Introduction to Masterworks Participant Guide

# U.S. Department of Transportation Federal Highway Administration

# **Introduction to Masterworks Participant Guide**



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# 2. Introduction to Using the Participant Guide

The Participant Guide helps you start using the Masterworks application and its user interface and various elements to navigate through the key processes in the application quickly.

The options selected for use in this guide are for instructional purposes to showcase the various features in the Masterworks application. 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 the End User Manual/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. Aurigo Masterworks Overview

# **3.1. Logging into Masterworks**

## Prerequisites

Access to any modern web browser. Preferably Google Chrome or Microsoft Edge.

## Overview

You can login to the Masterworks application using your network credentials.

## Steps

- 1. Click the <u>https://fhwa.masterworkslive.com/</u> link. The **Terms and Conditions** page is displayed.
- 2. Read the rules and guidelines for using the application, and then click **Continue** to Login. The login page is displayed.

	Federal Hi Administra	ghway Ition
User Nan	ne ame	
Password Passw	rord	
	Sign in	
New User!		Forgot Password
	OR	
2	Sign in with O	da

Figure 1: Login Page

- 3. Enter your credentials.
- 4. Click Sign in.

- 5. To login via **Okta**, perform the following steps:
  - a. Click Sign in with Okta

The Sign in page displays Sign in with FAA MyAccess and Sign in with LOGIN.GOV

b. Select the appropriate option

# 3.2. Introduction to the Masterworks User Interface

Every time you log in, you are navigated to the Masterworks Home page. In the application, the modules and information available to you are based on the following factors:

- Roles assigned to you
- Projects to which you are invited
- Current workflow status of the form

The high-level modules, elements, and features available in Masterworks User Interface (UI) is illustrated in the following figure:

HOME			ENTERPRISE DASHBOARD			
ype to Search	×	~~	Select Dashboard: 🗸	[] New	 	
Notifications 1,123	)					
Enterprise Search	_	_				
<ul> <li>Document Search</li> </ul>						
Fund Management						
<ul> <li>Report Gallery</li> </ul>						
<ul> <li>Ad-hoc Reports</li> </ul>						
<ul> <li>Ad-Hoc Unit Price S</li> </ul>	earch					
Recent Projects						

#### Figure 2: Masterworks User Interface

The UI of Masterworks contains various elements that are described as follows:

Number	Item	Description
1	Profile menu	You can view your profile, change your application password, log out, access the application Online Help, and view the application version information.
		Click your initials to view the options.

Number	Item	Description
		Home 🧬 🏍 PM
		View Profile
		Change Password
		Manage Two-factor Authentication
		Help
		About
		Logout
		Figure 3: Profile menu
		Note: The Manage Two-Factor Authentication option appears in
		the profile menu if the <b>Enable 2 Factor Authentication</b> field is
		selected in the <b>Administration</b> module.
2	Favorites	You can bookmark frequently used pages for easy and quick
3	Notification icon	The tasks awaiting your action are displayed for easy and quick
-		access from anywhere in the application.
		Click 🌲 to view the list of tasks awaiting your action.
		Home Te Ye
		My Tasks 🐯 🗙
		C Search by Project or Form X
		You have 53 tasks from last 7 days Last updated at 4:25 PM C
		Today
		Contract Name: Cont 01
		Updated to Awarded status 9:11 AM
		Contract Details + Due on 06-29-2023 + Show Details
		847046 CM bug test (1 Unread) 🔻
		PN061301
		Figure 4: My Tasks
		• The number displayed on the notification icon is the
		number of unread tasks awaiting your action.
		• The number of tasks listed is based on the value defined
		in the Filter Window Range (in Days) field in the
		Application Settings of the Administration module.

Number	Item	Description
		• In the My Tasks page, you can view the tasks awaiting your
		action, perform workflow actions, and filter and search
		the tasks based on projects or forms.
		Note: The tasks displayed are based on the most recent tasks
		awaiting your action.
4	Page Navigation	Displays the trail of page navigation links to track your location
	trails/Breadcrumbs	within the application.
		Click a link to open the page.
		> Starvation Lane Improvements > Bidding > Advertisement
		Starvation Lane Improvements
		Figure 5: Navigation Trail / Breadcrumbs
		Expand the breadcrumb trail to access the whole trail.
		> Starvation Lane Improvements > Bidding > Advertisement PM
		Home
		chments 7 Manage
		iomize List 77 Add
		Figure 6: Whole Navigation trail / Breadcrumbs
5	Form finder	You can quickly search any form in the navigation pane.
		номе
		Q sea X Y
		👔 = Enterprise Search
		ten = Document Search
		Figure 7: Form finder
		Enter the name of the form or part of the form name to easily find
		the form.
6	Module name	Displays the name of the module you are currently in.
7	Module menu	Buttons to access the various modules of Masterworks.
		Note: The availability of modules is based on the roles assigned .
0	Taggla button Dana	to you.
0	ioggie bullon – Pane	Docking the left pape provides more space to view information in
		the right nane
		Click to hide the left navigation pane
		Click to view the left navigation pane.
9	Left navigation pane	Links to the forms available in the module.
10	Right action pane	Displays the work area for forms and modules.
11	Loading bar	Displays in motion when the page is loading.

