--|--|--|--|
| 🗘 New - 🗇 Save 🌶 Edit 💿 View 💼 Delete 😵 Actions - 💬 More - |  |   |                     |  |  |  |  |  |
| Name   | Pay Item   | Pay Item Description (Metric)                     | Unit (US Customary) |  |  |  |  |  |
|  | Ţ  | <b>T</b>  |                     |  |  |  |  |  |
| Ising 15101-0000   | MOBILIZATION   | Mobilization                                      | LPSM                |  |  |  |  |  |
| 🕑 💽 🎇 15201-0000   | CONSTRUCTION SURVEY AND STAKING                      | Construction survey and staking                   | LPSM                |  |  |  |  |  |
| ☐ ⊕ ₽ 15205-0000   | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | LPSM                |  |  |  |  |  |
| 15206-0000   | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | MILE                |  |  |  |  |  |

Figure 106: Copy Items

5. Select the appropriate container, click **Actions**, and then click **Paste Items**.

| ST | STANDARD ITEM LIST           |  |  |  |  |  |
|----|------------------------------|--|--|--|--|--|
| Ð  | New 👻 📄 Save 🍠 Edit 💿 View 👖 | Delete 🕄 Actions - 💬 More -  |  |  |  |  |
|    | Name                         | Pay Item Description (Metric)  |  |  |  |  |
|    |                              | T  |  |  |  |  |
|    | 15101-0000                   | MOBILIZATION Mobilization  |  |  |  |  |
|    | 15201-0000                   | CONSTRUCTION SURVEY AND STAKING Construction survey and staking  |  |  |  |  |
|    |                              | SLOPE, REFERENCE, AND CLEARING Slope, reference, and clearing and<br>AND GRUBBING STAKE grubbing stake |  |  |  |  |

Figure 107: Paste Items

The item is added to the container.

## 3.2.7.5.5. Import Item Details to Standard Items Tables in Bulk

#### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- Pay Item Team

For more information on role-specific permissions, refer to Table 2 – Library Catalog Permission Matrix

#### Overview

The Excel Import / Export feature enables you to upload and update standard item details in bulk.

The high-level process of uploading or updating details of standard items in bulk is as follows:

- 1. Export the template workbook.
- 2. Add or update item information in the template workbook.
- 3. Import the updated workbook.

#### Note: You cannot delete records or upload attachments using an Excel workbook

#### Steps

1. In the module menu, click **Library**.

#### The LIBRARY MANAGEMENT page is displayed.



Figure 108: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Standard Items Table**.

|     | LIBRARY                                    |            | STA | NDARD TABLES LIST   |
|-----|--|------------|-----|---------------------|
| Q,  | Type to Search                             | <b>×</b> ∧ | Ð   | New 💮 More 🗸        |
|     | 🖿 Document Management                      |            |     | Standard Table Name |
| 1.  | Estimate                                   |            |     |                     |
| nnA | 🖿 Fund Management                          |            |     | FP 14               |
|     | Notifications                              |            |     | FP 03               |
| 102 | 📩 Project Management                       |            |     |                     |
|     | <ul> <li>Additional Permissions</li> </ul> | Setup      |     |                     |
|     | Calendar                                   |            |     |                     |
|     | Density                                    |            |     |                     |
|     | Measurement Systems                        |            |     |                     |
|     | Measurement Unit Cross                     | sswalk     |     |                     |
|     | <ul> <li>Partner Agency</li> </ul>         |            |     |                     |
|     | <ul> <li>Pay Item Type</li> </ul>          |            |     |                     |
|     | <ul> <li>Project Type</li> </ul>           |            |     |                     |
|     | Standard Items Conver                      | sion       |     |                     |
|     | Standard Items Table                       |            |     |                     |
|     | <ul> <li>State/Territory</li> </ul>        |            |     |                     |
|     | <ul> <li>Terrain</li> </ul>                |            |     |                     |

Figure 109: List Page of Standard Items Table Form

3. Select the appropriate standard items table, click **Standard Items**.



Figure 110: Selecting Standard Items

### The **STANDARD ITEM LIST** page is displayed.

| ST | ANDARD ITEM LIST                     |  |   |                     |               |
|----|--------------------------------------|--|---|---------------------|---------------|
| Ð  | New 👻 🔄 Save 🖓 Excel Import / Export | - 💮 More -   |   |                     |               |
|    | Name                                 | Pay Item Description (US Customary)                  | Pay Item Description (Metric)                     | Unit (US Customary) | Unit (Metric) |
|    | T                                    | <b>T</b>   | T   | T                   | <b>T</b>      |
|    | I5101-0000                           | MOBILIZATION   | Mobilization                                      | LPSM                | LPSM          |
|    |                                      | CONSTRUCTION SURVEY AND STAKING                      | Construction survey and staking                   | LPSM                | LPSM          |
|    |                                      | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | LPSM                | LPSM          |
|    | 15206-0000                           | SLOPE, REFERENCE, AND CLEARING<br>AND GRUBBING STAKE | Slope, reference, and clearing and grubbing stake | MILE                | km            |
|    |                                      | CENTERLINE, STAKING                                  | Centerline, staking                               | MILE                | km            |
|    | I5210-3000                           | CENTERLINE, VERIFICATION AND<br>STAKING              | Centerline, verification and staking              | MILE                | km            |

Figure 111: Standard Item List Page

4. To export details of new items, in the toolbar, click **Excel Import / Export**, and then click **Excel Template** or **Excel Template With Data**.

| STANDARD ITEM LIST |                            |                                     |   |  |  |
|--------------------|----------------------------|-------------------------------------|---|--|--|
| Save               | Et Excel Import / Export - | 💮 More 🔻                            |   |  |  |
| Name               | 🛐 Excel Import             | cription (US Customary              | ) Pay Item Description (Metric)                   |  |  |
|                    | 🔄 Excel Export (xls)       |                                     |   |  |  |
| 🔲 🔃 🎼 15101-0000   | 🖹 Excel Export (xlsx)      | I                                   | Mobilization                                      |  |  |
| ☐ + ■ 15201-0000   | Excel Template (xls)       | N SURVEY AND STAKING                | Construction survey and staking                   |  |  |
| 15205-0000         | Excel Template (xlsx)      | (xls) G STAKE                       | Slope, reference, and clearing and grubbing stake |  |  |
| 15206-0000         | 🚡 Excel Template With Data | (xlsx) NCE, AND CLEARING<br>G STAKE | Slope, reference, and clearing and grubbing stake |  |  |
| 15210-1000         | CENT                       | ERLINE, STAKING                     | Centerline, staking                               |  |  |

Figure 112: Excel Import / Export Option

The Excel workbook template is downloaded to the local hard drive.

**Note:** It is recommended to download the template with data. To download the template workbook with data, ensure a **Standard Items Table** record is created and the appropriate details are added.

5. Open the saved Excel workbook template.

| 🗴 AutoSave 🌒 Off) 📙 🏷 - 🖓 - 🗉 Libra  | ary Management Items Template - Compatibility Mode 🗔 -   | avad to this PC $\sim$  | Q                            | - o ×              |
|--|--|---|------------------------------|--------------------|
| File Home Insert Draw Page Layout  | Formulas Data Review View Automate Help  |   | (F                           | Comments 🗹 Share 👻 |
|  | A <sup>×</sup> = = = ⇒ ∞ ∞<br>= = = = ∞ ∞ ∞<br>\$ • % ?  | Conditional Formatting      Image: Insert     Format as Table      Delete | × Σןγ×<br>↓ ↓                | Add-ins Analyze    |
| Clipboard IS Font  | Image: Second | Cell Styles Y Errmat  | ➤<br>Editing Sensitivity a   | Add-ins            |
| A1 $\checkmark$ : $\times \checkmark f_x \checkmark$ Internal ID   |  |   |                              | ~                  |
| A B C D  |  |   | J K                          |                    |
| Internal ID         Type         Indent Level         Line No           2         0         0         0         0           3         0         0         0         0           26         27         28         0         0         0 | Name Pay nem Description (US Customary) Note   | S Pay item No Accounting Lode C   | sroupname Unit (US Customar) | 0.00               |

Figure 113: Excel Template

The template workbook contains the following sheets:

- **Instructions** sheet This sheet provides instructions to enter details of the standard items table.
- **Item** sheet This sheet enables you to provide accurate information about the items in respective columns of this sheet.
- 6. In the Excel workbook, perform either of the following steps as applicable:
  - To upload new items, refer to <u>Upload New Items</u>.
  - To update the existing **Standard Items Table** record, refer to <u>Update the existing items</u>.

Note: The following pointers enable you to upload or update item information correctly:

- For lists and selection options, ensure the correct spelling of the option is entered
- For updating item information, ensure the InternalID refers correctly to the intended item
- You cannot delete items using an Excel workbook
- For Yes/No options, enter Yes or No in the relevant columns
- For True/False options, enter True or False in the relevant columns
- Fields that provides the automatically calculated value are not available in the template
- 7. To import the template workbook with item details to the application, perform the following steps:
  - a. In the STANDARD ITEM LIST page, click Excel Import / Export, and then click Excel Import.

| STANDARD ITEM LIST   |                                  |                              |   |
|--|----------------------------------|------------------------------|---|
| 🞝 New 👻 🛅 Save   | Et Excel Import / Export 🔻 💮 Mor | re 🔻                         |   |
| Name   | Excel Import                     | cription (US Customary)      | Pay Item Description (Metric)                     |
|  | 🖹 Excel Export (xls)             | T                            | T   |
| 15101-0000   | 📲 Excel Export (xlsx)            | 1                            | Mobilization                                      |
| Image: A constraint of the second se | 🖹 Excel Template (xls)           | N SURVEY AND STAKING         | Construction survey and staking                   |
| 15205-0000   | Excel Template (xlsx)            | NCE, AND CLEARING<br>G STAKE | Slope, reference, and clearing and grubbing stake |
| 15206-0000   | Excel Template With Data (xlsx)  | NCE, AND CLEARING<br>G STAKE | Slope, reference, and clearing and grubbing stake |
| 15210-1000   | CENTERLINE,                      | , STAKING                    | Centerline, staking                               |

Figure 114: Excel Import Option

The **IMPORT DETAILS FROM EXCEL FILE** page is displayed.

| IMPORT DETAILS FROM | EXCEL FILE  |                            |
|---------------------|-------------|----------------------------|
| 🕞 Back              |             |                            |
|                     | Select File | Choose File No file chosen |
|                     |             | Upload Save                |

Figure 115: Import Details From Excel File

b. Click **Choose File** to select the workbook with updated details. The **Open** dialog box is displayed.

| C Open                              |  |                                 | ×        |
|-------------------------------------|--|---------------------------------|----------|
| $\leftarrow \rightarrow \checkmark$ | $\uparrow$ $\checkmark$ > Downloads > $\lor$ ( | C Search Downloads              | م        |
| Organize 🔹                          | New folder                                     | ≣                               | • 🔳 😮    |
| > 🚞 R(                              | Name   | Date modified                   | Туре     |
| > 🚞 Si                              | ∨ Today  |                                 |          |
| > 🚞 W                               | 🗃 Library Management Items_Template            | 7/2/2024 10:27 PM               | Microso  |
| > 🗖 W                               | 👼 M01_Introduction_to_Masterworks_ditamap-10   | 7/2/2024 4:54 PM                | Microso  |
|                                     | ✓ Yesterday                                    |                                 |          |
|                                     | Labor_Equipment_Template                       | 7/1/2024 7:57 PM                | Microso  |
|                                     | $\checkmark$ Last week                         |                                 |          |
| ⊻ ≉                                 | Support-LogMeInRescue (1)                      | 6/25/2024 3:16 PM               | Applicat |
| <b></b>                             | 💳 OneDrive_1_6-24-2024                         | 6/24/2024 7:08 PM               | Compre   |
| *                                   |  |                                 |          |
|                                     | File name: Library Management Items_Template   | <ul> <li>✓ All files</li> </ul> | ~        |
|                                     | Upload from mo                                 | bile Open                       | Cancel   |

Figure 116: Open Dialog Box

- c. Select the appropriate workbook, and then click **Open**.
- d. Click **Upload** to import form information from the Excel workbook to the form.

| IMPORT DETAILS FROM EXCEL FILE |   |
|--------------------------------|---|
| 😔 Back                         |   |
| Select File                    | Choose File Librarymplate.xls Upload Save |

Figure 117: Upload Items from Excel

On successful import, the success message is displayed.