Number	Item	Description
12	Toggle button –	Button to show the module names in Masterworks.
	Modules	Click the toggle button $>$ to view the module names.
		НОМЕ
		C Type to Search
		Di Home
		Projects
		Library
		Administration
		Figure 8: Modules
		Click the toggle button 🔇 to hide the module names.

# 4. Common Application Features

This section describes the key features of the application that are commonly available in most forms. These features enable you to perform routine tasks.

# 4.1. Common Screen Icons and Controls

The following tables provide a quick reference of tasks that you can perform in a form using common screen options and controls. Information, screen icons, and controls available to you in the application are based on the following:

- Roles assigned to you in the enterprise
- Projects you are invited to
- Roles assigned to you in a project

The following option groups are described:

- <u>Toolbar options</u>
- Navigation pane controls
- <u>Page navigation controls</u>
- <u>Others</u>

# **Toolbar Options**

Options available to you in the toolbar are contextual. On the list page of a form, all global functionalities are available when no records are selected. Record-specific functionalities are available based on the number of records (single or multiple) selected on the list page.

Tool	Icon	Function
New	New	Create a new form.
Edit	_Ø Edit	Edit form information.
View	♥ View	View form information.
Delete	TTT Delete	Delete the record.
Сору	🗋 Сору	Create a new form by copying specific information from a selected form.
History	History	<ul> <li>View the workflow history of the selected form.</li> <li>Display the attachments added or linked to the form on a workflow transition.</li> </ul>
Associate	e Associate	Change the default workflow of a form.

Tool	Icon	Function
Workflow	မိုး Workflow User(s)	Select specific users to mandatorily take a workflow action.
User(s)		
Show Pending	8 Show Pending On User(s)	Show/hide the <b>Pending On User(s)</b> column on the list page. The
on User(s) /		Pending On User(s) column displays the users names of
Hide Pending		stakeholders on whom the workflow action is pending.
on User(s)		
Select	🔮 Select Actions 🗸	Perform a workflow action to transition a record from its current
Actions		workflow stage to the subsequent workflow stage.
Reports	🖹 Reports 👻	View reports related to the form.
Attachment	2	Access files that are attached to the records of a form.
	_	
Audit Log	R Audit Log	View the following information for each form:
		Addition of a record
		Deletion of a record
		Modification of a record
Filters	T	Search for specific records that match the criteria you provide.
Previous	1	Displays the previous record.
Record	-	
Next Record	•	Displays the next record.
Reorder	[j] Reorder	Reorder items to move within the container or to other
		containers.
Refresh Line	Refresh Line Number	Sets line numbers of items in a sequential order. Primarily used
Number		after deleting an item.
Flat List	Flat List	View the items as a list without the grouping of containers or
		groups.
Records	2 Selected X	View the number of records selected in a list page. Also, to
Selection		deselect all selected rows, click 🔟 .
More	O More ▼	View additional features available in the toolbar.
1		

# **Navigation Pane Controls**

Icon	Function
+	Expands the group in the navigation pane to view the nodes in the group.
—	Collapses the group in the navigation pane.
~	Expands the tree structure in the navigation pane.
^	Collapses the tree structure in the navigation pane.
	Expands the folder in the navigation pane to view the nodes in the folder.

# **Page Navigation Controls**

Icon	Function
	Navigate to first page
	Navigate to previous page
	Current page
1 2 3	Pages
	Navigate to next page
I	Navigate to last page

# Others

Term	Description	Function		
Sort and Filter	General sort and filter options	Sort or search for specific records that match criteria you provide in tables. <b>Sort:</b> Click the required column name to sort records in that column. Click once to sort the column in ascending order, click twice to sort the column in descending order, click thrice to reset to the default order.		
		<ul> <li>Filter:</li> <li>1. Enter the search criteria in the filter text box in the required column.</li> <li>2. Click .</li> <li>3. Click the appropriate filter option for the specified filter criteria.</li> <li>4. To use a filter expression, select the appropriate logical operator and then click Filter.</li> </ul>		
Contextual Menu Options	Toolbar options at the record	On selecting a record in a list page, the contextual menu option is made available in the first or third column. When you click this menu, the list of contextual functions you can perform is displayed.		
Page load	Page load indicator	Indicates that information in the page is loading. It is recommended that you perform any action in the application only after the page completes loading.		
Session time	Pop-up with	The session timeout notification is displayed after the specified		
out	session time out	time duration before the application logs off automatically.		
	details	Click <b>Continue</b> to continue the current session.		

Term	Description	Function
Tooltip	Additional	When you hover over the mouse pointer or click the 🕐 icon, a
	information about	brief description or hint about the particular UI element is
	an UI element,	displayed.
	such as text box,	
	drop- down, or	
	check box.	

# 4.2. Working with List Page Elements

You can perform these tasks on list page of a form.

• Sorting on List Page Columns

To sort records on a list page, click the required column name to sort records in that column.

- Click once to sort the column in ascending order
- o Click twice to sort the column in descending order
- o Click thrice to reset to the default order



Figure 9: Sorting on List Page

# • Grouping Records in List Pages

You can group records based on the values in a column. To group records, right-click the required column, and then click **Group By**. To ungroup, right-click the required column, and then click **Ungroup**.

GLO	BAL F	UND LIST			
Ð,	New	₩ Workflow ▼	🗐 Reports 🔻	Fit Excel I	mport / Export 👻 🤆
	0	Fund Source ID	Fund Sour	ce Name	Fund Source Code
		GFL-148	🔡 Ungroup		123456
		GFL-145	TECH		TECH

Figure 10: Grouping Records in List Page

# 4.3. Form Filters

In a list page of a form in the application, you can search for specific records that match the criteria you provide. Records that match the criteria defined are displayed on the list page. You can also define and save search criteria as pre-defined filters.

If you apply multiple filters successively, the results are based on the collective search criteria. That is, if you apply a filter, then follow it up with another filter on a different column, then the second filter is applied on the results of the first filter. You can search for records using either of the following ways:

## 4.3.1. Enter search criteria

4.3.3. Use a pre-defined filter

Refer to the following topics to manage filters:

4.3.2. Saving a Filter

- 4.3.4. Setting a Filter as the Default
- 4.3.5. Editing a Filter Name

# 4.3.1. Filtering Using Search Criteria

#### Overview

The following procedure describes the steps to search for records by defining the search criteria. The **PROJECTS** list page is used here as an example.

#### Steps

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

The **PROJECTS** list page is displayed.

PROJECTS			OJECTS	
Q,	ype to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🗸 📋 Reports 🛪 🖧	Manage Users – 🎼 Mark Offline/Online – 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
播	A Recent Projects		Y	T T
000	a Recent rojecto		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
SIT - CA ERFO FS LSPDR 2023-1(1)			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
<b>(</b>	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 11: Navigation to Project module

2. Enter the search criteria in the filter text box in the appropriate columns. For example, if you are searching for projects with **Business Unit** as Central Federal Lands, then in the **Business Unit** column, in the filter text box, enter Central Federal Lands.

PF	OJECTS					
Ð	New 🏽 🕅 Workflow 👻 🗞 Manage Users	Mark Offline/Online	💬 More 🕶			T
0	Project Code	Project Name	Project Description	Business Unit	Project Status	Active
				Central Federal Lands		
	SIT - CA ERFO FS LSPDR 2023-1(10)	SIT - Black Mountain R	ERFO spot repairs incl	Central Federal Lands	Design	2 f
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	<b>v</b>
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	~
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	SIT MT NPS GLAC 14(4	Reconstruction of 12	Western Federal Lands	Construction	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	
	SIT - CA ERFO FS LSPDR 2023-1(1) (1)	SIT - Black Mountain R	ERFO spot repairs incl	Central Federal Lands	Acquisitions	
	i					•
μ	✓ ✓ 1 2 3 4 5 6 7 8 9 10 ► ► Page 1 of 84					

#### Figure 12: Filtering Criteria

3. Click **Filter .** Various filter options are displayed to filter information on the column. The following image displays the filter options that are available for selection.

Business Unit	Project Status
Central Federal Lands	
Central Federal Lands	NO FIITER
Western Federal Lands	Contains
Western Federal Lands	Does Not Contain
Western Federal Lands	Starts With
Western Federal Lands	Ends With
Western Federal Lands	Equal To
Western Federal Lands	Not Equal To
Western Federal Lands	ls Empty
Western Federal Lands	Is Not Empty
Western Federal Lands	Clear All Filter

Figure 13: Filtering Options

The following table describes the available filter options.