- e. On encountering errors while importing an Excel workbook, perform the following steps:
  - i. In the toolbar, click **Error Log**.



Figure 118: Error Log Option

The error log workbook is downloaded to your local storage.

- Open the workbook to view the errors in the various columns.
   Error messages in the cells are highlighted in red. Tabs in the workbook are also highlighted to indicate the presence of errors.
- iii. Open the Excel workbook with form information and modify form details. Optionally, you can make relevant corrections in the error log workbook and upload it.
- iv. Save and upload the Excel workbook to import the updated information.
- f. Click Save.
- g. Click Back.

The item details in the Excel workbook are uploaded to the **STANDARD ITEM LIST** page.

## 3.2.7.5.5.1. Upload Item Information

#### Steps

1. Enter the appropriate details in the worksheet, as described in the following table:

| Column       | Description   |
|--------------|---|
| Internal ID  | To upload details of new items, do not enter any details in       |
|              | the Internal ID column.   |
| Туре         | Select the type of item being defined.                            |
|              | <ul> <li>To create a container, select Container.</li> </ul>      |
|              | <ul> <li>To create an item, select Item.</li> </ul>               |
| Indent Level | Defines the line number of the parent container to group the      |
|              | current container or item into the parent container.              |
|              | Mandatory field; information must be provided.                    |
|              | Specify 0 for first level containers or items, 1 for second level |
|              | containers or items, and so on.                                   |
|              | For example, consider two containers, CONT1 and CONT2.            |
|              | To define CONT2 under CONT1, if Indent Level for CONT1 is         |
|              | set to n then Indent Level of CONT2 must be set to n+1.           |
|              | Similarly for items, to define an item in CONT2, Indent Level     |
|              | of the item must be set to n+2.                                   |
|              | The hierarchy of containers and items in containers must be       |
|              | defined sequentially in the Excel worksheet. For example, to      |
|              | define an item Item3 in a container C3 that is at indent level    |
|              | 0, the item must be defined with indent level 1 after the row     |
|              | with details of container C3.                                     |
|              | The following image illustrates three containers C1, C2, and      |
|              | C3. Container C3 is within C2. Items Item1 is in C1, Item2 is     |
|              | in C2, and Item3 is in C3. Note the indent levels defined in      |
|              | the Microsoft Excel template.                                     |

| Column                        | Description  |
|-------------------------------|--|
|                               | Constant (m) [] [] [] (] (] (] (] (] (] (] (] (] () () () () () () () () () () () () ()  |
|                               | $\begin{array}{c c c c c c c c c c c c c c c c c c c $   |
|                               | IDEA         V (I) Company         J         A         B         C         B         C         B         C         B         C         D         D <thd< th=""> <thd< th="">         D</thd<></thd<> |
|                               | 1         Hrm         1         D         Descention         PRU         0.00 Descention           5         Contaiver         1         20         Monthian         Monthian         000 Descention           6         Contaiver         1         20         Monthian         Monthian         000 Descention           7         Descention         2         20 Monthian         Merc2         LMAN         000 Descention  |
|                               | 3<br>3<br>< > restuctions Item → ± 4   |
|                               | Figure 122: Items and Containers Illustrated in Excel Workbook   |
|                               | The following image illustrates the items and containers   |
|                               | imported to Masterworks using the Excel workbook   |
|                               | containing information as illustrated in the previous image:   |
|                               |  |
|                               | Name     Pay Item Description (US Customary) Unit (US Customary) Pay Item Description (Metric) Unit (Me  |
|                               |  |
|                               | Default     Default     Default  |
|                               | G      G      Item1     Desc-Item1     L95M     Desc-Item1     L8  |
|                               |  |
|                               | □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □  |
|                               | Each Desc-Item3 kg   |
|                               | Figure 123: Items and Containers Import List   |
| Line No                       | Enter the appropriate line number of the item.   |
| Name                          | Enter the name of the container or item.   |
|                               | That is, if <b>Type</b> is selected as <b>Container</b> , then in the <b>Name</b>  |
|                               | column, enter the name of the container.   |
| Pay Item Description (US      | Enter the description of the item for the measurement  |
| Customary)                    | system – US Customary.   |
| Notes                         | Enter the notes for the container or item.   |
| Pay Item Number               | Enter the pay item number that uniquely identifies the item  |
|                               | Mandatory field: information must be provided.   |
| Unit (US Customary)           | Enter the acronym of the unit of measure for the item  |
| chir (co customary)           | The unit of measure entered here must match the unit of  |
|                               | measure defined in the US Customary record in the  |
|                               | Measurement Systems library catalog  |
|                               | For example ACBE CTSM CLIET CLIVD etc Mandatory  |
|                               | field: information must be provided002E  |
| Linit Price in \$             | Enter the cost of each of the item, as applicable  |
| Pay Item Description (Metric) | Enter the description of the item for the measurement  |
| Fay item Description (Methe)  | system Matric  |
|                               | Mandatory field: information must be provided  |
| Linit (Metric)                | Enter the acropym of the unit of measure for the item. The   |
|                               | unit of modeurs ontored here must match the unit of  |
|                               | unit of measure entered here must match the unit of  |
|                               |  |
|                               | Systems library catalog.   |
|                               | For example, UISM, Day, Each, Hour, Kg etc.  |
|                               | Mandatory field; information must be provided.   |

| Column             | Description  |
|--------------------|--|
| Bid Decimal        | Enter the appropriate bid decimal value for the item. You can            |
|                    | enter decimal value from 0 to 3.   |
|                    | Mandatory field; information must be provided.                           |
| Pay Item Type      | Enter the type of pay item.  |
|                    | The type of pay item must match the pay items defined in the             |
|                    | Pay Item Type library catalog.   |
|                    | For example, N, NM, NR, NS, QM, etc. Mandatory field;                    |
|                    | information must be provided.  |
| Material Incentive | Enter <b>Yes</b> if the item is a material incentive. Otherwise, enter   |
|                    | No.  |
| Division Requested | Enter the appropriate division requested.                                |
|                    | The division requested must match the active business units              |
|                    | defined in the <b>Business Unit</b> form of the <b>Administration</b>    |
|                    | module.  |
|                    | For example, Federal Land Highways, Eastern Federal Lands,               |
|                    | Central Federal Lands, or Western Federal Lands.                         |
| Force Unit Prices  | Enter <b>True</b> to ensure the unit price for the item is non-          |
|                    | editable in the <b>e-Bidding</b> module. Otherwise, enter <b>False</b> . |
| Force Quantity     | Enter <b>True</b> to ensure the quantity for the item is non-editable    |
|                    | in the <b>e-Bidding</b> module. Otherwise, enter <b>False</b> .          |
| Bid Type           | Enter either <b>Bid</b> or <b>Ancillary</b> .                            |
|                    | Mandatory field; information must be provided.                           |
| Mobilization       | Enter <b>True</b> to ensure mobilization is available for the item.      |
|                    | Otherwise, enter <b>False</b> .  |
| Is Active          | Enter <b>True</b> to ensure the standard items table is active in the    |
|                    | application. Otherwise, enter <b>False</b> .                             |

2. Save the workbook.

# 3.2.7.5.5.2. Updating Item Details in Bulk

#### Steps

1. Update the appropriate details in the worksheet, as described in the following table:

Note: Deleting an item from the Excel workbook does not delete the item in the standard items table.

| Column       | Description  |
|--------------|--|
| Internal ID  | Do not edit. Retain the value in this column.                |
| Туре         | Update the type of item being defined.                       |
|              | • To create a container, select <b>Container</b> .           |
|              | • To create an item, select <b>Item</b> .                    |
| Indent Level | Defines the line number of the parent container to group the |
|              | current container or item into the parent container.         |
|              | Mandatory field; information must be provided.               |

| Column                   | Description   |   |  |  |                             |  |  |
|--------------------------|---|---|--|--|-----------------------------|--|--|
|                          | Specify 0 for first le  | vel container   | s or ite                               | ems, 1 for s                                       | econd                       |  |  |
|                          | level containers or   | items, and so   | on.                                    | -,   |                             |  |  |
|                          | For example, consi  | der two conta   | ainers                                 | CONT1 ar   | d CONT2                     |  |  |
|                          | To dofino CONT2 u   | ndor CONT1  | if Indo                                | nt Lovel fo  |                             |  |  |
|                          |   | huer CONTI,   |  |  |                             |  |  |
|                          | set to n then inden   |   | N 1 2 mu                               | IST DE SET T                                       | o n+1.                      |  |  |
|                          | Similarly for items,  | to define an i  | tem in                                 | CON12, Ir  | ident Level                 |  |  |
|                          | of the item must be set to n+2.   |   |  |  |                             |  |  |
|                          | The hierarchy of co   | ntainers and  | items i                                | in containe  | ers must be                 |  |  |
|                          | defined sequential  | ly in the Excel   | works                                  | sheet. For e                                       | example, to                 |  |  |
|                          | define an item Item   | n3 in a contair   | ner C3                                 | that is at i                                       | ndent level                 |  |  |
|                          | 0, the item must be   | e defined with  | inden                                  | t level 1 af                                       | ter the row                 |  |  |
|                          | with details of cont  | ainer C3.   |  |  |                             |  |  |
|                          | The following image illustrates three containers C1 C2 and  |   |  |  |                             |  |  |
|                          | C3  |   |  |  | , o <u>2</u> , and          |  |  |
|                          | Co.   |   |  |  |                             |  |  |
|                          | Container C3 is within C2. Items item I is in C1, item2 is in   |   |  |  |                             |  |  |
|                          | $C_2$ , and items is in   | C3. Note the  | inden                                  | lievels dei  | ined in the                 |  |  |
|                          | Microsoft Excel ten   | nplate.   |  |  |                             |  |  |
|                          | <ul> <li>Accolance (a) (n) (a) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c</li></ul>   | no template (2) - Compatibulity, w 20 Sa<br>Review View Automate Help |  | avlest tatock 8 🔞                                  | a −                         |  |  |
|                          | $ \begin{array}{c} \sum_{i=1}^{n} \lambda \\ P_{i} \neq i \end{array} \begin{array}{c} A_{i} \\ A_{i} \neq i \end{array} $ | ) ⊕   | nal Formatting * 🛛 🔝<br>as table * 🛛 🛣 | newl · Σ· ΔΥ Ω                                     | Sentituty                   |  |  |
|                          |   | Inner: 15 Number 2  | es ~ 🔛                                 | Formativ 🕼 🤉 Filterin Selectin I<br>Colo Balang Au | lata<br>atysis Berstivity • |  |  |
|                          | R34C3 v i × √ Js<br>1 2 3 4 5<br>1 Infernal ID Type Indent Lovel Line No Name Pay   | 6 7<br>Item Description (US Customary) Notes                          | 8<br>Pay liem No Unit (US              | 0 10<br>Customary) Unit Price in S Pay I           | tom Description (Motrin)    |  |  |
|                          | 2 Container 0 1 C1<br>3 Hern 1 1 Des<br>4 Container 0 2 C2  | so llem1  | ller 1 LPSM                            | 0.00 Desc  | Lent                        |  |  |
|                          | 3 Ganather 1 3 03<br>3 Hem 2 2 Dec<br>7 Hem 2 3 Dec   | sc-i tem2<br>sc-i tem3  | item? I PGM<br>Item3 Fach              | 0.00 Desc<br>0.00 Desc                             | ltem2<br>ltem3              |  |  |
|                          | 23  |   | : •                                    |  |                             |  |  |
|                          | Figure 124: Items   | s and Containers I  | llustrate                              | d in Excel Woi                                     | rkbook                      |  |  |
|                          | The following image   | e illustrates th  | ne item                                | ns and con   | tainers                     |  |  |
|                          | imported to Master  | works using t   | he Exc                                 | el workbo  | ok                          |  |  |
|                          | containing informa  | tion as illustra  | ated in                                | the previo   | us image:                   |  |  |
|                          | STANDARD ITEM LIST  |   |  |  |                             |  |  |
|                          | New      The Save of Excellimport / Export  | →  → More →   |  |  |                             |  |  |
|                          | Name T  | Tay tern bescription tos costoniary                                   | ) dine (05 edision                     |  |                             |  |  |
|                          | Default   | Default   |  |  |                             |  |  |
|                          |   |   |  |  |                             |  |  |
|                          |   | Desc-Item1  | LPSM                                   | Desc-Item1   | LB                          |  |  |
|                          |   |   |  |  |                             |  |  |
|                          | 🗋 🕀 🖪 item2   | Desc-Item2  | LPSM                                   | Desc-Item2   | LB                          |  |  |
|                          | □ ⊕ 🕞 ltern3  | Desc-Item3  | Each                                   | Desc-Item3   | kg                          |  |  |
|                          | Figure 1  | 25: Items and Co  | ntainers                               | Import List  | •                           |  |  |
| Line No                  | Update the approp   | riate line num  | ber of                                 | the item.  |                             |  |  |
| Name                     | Update the name of  | f the contain   | er or it                               | em.  |                             |  |  |
|                          | That is if Type is se   | lected as Con   | nteine                                 | r then in th                                       | e Name                      |  |  |
|                          | adumn antar the   | colled as COI   | ontoin                                 | or   |                             |  |  |
| Development of the fille | column, enter the name of the container.  |   |  |  |                             |  |  |
| Pay item Description (US | Update the descrip  | otion of the ite  | m for t                                | ine measu  | rement                      |  |  |
| Customary)               | system – US Custo   | mary.   |  |  |                             |  |  |
| Notes                    | Update the notes for  | or the contain  | er or it                               | tem.   |                             |  |  |