Filter Option	Description
No Filter	Removes the filter criterion in that column.
Contains	Displays records that contain the characters as specified in the criterion.
Does Not Contain	Displays records that do not contain the characters as specified in the criterion.
Starts With	Displays records that contain the characters as specified in the criterion at the beginning of the column value.
Ends With	Displays records that contain the characters as specified in the criterion at the end of the column value.
Equal To	Displays records that exactly match the characters as specified in the criterion.
Not Equal To	Displays records that do not match the characters as specified in the criterion.
Is Empty	Displays records that do not have data in the column being filtered.
Is Not Empty	Displays records that have data in the column being filtered.
Clear All Filter	Deletes filter criterion in all the columns and displays all records.

4. Click the appropriate filter option for the specified filter criterion. Once the filter is applied, the blue-colored filter icon indicates the columns on which the records are filtered.

# 4.3.2. Saving a Filter

#### **Overview**

You can pre-define and save filters for future use. The following procedure describes the steps to define and save filter criteria as a pre-defined filter. The **PROJECTS** list page is used here as an example.

#### Steps

1. In the module menu, click **Projects**. The **PROJECTS** list page is displayed.

PROJECT5 PROJECTS 🖺 New 📓 Workflow 👻 📳 Reports 🗸 🗞 Manage Users 🎼 Mark Offline/Online 💮 More 🗸 Q Type to Search X (J) Project Code Project Name Project Description **Business Unit** 'n Select Project -T T Ī. Recent Projects SIT MT NPS GLAC 14(4) & MT NPS- Test GL... Rehabilitate Many Gla... Reconstruction of 12 ... Western Federal Lands 008 SIT - CA ERFO FS LSPDR 2023-1(1) SIT MT NPS GLAC 14(4) & MT NPS GLACIER ... Rehabilitate Many Gla... Reconstruction of 12 ... Western Federal Lands ٩ SIT MT NPS GLAC 14(4) & MT NPS GLACIER ... Rehabilitate Many Gla... Reconstruction of 12 ... Western Federal Lands All Projects SIT MT NPS GLAC 14(4) & MT NPS GLACIER ... Rehabilitate Many Gla... Reconstruction of 12 ... Western Federal Lands

Figure 14: Navigation to Projects module

#### Federal Highway Administration

2. Enter the search criteria in the filter text box in the appropriate columns.

PR	PROJECTS						
Ð	New 🖻 Workflow 👻 🗞 Manage Users	🛱 Mark Offline/Online	💮 More 🔹			T	
0	Project Code	Project Name	Project Description	Business Unit	Project Status	Active	
		T		Central Federal Lands			
	SIT - CA ERFO FS LSPDR 2023-1(10)	SIT - Black Mountain R	ERFO spot repairs incl	Central Federal Lands	Design		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	~	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	~	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	~	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction	~	
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	SIT MT NPS GLAC 14(4	Reconstruction of 12	Western Federal Lands	Construction		
	SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands	Construction		
	SIT - CA ERFO FS LSPDR 2023-1(1) (1)	SIT - Black Mountain R	ERFO spot repairs incl	Central Federal Lands	Acquisitions		
4.4						P.	
м	1 2 3 4 5 6 7 8 9 1	0 🕨 🕨				Page 1 of 84	

Figure 15: Filter

3. In the tool bar, click **T**. The **Filters** dialog box is displayed.



Figure 16: Filters Dialog Box

- 4. In the Save Applied Filter box, enter the name of the filter.
- 5. Click 🗸.

# 4.3.3. Using a Pre-Defined Filter

## Prerequisites

At least one saved filter exists.

## Overview

The following procedure describes the steps to use a pre-defined filter. The **PROJECTS** list page is used here as an example.

## Steps

In the module menu, click **Projects**.
 The **PROJECTS** list page is displayed.

	PROJECTS		PR	DJECTS			
Q, I	ype to Search 🗙 🗙	~	Ð	New 📲 Workflow 🛪 📳 Reports 🛪 🗞	Manage Users 🛛 🎼 Ma	rk Offline/Online 💮 N	lore 🔻
	Select Project	-	0	Project Code	Project Name	Project Description	Business Unit
I≩	Recent Projects			7		T	T
en 1				SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
	STI - CA ERFO FS LSPDR 2023-1(1)			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
(Q)	All Projects	- [		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
	L			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands

Figure 17: Navigation to Projects modules

2. In the tool bar, click  $\mathbf{T}$ .

The **Filters** dialog box is displayed.



Figure 18: Select and Apply Filter

- 3. In the **Select Filter** section, select the appropriate filter. Available options are filters defined for the page.
- 4. Click Apply Filter.

- 5. The filter is applied, and the color of the filter icon  $\square$  in the toolbar changes to blue.
- 6. Optionally, to clear the filter, in the tool bar, click **T** , and then click **Clear Filter**.

# 4.3.4. Setting a Filter as the Default Filter

## Prerequisites

At least one saved filter exists.

In the list page of a form, you can set a filter as default. On opening the list page, the page displays only records that match the filter criteria.

The following procedure describes the steps to define a default filter. The **Projects** list page is used as an example.

## Steps

1. In the module menu, click Projects.

The **Projects** list page is displayed.

	PROJECTS	PR	ојест5	
Q, I	ype to Search 🗙 🗙 🔨	Ð	New 🙀 Workflow 👻 📳 Reports 👻 🗞	Manage Users 🏽 🎼 Mark Offline/Online 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
1#	Recent Projects		Y	
en A			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
<b>(a</b> )	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 19: Navigation to Projects modules

2. In the tool bar, click  $\mathbf{T}$ .

The **Filters** dialog box is displayed.

FILTERS	Clear Filter *7
Save Applied Filter	
	✓ ×
Select Filter	
Business Uni	_⁄ ☆ ☆ 匝
	Apply Filter

Figure 20: Filters Dialog Box

- 3. In the **Select Filter** section, select the appropriate filter. Available options are filters defined for the page.
- 4. Click  $^{ch}$  to set the selected filter as default.

5. On loading the page, the default filter is automatically applied.

# 4.3.5. Editing Filter Details

You can modify the name of a filter, and replace the search criteria of a filter.

#### 4.3.5.1. Updating the Filter Name

#### **Overview**

You can update a filter name. The following procedure describes the steps to update the filter name. The **Projects** list page is used here as an example.

#### Steps

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

The **PROJECTS** list page is displayed.

	PROJECTS	PR	PROJECTS						
Q, 1	ype to Search X 🗙	Ð	New 🖟 Workflow - 🖹 Reports - 🖧	Manage Users 🛛 🎼 Mark Offline/Online 💮 More 👻					
	Select Project 👻	0	Project Code	Project Name Project Description Business Unit					
<b>1</b> 番	Recent Projects		T						
em®	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands					
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands					
<b>1</b>	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands					
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands					

Figure 21: Navigation to Projects Module

2. In the tool bar, click **T**.

The **Filters** dialog box is displayed.

FILTERS	Clear Filter 🎝
Save Applied Filter	
	✓ ×
Select Filter	
Business Uni	_0 ✿ ଫ 匝
	Apply Filter

Figure 22: Filters Dialog Box

- 3. In the **Select Filter** section, select the appropriate filter. Available options are filters defined for the page.
- 4. Click  $\sqrt[-]{}$  to edit the name of the filter.
- 5. In the text box, rename the filter, and then click  $\checkmark$ .

# 4.3.5.2. Replacing a Filter

## Prerequisites

At least one saved filter exists.

## Overview

You can replace the search criteria of a filter with different search criteria. The following procedure describes the steps to replace existing filter criteria with new filter criteria.

The **Projects** list page is used here as an example.

# Steps

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

The **PROJECTS** list page is displayed.

	PROJECTS	PR	OJECTS			
Q, I	ype to Search 🗙 🗙 🔨	Ð	New 📲 Workflow 🛪 📳 Reports 🛪 🗞	Manage Users 🛛 🛱 Mai	rk Offline/Online 💮 N	lore 🔻
	Select Project 👻	0	Project Code	Project Name	Project Description	Business Unit
15	A Recent Projects		Ţ	T	T	T
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
<b>(</b> 2)	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
				· · · · ·		

Figure 23: Navigation to Projects module

2. Enter the search criteria in the filter text box in the appropriate columns.

3. In the tool bar, click  $\mathbf{T}$ .

The **Filters** dialog box is displayed.

FILTERS	Clear Filter 籽
Save Applied Filter	
	✓ ×
Select Filter	
Business Uni	_0 ☆ ☆ 匝
	Apply Filter

Figure 24: Filter Dialog Box

- 4. In the **Select Filter** section, select the appropriate filter. Available options are filters defined for the page.
- 5. Click  $^{\textcircled{1}}$  . The filter criteria of the selected filter is replaced with the new criteria defined.

# 4.4. Viewing the Form Audit Log

## Overview

The Audit Log feature records information of operations performed in a module in the application.

- Field information inserted on creation of a record
- Field information deleted on deletion of a record
- Field information updated, inclusive of the following:
  - Field information inserted to a record of a form
  - Field information updated in a record of a form
  - Field information deleted in a record of a form
- User name of the user who performed the action
- Date and time the action was performed

You can also filter the log to view only specific information.