| Column                        | Description  |
|-------------------------------|--|
| Pay Item Number               | Update the pay item number that uniquely identifies the                  |
|                               | item. Mandatory field; information must be provided.                     |
| Unit (US Customary)           | Update the acronym of the unit of measure for the item.                  |
|                               | The unit of measure entered here must match the unit of                  |
|                               | measure defined in the US Customary record in the                        |
|                               | Measurement Systems library catalog.                                     |
|                               | For example, ACRE, CTSM, CUFT, CUYD, etc. Mandatory                      |
|                               | field; information must be provided.                                     |
| Unit Price in \$              | Update the cost of each of the item. Mandatory field;                    |
|                               | information must be provided.  |
| Pay Item Description (Metric) | Update the description of the item for the measurement                   |
|                               | system – Metric.   |
|                               | Mandatory field; information must be provided.                           |
| Unit (Metric)                 | Update the acronym of the unit of measure for the item. The              |
|                               | unit of measure entered here must match the unit of                      |
|                               | measure defined in the Metric record in the Measurement                  |
|                               | Systems library catalog.   |
|                               | For example, CTSM, Day, Each, Hour, Kg etc. Mandatory                    |
|                               | field; information must be provided.                                     |
| Bid Decimal                   | Update the appropriate bid decimal value for the item. You               |
|                               | can enter decimal value from 0 to 3.                                     |
|                               | Mandatory field; information must be provided.                           |
| Pay Item Type                 | Update the type of pay item.   |
|                               | The type of pay item must match the pay items defined in                 |
|                               | the <b>Pay Item Type</b> library catalog.                                |
|                               | For example, N, NM, NR, NS, QM, etc. Mandatory field;                    |
|                               | information must be provided.  |
| Material Incentive            | Update Yes if the item is a material incentive. Otherwise,               |
|                               | enter <b>No</b> .  |
| Division Requested            | Update the appropriate division requested.                               |
|                               | The division requested must match the active business                    |
|                               | units defined in the <b>Business Unit</b> form of the                    |
|                               | Administration module.   |
|                               | For example, Federal Land Highways, Eastern Federal                      |
|                               | Lands, Central Federal Lands, or Western Federal Lands.                  |
| Force Unit Prices             | Update <b>True</b> to ensure the unit price for the item is non-         |
|                               | editable in the <b>e-Bidding</b> module. Otherwise, enter <b>False</b> . |
| Force Quantity                | Update <b>True</b> to ensure the quantity for the item is non-           |
|                               | editable in the <b>e-Bidding</b> module. Otherwise, enter <b>False</b> . |
| Bid Type                      | Update either <b>Bid</b> or <b>Ancillary</b> .                           |
|                               | Mandatory field; information must be provided.                           |
| Mobilization                  | Update <b>True</b> to ensure mobilization is available for the item.     |
|                               | Otherwise, enter <b>False</b> .  |

| Column    | Description  |
|-----------|--|
| Is Active | Update <b>True</b> to ensure the standard items table is active in |
|           | the application. Otherwise, enter <b>False</b> .                   |

#### 3.2.7.6. Standard Items Conversion Crosswalk

#### Prerequisites

The role of the logged-in user must be one of the following:

- Administrator
- o Pay Item Team

For more information on role-specific permissions, refer to <u>Table 2 – Library Catalog Permission</u> <u>Matrix</u>

#### Overview

The **Standard Items Conversion Crosswalk** catalog enables you to map the same items from different standard items tables to aid in the **Unit Price Search** utility.

#### Steps

1. In the module menu, click Library.

The LIBRARY MANAGEMENT page is displayed.

|      | LIBRARY               | LIBRARY MANAGEMENT                  |
|------|-----------------------|-------------------------------------|
| Q,   | Type to Search X 🗙    | Configure Standard Tables and Items |
|      | 🖿 Bidding             | Create modify library data.         |
| 朣    | Contract Management   |                                     |
|      | Contractors           |                                     |
| ش    | 🔲 Document Management |                                     |
| aque | Estimate              |                                     |
|      | 🖿 Fund Management     |                                     |
|      | Notifications         |                                     |
|      | 🖿 Project Management  |                                     |
|      | 🖿 Resource Management |                                     |
|      | Time Zones            |                                     |

Figure 119: Library Management

2. In the navigation pane, expand **Project Management**, and then click **Standard Items Conversion Crosswalk**.

### The **STANDARD ITEMS CONVERSION CROSSWALK** list page is displayed.

|      | LIBRARY  | STA | NDARD ITEMS CONVERSION CRO | SSWALK                      |                           |                             |                     |
|------|--|-----|----------------------------|-----------------------------|---------------------------|-----------------------------|---------------------|
| Q,   | Type to Search 🗙 🗙 🔨                             | ₽   | New 🖹 Reports 👻 🛐          | Excel Import / Export 👻 💮 I | More 🔻                    |                             |                     |
| 諭    | Document Management                              |     | To : Standard Items Table  | To : Pay Item No.           | To : Pay Item Description | From : Standard Items Table | From : Pay Item No. |
| 13   | Estimate   |     |                            |                             |                           |                             |                     |
| en B | 🕅 Fund Management                                |     | FP 14                      | 63314-1000                  | RUMBLE STRIP, SHOULDER    | FP 03                       | 63314-1000          |
|      | Notifications                                    |     | FP 14                      | 63314-0000                  | RUMBLE STRIP              | FP 03                       | 63314-0000          |
| \$   | Project Management                               |     | FP 14                      | 63302-1000                  | SIGN SYSTEM, GOVERNMEN    | FP 03                       | 63302-1000          |
|      | <ul> <li>Additional Permissions Setup</li> </ul> |     | FP 14                      | 55230-0000                  | CONCRETE COLOR FINISH     | FP 03                       | 55215-0000          |
|      | <ul> <li>Calendar</li> </ul>                     |     | FP 14                      | 55226-0000                  | CLEAN CONCRETE SURFACE    | FP 03                       | 55212-0000          |
|      | <ul> <li>Density</li> </ul>                      |     | FP 14                      | 50201-0000                  | CONCRETE PAVEMENT REST    | FP 03                       | 50201-0000          |
|      | <ul> <li>Measurement Systems</li> </ul>          |     | FP 14                      | 41302-0000                  | ASPHALT PAVEMENT MILLI    | FP 03                       | 41302-0000          |
|      | <ul> <li>Measurement Unit Crosswalk</li> </ul>   |     | FP 14                      | 31201-0000                  | DUST PALLIATIVE APPLICAT  | FP 03                       | 30601-0000          |
|      | <ul> <li>Partner Agency</li> </ul>               |     | FP 14                      | 31101-2000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30406-2000          |
|      | <ul> <li>Pay Item Type</li> </ul>                |     | FP 14                      | 31101-2000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30406-1000          |
|      | <ul> <li>Project Type</li> </ul>                 |     | FP 14                      | 31101-1000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30412-2000          |
|      | Standard Items Conversion                        |     | FP 14                      | 31101-1000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30412-1000          |
|      | Standard Items Table                             |     | FP 14                      | 31101-1000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30403-0800          |
|      | <ul> <li>State/Territory</li> </ul>              |     | FP 14                      | 31101-1000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30403-0700          |
|      | <ul> <li>Terrain</li> </ul>                      |     | FP 14                      | 31101-1000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30403-0600          |
|      | Resource Management                              |     | FP 14                      | 31101-1000                  | STABILIZED AGGREGATE SU   | FP 03                       | 30403-0500          |
| >    | Time Zones                                       | м   | < [1] 2 3 ► ►              |                             |                           |                             |                     |

Figure 120: List Page of Standard Items Conversion Crosswalk Form

#### 3. Click New.

#### The STANDARD ITEMS CONVERSION CROSSWALK page is displayed.

| 🗋 Save & Exit 🛛 🔂 S | ave & Continue  | ( Cancel               |     |
|---------------------|-----------------|------------------------|-----|
| PAY ITEM TO         |                 |                        |     |
| To: Standard        | ltems Table *:  | FP 14                  | ~   |
| ş                   | ay Item No. *:  | 63314-1000             |     |
| Pay Item            | Description :   | RUMBLE STRIP, SHOULDER |     |
|                     |                 |                        | ₩į. |
| PAY ITEM FROM       |                 |                        |     |
| From: Standard      | Items Table *:  | FP 03                  | ~   |
| From F              | Pay Item No. *: | 63314-1000             |     |
| From Pay Item       | Description :   | RUMBLE STRIP, SHOULDER | *   |
|                     |                 |                        | 7/1 |

Figure 121: Standard Items Conversion Crosswalk Details Page

4. In the **PAY ITEM TO** section, provide the appropriate information in the fields, as described in the following table:

Note: The standard items table selected in the To: Standard Items Table and From: Standard Items Table fields cannot be same.