Additionally, you can download the audit log information to an Excel workbook.

## Steps

1. In the project navigation pane, click the required form to open it.

2. To view the audit log of all records, in the tool bar, click Audit Log.

PROJECTS		
🔒 New 函 Workflow 🗸 🗐 Reports 🗸 🗞	Manage Users 🎼 Mark Offline/Online 💮 More 👻	
Project Code	Project Name Project Descriptic	Project Status
Ĩ		
SIT - CA ERFO FS LSPDR 2023-1(10)	SIT - Black Mountain R ERFO spot repairs	Design
SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands	Construction
SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Vestern Federal Lands	Construction
SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Vestern Federal Lands	Construction
SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands	Construction



Alternatively, to view the audit log of a specific record, select the record, and then click **Audit Log**. The **Audit Log** page is displayed.

AUDIT LOG					
🕞 Back 🧔 Rep	ort Status				
Duration *:	By Date	•			
From Date *:	06/24/2024	iii	To Date <sup>*</sup> :	07/01/2024	iii
Action *:	All items checked	▼	Action By *:	All items checked	•
Form Fields *;	Select Fields	Ø •		Generate Report	

Figure 26: Audit log Details Page

Note: If Audit Log is not available, click More, and then click Audit Log.

3. Optionally, to filter audit log information, use any of the following filters:

Filter Option	Description
Duration	<ul> <li>Select the duration to be specified to filter audit log information based on specified time periods. Based on the option selected, perform the following steps:</li> <li>If the selected option is <b>By Date</b>, then perform the following steps:</li> </ul>
	<ul> <li>a. Corresponding to From Date, click<sup>to</sup>, and select the date from which the audit log information must be displayed.</li> <li>b. Corresponding to To Date, click<sup>to</sup>, and select the date until which the audit log information must be displayed.</li> </ul>
	• If the selected option is By Month, then perform the following steps:
	a. From the <b>Month</b> drop-down box, select the month for which the audit log information must be displayed.

Filter Option	Description
	b. From the <b>Year</b> drop-down box, select the year for which the audit log information must be displayed.
	<ul> <li>If the selected option is <b>By Quarter</b> then perform the following steps:</li> </ul>
	<ul> <li>a. From the Quarter drop-down box, select the quarter for which the audit log information must be displayed.</li> <li>b. From the Year drop-down box, select the year for which the audit log information must be displayed.</li> </ul>
Action	<ul> <li>Select any of the following options:</li> <li>Select <b>Delete</b> to view details of fields that were deleted.</li> <li>Select <b>Insert</b> to view details of fields that were inserted.</li> <li>Select <b>Update</b> to view details of fields that were updated.</li> </ul>
Action By	Select users who performed the selected actions. Available user names are of users who have created, modified, or deleted a record of the form.
Form Fields	Select the fields on which an action was performed.

4. Click **Generate Report**. Alternatively, to download the audit log information to an Excel workbook, click **Excel Export**.

AUDIT LOG									
🔂 Back 🛛 🏟 Report Status									
	Duration *: By Quarter	<b>•</b>							
	Quarter *: April-June	•	Year *:	2024	•				
	Action *: All items checked	•	Action By *:	7 items checked	•				
Fo	rm Fields *: Projects; Project Co	ode; 🕉 🗸		Generate Repor	rt Excel Ex	port			
Parent Key	Record Identifier	Table Name	Field Name Action	Old Value	New Value	Action By	Action On		
	<b>T</b>	T			T				
21919	SIT MT NPS GLAC 14(4) & MT NPS	PROJECTProj	Total Obligat Update	20628622.05	19222943.56	Rachel Rosen	06/26/2024 2:		
21878	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Total Contrac Update	:	2763873.3300	Rachel Rosen	06/26/2024 2:		
21886	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Start of Cont Update	03/07/2024	04/01/2024	Kim Pellegrini	06/21/2024 9:		
21886	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Revised Cont Update	09/19/2024	10/14/2024	Kim Pellegrini	06/21/2024 9:		
21886	SIT - CA ERFO F5 LSPDR 2023-1(1)	PROJECTProj	Current Cont Update	:	2,763,873.33	Kim Pellegrini	06/21/2024 9:		
21886	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Start of Cont Update	12/05/2023	03/07/2024	Kim Pellegrini	06/21/2024 8:		
21886	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Revised Cont Update	06/21/2024	09/19/2024	Kim Pellegrini	06/21/2024 8:		
21886	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Estimated Co Update	06/21/2024	09/18/2024	Kim Pellegrini	06/21/2024 8:		
21886	SIT - CA ERFO FS LSPDR 2023-1(1)	PROJECTProj	Start of Cont Update	10/01/2023	12/05/2023	Kim Pellegrini	06/21/2024 8: 🛡		
	2 3 4 🕨 🕨 Page siz	e: 50 👻					169 items in 4 pages		

Figure 27: Audit Log Results

# 4.5. Mail Merge

The **Mail Merge** feature enables you to attach mail merge documents to a specific record of a form, download mail merge documents from a specific record of a form, and send email notifications with specific form information as an email attachment to specific recipients.