| Field Name               | Description  |   |  |  |  |  |  |
|--------------------------|--|---|--|--|--|--|--|
| To: Standard Items Table | From the drop-down list, select the appropriate standard items table.  |   |  |  |  |  |  |
|                          | Available options are EP 03 and EP 14                                  |   |  |  |  |  |  |
|                          |  |   |  |  |  |  |  |
|                          | The drop-down list displays tables defined in the Standard Items Table |   |  |  |  |  |  |
|                          | catalog of the library. For more information on standard items table.  |   |  |  |  |  |  |
|                          | refer to Section 2.2.7.5. Standard Itama Tables                        |   |  |  |  |  |  |
|                          |  |   |  |  |  |  |  |
| Pay Item No.             | To select the pay item   | number, perform the following steps:              |  |  |  |  |  |
|                          | a. Click   |   |  |  |  |  |  |
|                          | The Doulton dieler here is dienlayed                                   |   |  |  |  |  |  |
|                          | The Pay Item u   |   |  |  |  |  |  |
|                          | Pay Item   | *   |  |  |  |  |  |
|                          | Pay Item   | T Description T                                   |  |  |  |  |  |
|                          | 15101-0000   | MORIIZATION                                       |  |  |  |  |  |
|                          | 15201.0000   | CONSTRUCTION SURVEY AND STARING                   |  |  |  |  |  |
|                          | 15205000   | SCOPE, RELEXENCE, AND CELERING AND COODING STAKE  |  |  |  |  |  |
|                          | 15215-1000   | SURVEY AND STAKING, APPROACH ROAD                 |  |  |  |  |  |
|                          | 15215-2000   | SURVEY AND STAKING, BRIDGE                        |  |  |  |  |  |
|                          | 15215-3000   | SURVEY AND STAKING, DRAINAGE STRUCTURE            |  |  |  |  |  |
|                          | 15215-1000   | SURVEY AND STAKING, PERMANENT MONUMENT AND MARKER |  |  |  |  |  |
|                          | 15215-1500   |   |  |  |  |  |  |
|                          |  |   |  |  |  |  |  |
|                          |  |   |  |  |  |  |  |
|                          | - Fi   | igure 122: Pay Item Dialog Box                    |  |  |  |  |  |
|                          |  |   |  |  |  |  |  |
|                          | Available optio  | ns are based on the standard items table          |  |  |  |  |  |
|                          | selected in the  | To: Standard Items Table field.                   |  |  |  |  |  |
|                          | h Click the enpre  | prints powitam, and than aliak <b>Salast</b>      |  |  |  |  |  |
|                          | D. Click the appro   | phate pay item, and then click <b>Select</b> .    |  |  |  |  |  |
|                          | Note: Based or   | n the Pay Item No. selected, the Pay Item         |  |  |  |  |  |
|                          | Description fiel   | d displays the description of the pay item as     |  |  |  |  |  |
|                          |  |   |  |  |  |  |  |
|                          | defined in the S   | bianuaru iterns Table catalog of the library. For |  |  |  |  |  |
|                          | more information   | on on standard items table, refer to 3.2.7.5.     |  |  |  |  |  |
|                          | Standard Items   | Tables on page 79.                                |  |  |  |  |  |

5. In the **PAY ITEM FROM** section, provide the appropriate information in the fields, as described in the following table:

| Field Name           | Description  |  |  |  |  |
|----------------------|--|--|--|--|--|
| From: Standard Items | From the drop-down list, select the appropriate standard items   |  |  |  |  |
| Table                | table.   |  |  |  |  |
|                      | Available options are FP 03 and FP 14.                           |  |  |  |  |
|                      | The drop-down list displays tables defined in the Standard Items |  |  |  |  |
|                      | Table catalog of the library. For more information on standard   |  |  |  |  |
|                      | items table, refer to Section 3.2.7.5. Standard Items Tables on  |  |  |  |  |
|                      | page 79  |  |  |  |  |
| From Pay Item No.    | To select the pay item number, perform the following steps:      |  |  |  |  |
|                      | a. Click .   |  |  |  |  |
|                      | The Pay Item dialog box is displayed.                            |  |  |  |  |



6. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 4. Appendix

# 4.1. Attachments

You can upload or link files in the **Documents** folders to every record. You can also upload any number of attachments, regardless of size, to a record or while performing workflow actions for a record.

The following sections explain how to upload or link, access, and download attachments in a form or workflow:

4.1.1. Attaching a File to a Form

4.1.2. Accessing and Downloading Attached Files

4.1.3. Deleting Attached Files

You can annotate and delete attachments.

# 4.1.1. Attaching a File to a Form

You can upload files to a form and link a file in the **Documents** folders of a form.

**Note**: The **Upload and Link New Document** option is the most preferred and used method to link files to a form by the FLH team.

The **Project Fund List** form is used for illustration purposes.

#### **Uploading Files to a Form**

To upload files, perform the following steps in the ATTACHMENTS section:

#### 1. Click **Upload Document**.

| PROJECT FUND L | IST                  |            |                    |        |               |              |           |   |
|----------------|----------------------|------------|--------------------|--------|---------------|--------------|-----------|---|
| Save & Exit    | Save & Continue      | Cancel     | Workflow           | - '2'  | Select Action | s 👻          |           | + |
|                | ALLOUIL NUMBER       | 1310043027 | 201.340.014.9700.0 | /++. 1 |               |              |           |   |
|                | Account Priority     | CON03-CON  | 04                 | ~      |               |              |           |   |
| Aut            | horized Amount (\$)  |            | 0                  | .00    |               |              |           |   |
| Ex             | pended Amount (\$)   |            | 0                  | .00    |               |              |           |   |
| Proba          | ble Expenditure (\$) | 6          | 0                  | .00    |               |              |           |   |
| Ren            | naining Amount (\$)  |            | 0                  | .00    |               |              |           |   |
|                | Notes                |            |                    |        |               |              |           |   |
| ATTACHMENTS    | 3                    |            |                    |        |               |              |           |   |
| 🖻 🗹 土          |                      |            |                    |        |               |              |           |   |
| File View      | Status Docum         | ent Na Url | //Link Title       | Uploa  | aded By U     | ploaded Date | File Size |   |
| No Attachment  | ts available         |            |                    |        |               |              |           |   |
| Link Docume    | nt Upload Docum      | ent        |                    |        |               |              |           |   |
| -              |                      |            |                    |        |               |              |           |   |

### The **Open** dialog box is displayed.

|                  |   | -                  |
|------------------|---|--------------------|
| rganize • New fo | der   | ≡ • □              |
| A Home           | Name  | Date modified      |
|                  | A01_Library_Management_PG_ditamap-10001     | 5/24/2023 3:08 PM  |
|                  | A01_Library_Management_PG_ditamap-10002     | 5/25/2023 5:23 PM  |
| 🗖 Desktop 🛛 🖈    | A01_Library_Management_PG_ditamap-10002     | 5/25/2023 5:23 PM  |
| Documents 🖈      | A01_Library_Management_PG_ditamap-10004     | 5/30/2023 11:04 AM |
| 🛓 Downloads 🔺    | A01_Library_Management_PG_Draft             | 5/29/2023 10:06 PM |
| 🔁 Pictures 🛛 🖈   | Adding_an_Engineers_Estimate_Item_dita-1000 | 6/21/2023 12:29 AM |
| 🚱 Music 🛛 🖈      | Adding_an_Engineers_Estimate_Item_ditaAddin | 6/15/2023 1:03 PM  |
| 🚺 Videos 🛛 🖈     | -   |                    |
| File             | ame: V All files                            |                    |

Figure 124: Open Dialog Box

To upload a single file, click the appropriate file.
 Optionally, to upload multiple files, press and hold CTRL, and then click the appropriate files.

3. Click Open.

| Open  |          |                      |                    |           |                 |        |
|---|----------|----------------------|--------------------|-----------|-----------------|--------|
| $\leftrightarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ |          | FHWA > Publishe      | ~ C                | Search F  | Published PDF   | ,<br>A |
| Organize 🔹 New  | folder   |                      |                    |           | ≣ •             |        |
| A Home  |          | Name                 | <u>^</u>           |           | Date modified   |        |
|   |          | A01_Library_Managem  | ent_PG_ditamap-1   | 0001      | 5/24/2023 3:08  | PM     |
|   |          | A01_Library_Managem  | ent_PG_ditamap-1   | 0002      | 5/25/2023 5:23  | PM     |
| 🔜 Desktop 🛛 🦸   |          | A01_Library_Managem  | ent_PG_ditamap-1   | 10002     | 5/25/2023 5:23  | PM     |
| Documents #   |          | A01_Library_Managem  | ent_PG_ditamap-1   | 10004     | 5/30/2023 11:04 | AM     |
| 🛓 Downloads  🖈  |          | A01_Library_Managem  | ent_PG_Draft       |           | 5/29/2023 10:06 | PM     |
| 🔀 Pictures 🛛 🖈  |          | Adding_an_Engineers_ | Estimate_Item_dita | -1000     | 6/21/2023 12:29 | MA (   |
| 🕑 Music 🛛 🖈   |          | Adding_an_Engineers_ | Estimate_Item_dita | Addin     | 6/15/2023 1:03  | PM     |
| 🚺 Videos 🛛 🖈  |          |                      |                    | _         |                 |        |
| Fil   | le name: |                      | ~                  | All files |                 |        |
|   |          |                      |                    | 0         | en Ca           | ncel   |

Figure 125: Open Option

The files are uploaded to the form and displayed in the ATTACHMENTS section.

4. The name of the file is updated in the **Title** column.

Optionally, in the **Title** column, enter the tiles for the files attached.

| ROJECT FUND L | IST                     |          |       |            |            |       |         |             |                    |           |
|---------------|-------------------------|----------|-------|------------|------------|-------|---------|-------------|--------------------|-----------|
| Save & Exit   | Save & Continue         | 🛞 Ca     | ncel  | 厨 Wo       | rkflow 👻   | Se Se | elect A | ctions 👻    |                    | 1         |
|               | ACCOUNT NUMBER          | 131004   | 30212 | .01.040.CN | N.V/UU.U4. |       |         |             |                    |           |
|               | Account Priority        | CON03    | COND  | 14         | ¥          |       |         |             |                    |           |
| Aut           | horized Amount (\$)     | :        |       |            | 0.00       |       |         |             |                    |           |
| Exj           | pended Amount (\$)      | :        |       |            | 0.00       |       |         |             |                    |           |
| Proba         | ble Expenditure (\$)    | :        |       |            | 0.00       |       |         |             |                    |           |
| Ren           | naining Amount (\$)     | :        |       |            | 0.00       |       |         |             |                    |           |
|               | Notes                   | :        |       |            | <b>A</b>   |       |         |             |                    |           |
| TACHMENTS     | :                       |          |       |            |            |       |         |             |                    |           |
| File View     | Status Document         | Name     | Uri/L | ink        | Title      |       |         | Uploaded By | Uploaded Date      | File Size |
| כ             | Fund Manag<br>FHWA.docx | ement in |       |            | Document   | - FM  | 1       | Mike Ross   | 07-27-2023 3:05 AM | 13 KB     |
| ink Docume    | nt Upload Docum         | ient     |       |            |            |       |         |             |                    |           |
|               |                         |          |       |            |            |       |         |             |                    |           |

#### Figure 126: Uploaded File

#### Linking a File to a Form

You can link a file to a form using any of the following options:

- Masterworks Document: This option enables you to link files available in the document folders of a project or contract. The document folders are available based on the selected document folder structure in the PROJECT DETAILS page.
   Note: This option helps users avoid uploading the same files multiple times in a project.
- **Upload and Link New Document:** This option enables you to upload new files to the document folders of a project or contract and link them to the respective form. The document folders are available based on the selected document folder structure in the PROJECT DETAILS page.

**Note:** This option helps users upload new files into the document folder structure from the respective form without navigating to the document folder.

**Note:** The **Upload and Link New Document** option is the most preferred and used method to link files to a form by the FLH team.

• **External Document:** This option enables you to link files from an external location.

### Linking a File to a Form – Masterworks Document Option

To link a file available in the Documents folders, perform the following steps:

#### 1. In the ATTACHMENTS section, click Link Document.

| PROJECT FUND LIS | T                     |             |                |          |           |               |           |   |   |
|------------------|-----------------------|-------------|----------------|----------|-----------|---------------|-----------|---|---|
| Save & Exit      | Save & Continue       | 🛞 Cancel    | 厨 Workfl       | ow 🔻     | Select Ac | tions 👻       |           | 4 | - |
|                  | ACCOUNT NUMBER .      | 13100430272 | 201.340.011.07 | 00.04.1  |           |               |           |   | 4 |
|                  | Account Priority :    | CON03-CON0  | )4             | ~        |           |               |           |   |   |
| Autho            | orized Amount (\$) :  |             |                | 0.00     |           |               |           |   |   |
| Expe             | ended Amount (\$) :   |             |                | 0.00     |           |               |           |   |   |
| Probabl          | le Expenditure (\$) : |             |                | 0.00     |           |               |           |   |   |
| Rema             | aining Amount (\$) :  |             |                | 0.00     |           |               |           |   |   |
|                  | Notes :               |             |                | <b>A</b> |           |               |           |   |   |
| ATTACHMENTS      |                       |             |                |          |           |               |           |   |   |
| Ū 🗹 🕹            |                       |             |                |          |           |               |           |   |   |
| File View S      | itatus Docume         | nt Na Url   | /Link Tit      | e Up     | loaded By | Uploaded Date | File Size |   |   |
| No Attachments   | available             |             |                |          |           |               |           |   |   |
| Link Document    | Upload Docume         | ent         |                |          |           |               |           |   |   |
| G                |                       |             |                |          |           |               |           |   | , |

Figure 127: Using Link Document Option

# The Link Document dialog box is displayed.

| Link Document        |                                 |                     | ×            |
|----------------------|---------------------------------|---------------------|--------------|
| MasterWorks Document | O Upload and Link New Document  | O External Document |              |
| Folder : Rn-FHV      | A-2607, RESTORATION OF NORTHERN | RAILS ~             |              |
|                      | 2                               | Gearch Clear Search |              |
| Document Name        | Title                           | Created By          | Created Date |
| No Link available    |                                 |                     |              |
|                      |                                 |                     |              |
|                      | ОК                              | Cancel              |              |
|                      |                                 |                     |              |

Figure 128: Link Document Dialog Box

#### 2. Click Masterworks Document.

| Link Document        |                                   |                     | × |
|----------------------|-----------------------------------|---------------------|---|
| MasterWorks Document | O Upload and Link New Document    | O External Document |   |
| Folder : Rn-Fl       | HWA-2607, RESTORATION OF NORTHERN | RAILS 🗸             |   |
|                      | OK Cancel                         |                     |   |

Figure 129: Using Masterworks Document Option

3. In the **Folder** drop-down list, select the appropriate document folder where the files exist. The list of files in that folder is displayed.

| Link Document          |                                   |                     | ×                  |
|------------------------|-----------------------------------|---------------------|--------------------|
| MasterWorks Document   | O Upload and Link New Document    | O External Document |                    |
| Folder : Rn-FHWA       | -2607, RESTORATION OF NORTHERN RA | ILS 🗸               |                    |
|                        | Sear                              | ch Clear Search     |                    |
| Document Name          | Title                             | Created By          | Created Date       |
| Fund Management in FHW | A.docx Document - FM              | Mike Ross           | 07-27-2023 3:17 AM |
|                        |                                   |                     |                    |
|                        | ОК                                | Cancel              |                    |
|                        |                                   |                     |                    |

Figure 130: List of Documents

- 4. Perform any of the following steps, as applicable:
  - From the list of files, select the appropriate files.
  - To search for a file, in the box, enter any search criteria for the file, click **Search**, and then select the appropriate files.

| Link Document        |                                       |                     | ×            |
|----------------------|---------------------------------------|---------------------|--------------|
| MasterWorks Document | O Upload and Link New Document        | O External Document |              |
| Folder : SIT - CA    | HBP CR104(1) ET AL, SIT - TRINITY COU | INTY HBP BRIDGES    |              |
| Document Name        | Title                                 | Created By          | Created Date |
|                      |                                       |                     |              |
|                      | OK                                    | Cancel              |              |

Figure 131: Using Search Option

You can specify search criteria such as the extension of the file type, the date or time the file was uploaded, the name or title of the file, or the username of the user who uploaded the file.

• Optionally, to view all the files in the selected folder, click **Clear Search**.

#### 5. Click **OK**.

The files are linked to the form and are displayed in the **ATTACHMENTS** section.

| Save & Exit Save & Continue   Account Priority   Authorized Amount (S)   Expended Amount (S)   Expended Amount (S)   Image: Same and the second and the |                      |                     |                 |                  |             |               |        |
|--|----------------------|---------------------|-----------------|------------------|-------------|---------------|--------|
| Account Priority:CON03-CON04Authorized Amount (S):0.00Expended Amount (S):0.00Probable Expenditure (S):0.00Remaining Amount (S):0.00Notes:0.00   | Save & Exit 🚺 Save & | Continue 🛞 Cano     | el 🛃 Workflow 👻 | Select Actions 👻 |             |               | +      |
| Authorized Amount (S):0.00Expended Amount (S):0.00Probable Expenditure (S):0.00Remaining Amount (S):0.00Notes:   | Account              | Priority : CON03-CO | ON04 🗸          |                  |             |               |        |
| Expended Amount (\$)       :       0.00         Probable Expenditure (\$)       :       0.00         Remaining Amount (\$)       :       0.00         Notes       :  | Authorized Amo       | unt (\$) :          | 0.00            |                  |             |               |        |
| Probable Expenditure (\$)       :       0.00         Remaining Amount (\$)       :       0.00         Notes       :       •  | Expended Amo         | ount (S) :          | 0.00            |                  |             |               |        |
| Remaining Amount (S) : 0.00 Notes :  | Probable Expendi     | ture (\$) :         | 0.00            |                  |             |               |        |
| Notes :  | Remaining Amo        | ount (\$) :         | 0.00            |                  |             |               |        |
|  |                      | Notes :             | <u>۸</u>        |                  |             |               |        |
| TTACHMENTS   | TTACHMENTS           |                     | 26              |                  |             |               |        |
|  |                      |                     |                 |                  |             |               |        |
|  |                      |                     |                 | TAL              | Uploaded By | Uploaded Date | Eila S |
| Image: Second status     Document Name     Url/Link     Title     Uploaded By     Uploaded Date     File   | File View Status     | Document Name       | Url/Link        | Inte             |             |               | File 3 |

Figure 132: Linked Document

**Note**: The **Url/Link** column displays the path to the folder where the document is available. You can click the folder path to open the folder.

6. In the **Title** column, enter the titles for the linked files.

#### Linking a File to a Form – Upload and Link New Document Option

To upload a file to a folder in the Documents folder structure and link the file to the respective form, perform the following steps:

**Note**: The **Upload and Link New Document** option is the most preferred and used method to link files to a form by the FLH team.

1. In the ATTACHMENTS section, click Link Document.

| PROJECT FUND LIST               |                          |                 |               |            |
|---------------------------------|--------------------------|-----------------|---------------|------------|
| Save & Exit Save & Continue     | 🛞 Cancel 🖟 Workflow      | w 👻 🤔 Select Ac | tions 🔻       | <b>+ +</b> |
| Account Number                  | 1310045027201.340.014.70 | 0.04.1          |               |            |
| Account Priority                | CON03-CON04              | ~               |               |            |
| Authorized Amount (\$)          |                          | 0.00            |               |            |
| Expended Amount (\$)            |                          | 0.00            |               |            |
| Probable Expenditure (\$)       |                          | 0.00            |               |            |
| Remaining Amount (\$)           |                          | 0.00            |               |            |
| Notes :                         |                          | ▲<br>₩          |               |            |
| ATTACHMENTS                     |                          |                 |               |            |
| <b>ē</b> ⊯ <b>±</b>             |                          |                 |               |            |
| File View Status         Docume | ent Na Url/Link Title    | Uploaded By     | Uploaded Date | File Size  |
| No Attachments available        |                          |                 |               |            |
| Link Document Upload Docum      | ent                      |                 |               |            |
| < ∈                             |                          |                 |               | •          |

#### Figure 133: Using Link Document Option

#### The Link Document dialog box is displayed.

| Link Document        |                              |                                 | ×                 |
|----------------------|------------------------------|---------------------------------|-------------------|
| MasterWorks Document | O Upload and Link New Docume | ent 🔵 External Docu             | iment             |
| Folder : Rn-FHW      | 4-2607, RESTORATION OF NORTH | ERN RAILS<br>Search Clear Searc | <b>∼</b>          |
| Document Name        | Title                        | Create                          | d By Created Date |
| No Link available    |                              |                                 |                   |
|                      | ОК                           | Cancel                          |                   |

Figure 134: Link Document Dialog Box

#### 2. Click Upload and Link New Document.

| Link Document          |  | × |
|------------------------|--|---|
| O MasterWorks Document | O External Document                    |   |
| Folder : Rn-FH         | WA-2607, RESTORATION OF NORTHERN RAILS |   |
|                        | OK Cancel                              |   |

Figure 135: Using Upload and Link New Document Option

- 3. In the **Folder** drop-down list, select the appropriate folder to upload files.
- 4. Click OK.

A confirmation dialog box is displayed.

5. Click **OK**.

The **NEW DOCUMENT** page is displayed.

| NEW DOCUMENT      | el .   |              |
|-------------------|--|--------------|
| Save a cane       |  |              |
| Title             | FHWA_Restoration of Northern Ra                |              |
| New Document      |  | Select files |
| Template Document | : 🔲 (Used as Template Document for Mail Merge) |              |
| Workflow          | None 🗸   |              |

Figure 136: New Document Page

- To upload files, in the New Document section, drag and drop the appropriate files.
   On uploading and saving the files, the files are uploaded to the selected folder in the Folder dropdown list and linked to the respective form.
- 7. In the **Title** column, enter the titles for the linked files.

#### Linking a File to a Form – External Document Option

To link a file to an external storage system, perform the following steps:

#### 1. In the ATTACHMENTS section, click Link Document.

| PROJECT FUND L | IST                    |            |            |              |             |               |           |
|----------------|------------------------|------------|------------|--------------|-------------|---------------|-----------|
| Save & Exit    | Save & Continue        | 🛞 Cancel   | 厨 Worl     | cflow 🝷      | 🐮 Select    | Actions 👻     | 1         |
|                | Account Number .       | 1310043027 | 201.340.CN | v / UU.U4. I |             |               |           |
|                | Account Priority :     | CON03-CON  | )4         | ~            | ·           |               |           |
| Aut            | horized Amount (\$) :  |            |            | 0.00         |             |               |           |
| Ex             | pended Amount (\$) :   |            |            | 0.00         |             |               |           |
| Proba          | ble Expenditure (\$) : |            |            | 0.00         |             |               |           |
| Ren            | naining Amount (\$) :  |            |            | 0.00         |             |               |           |
|                | Notes :                |            |            |              |             |               |           |
| TTACHMENTS     |                        |            |            |              |             |               |           |
| Ū 🗹 土          |                        |            |            |              |             |               |           |
| File View      | Status Docume          | nt Na Url  | /Link T    | itle L       | Iploaded By | Uploaded Date | File Size |
| No Attachment  | s available            |            |            |              |             |               |           |
| Link Docume    | nt Upload Docume       | ent        |            |              |             |               |           |
|                |                        |            |            |              |             |               |           |

Figure 137: Using Link Document Option

#### 2. Click External Document.

| Link Document        |                                   | ×                 |
|----------------------|-----------------------------------|-------------------|
| O MasterWorks Docume | ent OUpload and Link New Document | External Document |
| Url/Link :           | https://                          |                   |
| Title :              |                                   |                   |
|                      | OK Cancel                         |                   |

Figure 138: Using External Document Option

- 3. In the URL/Link box, enter the URL to the file in the external storage system.
- 4. In the **Title** box, enter the title for the linked file.
- 5. Click **OK**.