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 in the **Library** module 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.

Additionally, you can download the mail merge document from the records of the associated form.

The functional flow for mail merge is as follows:

- 4.5.1. Attach mail merge documents to a form
- 4.5.2. Download mail merge documents from a form
- 4.5.3. Send mail merge documents to recipients

# 4.5.1. Attaching Mail Merge Documents to a Record of a Form

# Prerequisites

- Mail merge is configured for the selected form.
- The logged-in user is invited to the project and provided with the Edit permission.

# Overview

You can attach a mail merge document to a specific record of a form.

# Steps

1. On the appropriate list page of a form, select a record for which the notification has to be attached.

2. Click Mail Merge, and then click Merge and Attach.

PRC	PROJECT FUND LIST							
_0	۲	■ M- **- #-	· 🗗 · 🗇 ·	Gelected X				
	Ŷ	Project Fund ID	Image and Attach     Source Code     Fund Source Type     Fund Description	T				
		PFL-8	Merge and Download     Merge and Email     B     CON					
		PFL-7	GPLCON CON 23 CON					
		PFL-6	CON06 CON					

Figure 28: Merge and Attach

## The Merge And Attach dialog box is displayed.

Merge And Attach		×
Mail Merge Configuration *:	~	
Convert to PDF :		
Attach	Cancel	

Figure 29: Merge and Attach Dialog Box

- 3. From the **Mail Merge Configuration** drop-down list, select the appropriate configuration. Available options are the configurations associated with the form.
- 4. To convert the mail merge document to PDF, select the **Convert to PDF** check box. If the check box is cleared, then the mail merge document is attached in Word format.

**Note**: If the **Convert to PDF** check box is selected at the time when the mail merge is configured, then this check box is selected. Clear the check box to attach the mail merge document in PDF format.

5. Click **Attach**. The mail merge document is attached to the record and available in the **Attachments** section of the record.

# 4.5.2. Downloading Mail Merge Documents from a Record of a Form

## Prerequisites

- Mail merge is configured for the selected form.
- The logged-in user is invited to the project and assigned with the View permission.

## Overview

You can download a mail merge document from a specific record of a form.

## Steps

- 1. On the appropriate list page of a form, select a record from which the document must be downloaded.
- 2. Click Mail Merge, and then click Merge and Download.

PROJECT FUND LIST									
_0	•	∎ Br	* <u>°</u> *-	<b>×</b>	<b></b>				1 Selected X
	Û F	Project Fund	ID	T	Merge and Attach	Source Code	Fund Source Type	Fund Description	Ţ
	F	PFL-8		:	Merge and Email	8	CON		
	F	PFL-7			GELCON CONT	23	CON		
	F	PFL-6			CON06 CON0	06	CON		

Figure 30: Merge and Download

# The Merge And Download dialog box is displayed.

Merge And Download		×
Mail Merge Configuration *:	~	
Convert to PDF :		
Download Cancel		

Figure 31: Merge and Download Dialog Box

- 3. From the **Mail Merge Configuration** drop-down list, select the appropriate configuration. Available options are the configurations associated with the form.
- 4. To convert the mail merge document to PDF, select the Convert to PDF check box. If the check box is cleared, then the mail merge document is downloaded in Word format.
   Note: If the Convert to PDF check box is selected at the time when the mail merge is configured, then this check box is selected. Clear the check box to download the mail merge document in PDF format.
- 5. Click **Download**. The mail merge document is downloaded to the local hard drive.

# 4.5.3. Sending Email to Recipients

## Prerequisites

- Mail merge is configured for the form.
- Mail body templates are available in the Mail Body Templates catalog of the library.
- The logged-in user is invited to the project and assigned with the View permission.

## Overview

You can send email notifications after configuring Mail Merge feature for the form. The mail merge document is sent as an attachment.

## Steps

- 1. On the appropriate list page, select the records the details of which must be sent to recipients.
- 2. Click Mail Merge, and then click Merge and Email.