The file is linked to the form and is displayed in the **ATTACHMENTS** section.

# 4.1.2. Accessing and Downloading Attached Files

You can access files that are attached to forms and workflows. The **Project Fund List** form is used for illustration purposes.

- To access files attached to a form (from the list page):
- 1. In the navigation pane, click the required form.

The form list page is displayed.

| PROJECTS     |   |   | PROJECT FUND LIST |                 |                      |                  |                  |                      |  |  |
|--------------|---|---|-------------------|-----------------|----------------------|------------------|------------------|----------------------|--|--|
| Q, 1         | ype to Search 🗙 🗙 🔨   | Ð | New               | 🕅 Workflow 👻 📳  | Reports 👻 📴 Excel Ex | sport 🔹 💮 More 🔹 |                  |                      |  |  |
| 韵            | SIT - CA ERFO FS LSPDR 2023-1(1 💌                             |   | 0                 | Project Fund ID | Fund Source Name     | Fund Source Code | Fund Source Type | Fund Description     |  |  |
| 讘            | General Quick Access  |   |                   | <b></b> T       | T                    | <b>T</b>         | <b>T</b>         |                      |  |  |
| an B         |   |   |                   | PFL-4           | CON04                | CON04            | CON              | CLIN00101: ERFO      |  |  |
|              | STL- CA ERFO FS LSPDR 2023-1(1)                               |   |                   | PFL-3           | CON03                | CON03            | CON              | Option X             |  |  |
| <b>(</b> \$} | + Documents   |   |                   | PFL-2           | CON02                | CON02            | CON              | CLIN00101: ERFO      |  |  |
|              | Document Search   |   |                   | DEL 1           | CON01                | CON01            | CON              | CUN00101: Non EREO   |  |  |
|              | Project Report Gallery  | 0 |                   |                 | CONT                 | CONOT            | CON              | CENTRON NOTIFICATION |  |  |
|              | <ul> <li>Project Calendar</li> <li>Fund Management</li> </ul> |   |                   |                 |                      |                  |                  |                      |  |  |
|              |   |   |                   |                 |                      |                  |                  |                      |  |  |
|              | Project Fund List   |   |                   |                 |                      |                  |                  |                      |  |  |
|              | Project Fund Transaction                                      |   |                   |                 |                      |                  |                  |                      |  |  |
|              | Funding Rules   |   |                   |                 |                      |                  |                  |                      |  |  |



#### 2. Click **More**, and then click **Attachments**.

| PRC | PROJECT FUND LIST |                 |                  |         |             |  |  |  |  |  |  |  |
|-----|-------------------|-----------------|------------------|---------|-------------|--|--|--|--|--|--|--|
| Ð   | New               | 卧 Workflow - 📔  | 💮 More 👻         |         |             |  |  |  |  |  |  |  |
|     | 0                 | Project Fund ID | Fund Source Name | Fund So | urce Type   |  |  |  |  |  |  |  |
|     |                   | T               | T                |         | Attachments |  |  |  |  |  |  |  |
|     | 0                 | PFL-4           | CON04            | CON04   | R Audit Log |  |  |  |  |  |  |  |
|     |                   | PFL-3           | CON03            | CON03   | CON         |  |  |  |  |  |  |  |
|     |                   | PFL-2           | CON02            | CON02   | CON         |  |  |  |  |  |  |  |
|     |                   | PFL-1           | CON01            | CON01   | CON         |  |  |  |  |  |  |  |

Figure 140: Using Attachments Option

The attachments of all the records are listed.

| PR              | PROJECT FUND LIST DOCUMENTS |  |         |          |        |      |            |                    |  |  |  |  |
|-----------------|-----------------------------|--|---------|----------|--------|------|------------|--------------------|--|--|--|--|
| 🕞 Back 💮 More 🕶 |                             |  |         |          |        |      |            |                    |  |  |  |  |
|                 | Record Identifier           | Document Name                          | Version | Url/Link | Title  | Туре | Size       | Created On         |  |  |  |  |
|                 | Ţ                           |  |         |          | T      |      |            | MM/dd/ 📅 🗿 🔽       |  |  |  |  |
|                 | <u>PFL-2 / CON02</u>        | Project_Fund_List_Att<br>achments_FHWA | 1       |          | Angela | PDF  | 7574.29 KB | 12/14/2023 6:32 AM |  |  |  |  |

Figure 141: List of Attachments

Optionally, to view files attached to a record, select the appropriate record and then click **Attachments**.

| PR | ојест і | FUND LIST       |      |                  |                    |         |          |             |
|----|---------|-----------------|------|------------------|--------------------|---------|----------|-------------|
| _0 | Edit    | 💿 View 🔟 Del    | lete | 🕼 Workflow 👻 🗐   | Reports 👻 🙋 Mail M | erge 💌  | ⊖ More ▼ |             |
|    | 0       | Project Fund ID | T    | Fund Source Name | Fund Source Code   | Fund So | Attachme | Description |
|    |         | PFL-2           | :    | CON02            | CON02              | CON     |          |             |
|    |         | PFL-1           |      | CON01            | CON01              | CON     |          | TS90        |

Figure 142: Viewing Files Attached to a Record

- To access and download files attached to a record (from the details page):
- 1. In the navigation pane, click the appropriate form.

The form list page is displayed.

|                        | PROJECTS                            | PROJ | PROJECT FUND LIST  |                 |                  |                  |                  |                     |  |  |  |
|------------------------|-------------------------------------|------|--|-----------------|------------------|------------------|------------------|---------------------|--|--|--|
| 🤇 Type to Search 🗙 🗙 🔨 |                                     |      | 🞝 New 🕅 Workflow - 🖹 Reports - 🕃 Excel Export - 😁 More - |                 |                  |                  |                  |                     |  |  |  |
|                        | SIT - CA ERFO FS LSPDR 2023-1(1 💌   |      | 0  | Project Fund ID | Fund Source Name | Fund Source Code | Fund Source Type | Fund Description    |  |  |  |
| 1æ                     | General Quick Access                |      |  | T               | T                | T                | T                | <b>T</b>            |  |  |  |
| 909                    | SIT - CA EREO ES I SPDR 2023-1(1)   |      |  | PFL-4           | CON04            | CON04            | CON              | CLIN00101: ERFO     |  |  |  |
|                        | 1 511 - CA ERPO PS ESPOR 2025-1(1)  |      |  | PFL-3           | CON03            | CON03            | CON              | Option X            |  |  |  |
| <b>(</b> \$}           | + Documents                         |      |  | PFL-2           | CON02            | CON02            | CON              | CLIN00101: ERFO     |  |  |  |
|                        | Document Search                     |      |  | PFL-1           | CON01            | CON01            | CON              | CLIN00101: Non-ERFO |  |  |  |
|                        | Project Report Gallery              |      |  |                 |                  |                  |                  |                     |  |  |  |
|                        | Project Calendar                    |      |  |                 |                  |                  |                  |                     |  |  |  |
|                        | <ul> <li>Fund Management</li> </ul> |      |  |                 |                  |                  |                  |                     |  |  |  |
|                        | Project Fund List                   |      |  |                 |                  |                  |                  |                     |  |  |  |
|                        | Project Fund Transaction            |      |  |                 |                  |                  |                  |                     |  |  |  |
|                        | Funding Rules                       |      |  |                 |                  |                  |                  |                     |  |  |  |

Figure 143: Project Fund List Page

2. In the list page, select the appropriate record, and then click **View**.

| PRO | PROJECT FUND LIST |                 |                  |                      |                     |                  |  |  |  |  |  |  |
|-----|-------------------|-----------------|------------------|----------------------|---------------------|------------------|--|--|--|--|--|--|
| _0  | Edit              | 💿 View 🔟 Delete | 🕅 Workflow 👻 🐒   | Select Actions 👻 📋 R | eports 👻 🙋 Mail Mer | ge 🔹 💮 More      |  |  |  |  |  |  |
|     | 0                 | Project Fund ID | Fund Source Name | Fund Source Code     | Fund Source Type    | Fund Description |  |  |  |  |  |  |
|     |                   | T               | Ţ                | T                    |                     | T                |  |  |  |  |  |  |
|     | 0                 | PFL-4           | CON04            | CON04                | CON                 |                  |  |  |  |  |  |  |

Figure 144: Using View Option
# The form details page is displayed.

| PROJECT FUND LIST      |                                  |                              |             |                    |           |  |  |  |  |
|------------------------|----------------------------------|------------------------------|-------------|--------------------|-----------|--|--|--|--|
| _🖉 Edit 🏽 🛞 Cancel 🔤 N | Workflow 🔻                       |                              |             |                    |           |  |  |  |  |
| Project Fu             | und ID : PFL-3                   |                              |             |                    |           |  |  |  |  |
| Fund Source            | Name *: CON03                    |                              |             |                    |           |  |  |  |  |
| Fund Source            | Code : CON03                     |                              |             |                    |           |  |  |  |  |
| Fund Source            | eType : CON                      |                              |             |                    |           |  |  |  |  |
| Fund Source Cat        | tegory : FLAP                    |                              |             |                    |           |  |  |  |  |
| Fund Descr             | iption :                         | 4                            | ۵.<br>۲     |                    |           |  |  |  |  |
| Account Nເ             | umber : 1516043027<br>1604000000 | 201.540.CN.V700.04<br>.25255 |             |                    |           |  |  |  |  |
| Account P              | riority : CON03-CON              | 104                          |             |                    |           |  |  |  |  |
| Authorized Amou        | unt (\$) :                       | 0.00                         |             |                    |           |  |  |  |  |
| Expended Amou          | unt (\$) :                       | 0.00                         |             |                    |           |  |  |  |  |
| Probable Expendit      | ure (\$) :                       | 0.00                         |             |                    |           |  |  |  |  |
| Remaining Amou         | unt (\$) :                       | 0.00                         | 1           |                    |           |  |  |  |  |
|                        | Notes :                          | 4                            | •           |                    |           |  |  |  |  |
| ATTACHMENTS            |                                  |                              | 8           |                    |           |  |  |  |  |
| <b>⊵</b>               |                                  |                              |             |                    |           |  |  |  |  |
| File View Status       | Document Name                    | Url/Link Title               | Uploaded By | Uploaded Date      | File Size |  |  |  |  |
| Ready                  | Fund Management in<br>FHWA.docx  | NA                           | Mike Ross   | 07-27-2023 4:31 AM | 12.77KB   |  |  |  |  |
| Ready                  | PFL with data.jpg                | NA                           | Mike Ross   | 07-27-2023 4:30 AM | 92.13KB   |  |  |  |  |

Figure 145: Project Fund List Page in View Mode

3. In the ATTACHMENTS section, select the appropriate files, and then click  $\overset{\bullet}{-}$ .

| Edit 🙁 Cancel 🖄   | Workflow 👻  |                |          |                          |  |           |
|-------------------|---|----------------|----------|--------------------------|--|-----------|
| Account P         | riority : CON03-CON   | 04             |          |                          |  |           |
| Authorized Amo    | unt (\$) :  |                | 0.00     |                          |  |           |
| Expended Amo      | unt (\$) :  |                | 0.00     |                          |  |           |
| Probable Expendit | ure (\$) :  |                | 0.00     |                          |  |           |
| Remaining Amo     | unt (\$) :  |                | 0.00     |                          |  |           |
|                   |   |                |          |                          |  |           |
|                   | Notes :   |                | •        |                          |  |           |
| TACHMENTS         | Notes :   |                | <b>A</b> |                          |  |           |
|                   | Notes :   |                | A<br>V   |                          |  |           |
| TACHMENTS         | Notes :   | Url/Link       | Title    | Uploaded By              | Uploaded Date                              | File Size |
| TACHMENTS         | Notes :<br>Document Name<br>Fund Management in<br>FHWA.docx | Url/Link<br>NA | Title    | Uploaded By<br>Mike Ross | <b>Uploaded Date</b><br>07-27-2023 4:31 AM | File Size |

Figure 146: Using Download Option

- To access and download files attached to a workflow:
  - 1. In the navigation pane, click the appropriate form.
    - The form list page is displayed.

|            | PROJECTS                                   | PROJEC | CT FUND LIST     |                      |                  |                  |                     |
|------------|--|--------|------------------|----------------------|------------------|------------------|---------------------|
| Q,         | Type to Search 🗙 🗙 🔨                       | D Nev  | w 🕅 Workflow 👻 📋 | Reports 👻 🖓 Excel Ex | kport 🔹 💮 More 👻 |                  |                     |
| 혥          | SIT - CA ERFO F5 LSPDR 2023-1(1 💌          | 0      | Project Fund ID  | Fund Source Name     | Fund Source Code | Fund Source Type | Fund Description    |
| Г.         | General Quick Access                       |        | T                | T                    | <b>T</b>         | T                | <b>T</b>            |
| nnA        | SIT - CA EREO ES I SPDR 2023-1/1)          |        | PFL-4            | CON04                | CON04            | CON              | CLIN00101: ERFO     |
|            |  |        | PFL-3            | CON03                | CON03            | CON              | Option X            |
| <b>Q</b> } | + Documents                                |        | PFL-2            | CON02                | CON02            | CON              | CLIN00101: ERFO     |
|            | Document Search                            |        | PFL-1            | CON01                | CON01            | CON              | CLIN00101: Non-ERFO |
|            | <ul> <li>Project Report Gallery</li> </ul> |        |                  |                      |                  |                  |                     |
|            | Project Calendar                           |        |                  |                      |                  |                  |                     |
|            | <ul> <li>Fund Management</li> </ul>        |        |                  |                      |                  |                  |                     |
|            | Project Fund List                          |        |                  |                      |                  |                  |                     |
|            | Project Fund Transaction                   |        |                  |                      |                  |                  |                     |
|            | Funding Rules                              |        |                  |                      |                  |                  |                     |

Figure 147: Project Fund List Page

- 2. In the list page, select the appropriate record.
- 3. In the **WORKFLOW** group, click **History**.



Figure 148: Using History Option

#### The Workflow Status & History dialog box is displayed.

| Workflow Status & H   | listory               |                   | ×                     |  |  |  |  |  |
|-----------------------|-----------------------|-------------------|-----------------------|--|--|--|--|--|
| Workflow Status       |                       |                   | Hide 🔨                |  |  |  |  |  |
| Selected              | Status Cur            | rent Status       |                       |  |  |  |  |  |
| Published     Approve |                       |                   |                       |  |  |  |  |  |
| Workflow History      |                       |                   | Hide 🔨                |  |  |  |  |  |
| Workflow Status :     | Published             | Workflow Status : | Approved              |  |  |  |  |  |
| Received On :         | 07-26-2023 7:34:08 AM | Received On :     | 07-27-2023 5:32:06 AM |  |  |  |  |  |
| Action :              | Approve               | Action :          |                       |  |  |  |  |  |
| Action Notes :        |                       | Action Notes :    |                       |  |  |  |  |  |
| Action By :           | Mike Ross             | Action By :       |                       |  |  |  |  |  |
| Due Date :            | 07-26-2023 7:34:08 AM | Due Date :        | 07-27-2023 5:32:06 AM |  |  |  |  |  |
| Action Status :       | Action Completed      | Action Status :   | Action Pending        |  |  |  |  |  |
|                       | More Details          | Cancel            |                       |  |  |  |  |  |

Figure 149: Workflow Status & History Dialog Box

- X Workflow Status & History Workflow Status Hide 🖍 Selected Status **Current Status** Approved Published Approve Workflow History Hide 🔺 Workflow Status : Published Workflow Status : Approved Received On: 07-26-2023 7:34:08 AM Received On: 07-27-2023 5:32:06 AM Action : Approve Action : Action Notes : Action Notes : Action By: Mike Ross Action By : Due Date: 07-26-2023 7:34:08 AM Due Date: 07-27-2023 5:32:06 AM Action Status : Action Completed Action Status : Action Pending More Details Cancel
- 4. To view all the attachments and complete workflow history, click **More Details**.

Figure 150: Using More Details Option

# The **History** page is displayed.



Figure 151: History Page

5. In the ATTACHMENTS section, select the appropriate documents, and then click  $\overset{\bullet}{-}$ .

| HISTO        | DRY              |                                 |          |                    |            |                    |           |          |
|--------------|------------------|---------------------------------|----------|--------------------|------------|--------------------|-----------|----------|
| <b>%)</b> ci | ose              |                                 |          |                    |            |                    |           |          |
|              | Draft            | 07-26-2023 7:34 AM              | Publish  |                    |            | 07-26-2023 7:34 AM | User10    |          |
| 9            | Published        | 07-26-2023 7:34 AM              | Approve  |                    |            | 07-27-2023 5:32 AM | Mike@01   |          |
|              | Approved         | 07-27-2023 5:32 AM              |          |                    |            |                    |           |          |
| 4            |                  |                                 | Show Wo  | orkflow History Re | port       |                    |           | Þ        |
| ΑΤΤΑ         | CHMENTS          |                                 |          |                    |            |                    |           |          |
| ø            | 2                |                                 |          |                    |            |                    |           |          |
|              | File View Status | Document Name                   | Url/Link | Title              | Uploaded I | By Uploaded        | Date F    | ile Size |
|              |                  | Fund Management in<br>FHWA.docx | NA       |                    | Mike Ross  | 07-27-2023         | 5:32 AM 1 | 2.77КВ   |

Figure 152: Using Download Option

# 4.1.3. Deleting Attached Files

#### Prerequisites

You can delete a file only if you have attached it.

### Overview

You can delete files that are attached to forms. You cannot delete files that are attached while performing a workflow action.

The **Project Fund List** form is used for illustration purposes.

# Steps

- 1. To access the appropriate file attached to a form to be deleted, perform the following steps:
  - a. In the navigation pane, click the appropriate form. The form list page is displayed.

| Type to Search Image: New Workflow -   SIT - TRINITY COUNTY HBP BRIDGES   General   Quick Access   SIT - TRINITY COUNTY HBP BRIDGES   SIT - TRINITY COUNTY HBP BRIDGES   SIT - TRINITY COUNTY HBP BRIDGES   Image: New Workflow -   Image: Project Rend ID   Fund Source Name   Fund Source Code   Fund Source Code   Image: Project Rend ID   Image: Project Calendar  | PROJECTS                             |              | PRO | DJECT | FUND LIST       |                  |                  |                  |
|--|--------------------------------------|--------------|-----|-------|-----------------|------------------|------------------|------------------|
| SIT - TRINITY COUNTY HBP BRIDGES   General   Quick Access   SIT - TRINITY COUNTY HBP BRIDGES   SIT - TRINITY COUNTY HBP BRIDGES   SIT - TRINITY COUNTY HBP BRIDGES   + Documents   Document Search   Project Report Gallery   Project Calendar   - Fund Management   | <b>A</b> Type to Search              | × × ^        | Ð   | New   | ₩ Workflow •    | 🗐 Reports 👻 🕅    | Excel Export 🔹 💮 | More 💌           |
| General       Quick Access         SIT - TRINITY COUNTY HBP BRIDGES         + Documents         Document Search         Project Report Gallery         Project Calendar         - Fund Management  | SIT - TRINITY COUNTY H               | BP BRIDGES 🔻 |     | 0     | Project Fund ID | Fund Source Name | Fund Source Code | Fund Source Type |
| <ul> <li>SIT - TRINITY COUNTY HBP BRIDGES</li> <li>Documents</li> <li>Document Search</li> <li>Project Report Gallery</li> <li>Project Calendar</li> <li>Fund Management</li> </ul>  | General                              | Quick Access |     |       | T               | T                | T                | ۲                |
| <ul> <li>PFL-1</li> <li>CON01</li> <li></li></ul> |                                      |              |     |       | PFL-2           | CON02            | CON02            | CON              |
| <ul> <li>+ Documents</li> <li>Document Search</li> <li>Project Report Gallery</li> <li>Project Calendar</li> <li>Fund Management</li> </ul>  |                                      |              |     |       | PFL-1           | CON01            | CON01            | CON              |
| Document Search     Project Report Gallery     Project Calendar     Fund Management  | + Documents                          |              |     |       |                 |                  |                  |                  |
| <ul> <li>Project Report Gallery</li> <li>Project Calendar</li> <li>Fund Management</li> </ul>  | Document Search                      | 1            |     |       |                 |                  |                  |                  |
| <ul> <li>Project Calendar</li> <li>Fund Management</li> </ul>  | Project Report Ga                    | allery       |     |       |                 |                  |                  |                  |
| - Fund Management  | <ul> <li>Project Calendar</li> </ul> | 8            |     |       |                 |                  |                  |                  |
|  | 🗕 Fund Manageme                      | nt           |     |       |                 |                  |                  |                  |

Figure 153: Project Fund List Page

# b. Click More, and then click Attachments.

The attachments of all the records are listed.

| PRO | PROJECT FUND LIST |                 |                  |         |             |        |           |  |  |  |  |
|-----|-------------------|-----------------|------------------|---------|-------------|--------|-----------|--|--|--|--|
| Ð   | New               | 🖈 Workflow 👻 📋  | O More ▼         |         |             |        |           |  |  |  |  |
|     | 0                 | Project Fund ID | Fund Source Name | Fund So | Customize   | e List | urce Type |  |  |  |  |
|     |                   | T               | T                |         | Attachme    | nts    | T         |  |  |  |  |
|     | 0                 | PFL-4           | CON04            | CON04   | R Audit Log |        |           |  |  |  |  |
|     |                   | PFL-3           | CON03            | CON03   |             | CON    |           |  |  |  |  |
|     |                   | PFL-2           | CON02            | CON02   |             | CON    |           |  |  |  |  |
|     |                   | PFL-1           | CON01            | CON01   |             | CON    |           |  |  |  |  |

Figure 154: Using Attachments Option

Various document management features are available for attachments.

| PR | OJECT FUND LIST DOCUME | NTS                                    |         |          |        |      |            |                    |
|----|------------------------|--|---------|----------|--------|------|------------|--------------------|
| ⊕  | Back 💮 More 🕶          |  |         |          |        |      |            |                    |
|    | Record Identifier      | Document Name                          | Version | Url/Link | Title  | Туре | Size       | Created On         |
|    |                        |  |         |          | T      | T    |            | MM/dd/ 🔠 🗿 🔽       |
|    | PFL-2 / CON02          | Project_Fund_List_Att<br>achments_FHWA | 1       |          | Angela | PDF  | 7574.29 KB | 12/14/2023 6:32 AM |

Figure 155: List of Attachments

2. To delete an attachment, select the appropriate file, and then click  $\square$ .

| ATTAC | ATTACHMENTS                   |  |          |                    |             |                    |           |  |  |  |
|-------|-------------------------------|--|----------|--------------------|-------------|--------------------|-----------|--|--|--|
|       |                               |  |          |                    |             |                    |           |  |  |  |
| ~     | File View Status              | Document Name                          | Url/Link | Title              | Uploaded By | Uploaded Date      | File Size |  |  |  |
|       | Ready                         | Project Fund List Attac<br>hments FHWA | NA       | Project_Fund_List_ | Angela      | 12/14/2023 6:32 AM | 7574.29KB |  |  |  |
| Link  | Link Document Upload Document |  |          |                    |             |                    |           |  |  |  |



# 4.2. Importing Form Details from an Excel Workbook

You can perform the following tasks using a Microsoft Excel workbook:

- <u>4.2.1. Create multiple records simultaneously.</u> You can create multiple form records by importing form information from a Microsoft Excel workbook to the form.
- <u>4.2.2. Update details of multiple records simultaneously.</u> You can update form information of multiple records simultaneously by importing form information from a Microsoft Excel workbook to the form.

The template to upload or update information of multiple records to a form is downloaded as a Microsoft Excel workbook from the list page of the form. The Excel template workbook is updated with the form information and is uploaded back to the form.

The **Instructions** tab in the Microsoft Excel workbook template provides information on updating the template for uploading multiple records.

Note: The following pointers enable you to upload or update form information correctly:

- For lists and selection options, ensure the correct spelling of the option as defined in the application is entered
- For Yes/No options, enter Yes or No in the relevant columns
- For updating form information, ensure the Internal ID refers correctly to the intended record
- You cannot delete records or upload attachments using an Excel workbook
- Calculated fields will not be available in the template
- Validation rules for data entered in the template and the values entered in the form are the same

# 4.2.1. Uploading Form Details in Bulk

#### Steps

 In the navigation pane, click a form. The selected form list page is displayed.

|            | PROJECTS                                  | LABOR/EC | UIPMENT  |                     |                          |                    |  |  |
|------------|---|----------|--|---------------------|--------------------------|--------------------|--|--|
| Q, 1       | Type to Search 🗙 🗙 🔨                      | 🞝 New    | 🞝 New 🖹 Reports 👻 💱 Excel Import / Export 👻 💬 More 👻 |                     |                          |                    |  |  |
| 諭          | SIT - CA ERFO FS LSPDR 2023- 💌            | 0        | Labor/Equipment                                      | Type/Classification | Supplemental Description | Move-In Date       |  |  |
| <b>I</b> ≩ | General Quick Access                      | -        |  |                     | <b>T</b>                 | MM/dd/yyy 📅 🍸      |  |  |
|            | <ul> <li>Contracts</li> </ul>             | 0        | Equipment  | Pickup Truck        | Supervisor               | 04/30/2024         |  |  |
| -          |   |          | Equipment  | Haul Truck          |                          | 04/30/2024         |  |  |
| vậr        | <ul> <li>SIT - CA ERFO FS LSPD</li> </ul> |          | Equipment  | Haul Truck          |                          | 04/30/2024         |  |  |
|            | + Documents                               |          | Equipment  | Haul Truck          |                          | 04/30/2024         |  |  |
|            | + Configurations                          |          | Equipment  | Excavator 300G      |                          | 04/30/2024         |  |  |
|            | Contract Items                            |          | Labor  | Excavator operator  |                          | 04/30/2024         |  |  |
|            | <ul> <li>Progress Tracking</li> </ul>     |          | Labor  | Suveyor             |                          | 04/30/2024         |  |  |
|            | <ul> <li>Contractor Daily</li> </ul>      |          | Equipment  | D6 Dozer            |                          | 04/30/2024         |  |  |
|            | Inspector Daily R                         |          | Equipment  | Water Truck         |                          | 04/30/2024         |  |  |
|            | <ul> <li>Daily Diary</li> </ul>           |          | Labor  | Operator            | 2                        | 04/30/2024         |  |  |
|            | <ul> <li>Labor/Equipment</li> </ul>       |          | Labor  | Operator            | 3                        | <b>04/30/202</b> 4 |  |  |
|            | Work Activity Te                          |          | Labor  | Labor               | 2                        | 04/30/2024         |  |  |
|            | + Billings & Payments                     |          | Labor  | Operator            | 1                        | 04/30/2024         |  |  |
|            | <ul> <li>Contract Modificati</li> </ul>   |          |  |                     |                          |                    |  |  |
| >          | <ul> <li>Submittals</li> </ul>            |          | 1 2 🕨 ы  |                     |                          |                    |  |  |

Figure 157: List Page

# 2. In the tool bar, click Excel Import / Export.



Figure 158: Excel Import / Export

3. To export the form template to an Excel workbook, click **Excel Template**.

The Excel workbook template is downloaded to the local storage.

4. Open the saved Excel workbook template, enter form details in the various columns, and save the updated Excel workbook. For information on column details, refer to the corresponding topic on creation of the form.

Note: The first column with the heading Internal ID must not be filled in.

#### Federal Highway Administration

5. In the list page, click **Excel Import / Export**, and then click **Excel Import**.



Figure 159: Excel Import

# The IMPORT DETAILS FROM EXCEL FILE page is displayed.

| IMPORT DETAILS FROM EXCEL FILE |                            |
|--------------------------------|----------------------------|
| 🕞 Back                         |                            |
| Select File                    | Choose File No file chosen |
|                                | Upload Save                |

Figure 160: Import Details From Excel File

6. Click **Choose File** to select the workbook with updated form information. The **Choose File to Upload** dialog box is displayed.

| 💽 Open                              |   |                |      |                  | ×       |
|-------------------------------------|---|----------------|------|------------------|---------|
| $\leftarrow \rightarrow \checkmark$ | $\uparrow \uparrow \downarrow \rightarrow \text{Downloads}$ | $\sim$ (       | 3    | Search Downloads | Q       |
| Organize 🔹                          | New folder  |                |      | ≣                | - 🔳 😗   |
| > 🚞 V                               | Name  |                | D    | ate modified     | Туре    |
|                                     | ∽ Ioday   |                |      |                  |         |
| *                                   | Labor_Equipment_Template                                    |                | 7/   | /1/2024 7:57 PM  | Microso |
| <b>↓</b> *                          | ⊻ Last week   |                |      |                  |         |
| De De                               |   |                |      |                  |         |
|                                     | File name: Labor_Equipment_Ter                              | mplate         | ~    | All files        | v       |
|                                     |   | Upload from mo | bile | Open             | Cancel  |
|                                     |   | Upload from mo | bile | Open             | Cancel  |

Figure 161: File to Upload

7. Select the required workbook, and then click **Open**.

8. Click **Upload** to import form information from the Excel workbook to the form.



Figure 162: Upload the Excel

On successful import, the success message is displayed.

- 9. On encountering errors while importing an Excel workbook, perform the following steps:
  - a. In the toolbar, click Error Log.



Figure 163: Error Log Option

The error log workbook is downloaded to your local storage.

- b. Open the workbook to view the errors in the various columns.
   Error messages in the cells are highlighted in red. Tabs in the workbook are also highlighted to indicate the presence of errors.
- c. Open the Excel workbook with form information and modify form details. Optionally, you can make relevant corrections in the error log workbook and upload it.
- d. Save and upload the Excel workbook to import the updated information.

# 10. Click Save.

The items in the Excel workbook are uploaded to the list page.

# 4.2.2. Updating Form Details in Bulk

#### Steps

 In the navigation pane, click a form. The selected form list page is displayed.

|                          | PROJECTS                                    | LABOR/EQUIPMENT |  |                     |                          |                    |
|--------------------------|---|-----------------|--|---------------------|--------------------------|--------------------|
| 🔍 Type to Search 🛛 🗙 🗸 🔨 |   | Dew             | 🖹 Reports 👻 🛱 Excel Import / Export 👻 💬 More 👻 |                     |                          |                    |
|                          | SIT - CA ERFO FS LSPDR 2023- 💌              | 0               | Labor/Equipment                                | Type/Classification | Supplemental Description | Move-In Date       |
| Г                        | General Quick Access                        |                 |  |                     | T                        | MM/dd/yyy 📅 🍸      |
| 008                      | <b>A</b>                                    |                 | Equipment                                      | Pickup Truck        | Supervisor               | 04/30/2024         |
|                          | — Contracts                                 |                 | Equipment                                      | Haul Truck          |                          | 04/30/2024         |
| ŝ                        | <ul> <li>— SIT - CA ERFO FS LSPD</li> </ul> |                 | Equipment                                      | Haul Truck          |                          | 04/30/2024         |
|                          | + Documents                                 |                 | Equipment                                      | Haul Truck          |                          | 04/30/2024         |
|                          | + Configurations                            |                 | Equipment                                      | Excavator 300G      |                          | 04/30/2024         |
|                          | Contract Items                              |                 | Labor  | Excavator operator  |                          | 04/30/2024         |
|                          | <ul> <li>Progress Tracking</li> </ul>       |                 | Labor  | Suveyor             |                          | 04/30/2024         |
|                          | Contractor Daily                            |                 | Equipment                                      | D6 Dozer            |                          | 04/30/2024         |
|                          | Inspector Daily R                           |                 | Equipment                                      | Water Truck         |                          | 04/30/2024         |
|                          | Daily Diary                                 |                 | Labor  | Operator            | 2                        | 04/30/2024         |
|                          | <ul> <li>Labor/Equipment</li> </ul>         |                 | Labor  | Operator            | 3                        | <b>04/30/202</b> 4 |
|                          | Work Activity Te                            |                 | Labor  | Labor               | 2                        | 04/30/2024         |
|                          | + Billings & Payments                       |                 | Labor  | Operator            | 1                        | 04/30/2024         |
|                          | <ul> <li>Contract Modificati</li> </ul>     |                 |  |                     |                          |                    |
| >                        | <ul> <li>Submittals</li> </ul>              |                 | 1 2 🕨 🕅  |                     |                          |                    |

Figure 164: List Page

2. In the tool bar, click Excel Import / Export.

| LABOR/EQUIPMENT        |   |
|------------------------|---|
| 🖡 New 📓 Reports 🔻      | Rit Excel Import / Export ▼ 💬 More ▼  |
| No records to display. | Excel Import       nental Description         Excel Export (xls)       T         Excel Export (xlsx)       T         Excel Template (xlsx)       T         Excel Template (xlsx)       T         Excel Template (xlsx)       T         Excel Template With Data (xls)       T         Excel Template With Data (xlsx)       T |
|                        |   |

Figure 165: Excel Template With data

3. Click **Excel Template With Data (xls)** or **Excel Template With Data (xlsx)** to export the form details to an Excel workbook.

The Excel workbook template is downloaded to the local storage.

- 4. To update existing information, perform the following steps:
  - a. Open the saved Excel workbook.

The first column named **InternalID** displays the unique identification code for the corresponding record of the form.

- b. Update form details in the various columns, and delete the records that need not be updated.
   For information on column details, refer the corresponding topic on creation of the form.
   Note: Deleting a record from the Excel workbook does not delete the record in the form.
- c. Save the updated Excel workbook.

**Note:** To create new form records, in the same Excel workbook, do not enter information in the **Internal ID** column, and enter all other required and mandatory columns.

5. In the list page, click **Excel Import / Export**, and then click **Excel Import**.



Figure 166: Excel Import

# The IMPORT DETAILS FROM EXCEL FILE page is displayed.

| IMPORT DETAILS FROM EXCEL FILE |                            |  |  |  |  |  |
|--------------------------------|----------------------------|--|--|--|--|--|
| Back                           |                            |  |  |  |  |  |
| Select File                    | Choose File No file chosen |  |  |  |  |  |
|                                | Upload Save                |  |  |  |  |  |

Figure 167: Import Details from Excel File

- 6. Click **Choose File** to select the workbook with updated form information. The **Choose File to Upload** dialog box is displayed.
- 7. Select the required workbook, and then click **Open**.
- 8. Click **Upload** to import form information from the Excel workbook to the form. On successful import, the success message is displayed.
- 9. On encountering errors while importing an Excel workbook, perform the following steps:
  - a. In the toolbar, click Error Log.



Figure 168: Error Log Option

The error log workbook is downloaded to your local storage.

b. Open the workbook to view the errors in the various columns.

Error messages in the cells are highlighted in red. Tabs in the workbook are also highlighted to indicate the presence of errors.

- c. Open the Excel workbook with form information and modify form details.
  - Optionally, you can make relevant corrections in the error log workbook and upload it.
- d. Save and upload the Excel workbook to import the updated information.

# 10. Click Save.

The items in the uploaded Excel workbook are uploaded to the list page.