PROJECT FUND LIST												
_0	۲	Ē	₽₩	•°°.≁	<b>!</b> ~	0 -						1 Selected X
	0	Projec	t Fund	ID		Þ	Merge and Attach		Source Code	Fund Source Type	Fund Description	
					T	(F)	Merge and Download	d	<b>T</b>	T		
		PFL-8			:	6	Merge and Email	]	8	CON		
		PFL-7				OFLO	JN C		23	CON		
		PFL-6				CONC	16 C	ONO	6	CON		

Figure 32: Merge and Email

The Merge And Email dialog box is displayed.

Merge And Email	×
Recipient(s) *:	
Mail Merge Configuration *: 🗸 🗸 🗸	
Mail Body Template *: 🗸 🗸 🗸	
Convert to PDF :	
Send Cancel	

Figure 33: Merge and Email Dialog Box

- 3. In the Recipient(s) field, perform the following steps to select email recipients:
  - a. Click to select the required recipients.

The **Recipients** dialog box is displayed.

Recipie	Recipients							
0 selecte	d of total 342							
	Name <b>T</b>	Email ID <b>T</b>	Туре					
	Heidi Hirsbrunner	Heidi_Designer@aurigo.com	User 🔺					
	Heidi Hirsbrunner	Heidi_DesignComponentLead@aurigo.com	User					
	Heidi Hirsbrunner	Heidi_LeadDesigner@aurigo.com	User					
	Heidi Hirsbrunner	Heidi_DesignQAQC@aurigo.com	User					
	Heidi Hirsbrunner	Heidi HighwayDesignManager@aurigo.com	User					
	Heidi Hirsbrunner	Heidi_ProjectManager@aurigo.com	User					
	Heidi Hirsbrunner	Heidi_AEDesigner@aurigo.com	User					
	Heidi Hirsbrunner	Heidi_AELeadDesigner@aurigo.com	User					
	Heidi Hirsbrunner	Heidi_AEManager@aurigo.com	User					
	Heidi Hirsbrunner	Heidi PayltemTeam@aurigo.com	User					
	Beale Spencer	Beale_Administrator@aurigo.com	User					
	Beale Spencer	Beale_Designer@aurigo.com	User					
	Beale Spencer	Beale_DesignComponentLead@aurigo.com	User					
	Beale Spencer	Beale_LeadDesigner@aurigo.com	User					
M	<b>4 2 ▶ ▶</b> 40 ▼ items		41 - 80 of 342 items 🚺					
		Select Cancel						

Figure	34:	Recipients	Dialog	Box
i igui u	04.	nooipiointo	Diatog	DOA

The dialog box lists all the active users of the application.

- b. Select the appropriate recipients, and then click **Select**. Alternatively, you can enter the email addresses of the recipients. You can enter multiple email addresses separated by a semicolon (;).
- c. From the **Mail Merge Configuration** drop-down list, select the appropriate configuration.
- d. The available options are the mail merge configurations associated with the form.
- e. From the **Mail Body Template** drop-down list, select the appropriate template. Available options are mail body templates defined in the **Mail Body Templates** catalog of the library.
- f. To send the mail merge document in PDF format, select the **Convert to PDF** check box to convert the mail merge document to PDF. If the check box is cleared, then the mail merge document is sent in Word format.

**Note**: If the **Convert to PDF** check box is selected at the time mail merge is configured, then this check box is selected by default. Clear the check box if conversion of the mail merge document to PDF is not required.

4. Click Send.

The email with the mail merge document as attachment is sent to the selected recipients. If multiple records are selected, then separate emails for each record is sent to the recipients.

# 4.6. Standard Form Functions

Viewing, editing, deleting information in forms, and generating reports from all forms are similar in procedure throughout the application.

All tasks that you can perform are based on the roles assigned to you in a project and the permissions granted to the roles.

The following form-related tasks are common in the procedure for all forms in the application:

- 4.6.1. Viewing Form Details
- 4.6.2. Editing Form Details
- 4.6.3. Using the Excel Import and Export Feature
- 4.6.4. Deleting a Form Record
- 5. Bookmarking Frequently Used Pages

# 4.6.1. Viewing Form Details

You can view form details based on the workflow stage of the selected record, and the roles assigned to you in the project. It may not be possible to view records in a particular stage depending on the workflow definition of the form.

You can view form details in two ways:

- 4.6.1.1. Information of a single form record in the application
- 4.6.3.3. Information of all form records in a Microsoft Excel workbook

## 4.6.1.1. Viewing Information of a Single Record

#### Prerequisites

- Required permissions to view information
- Permissions to view information in a particular workflow stage

## Steps

1. In the project navigation pane, click a form.

The list page of the selected form is displayed.

	PROJECTS	PROJECT	FUND LIST						
Q, 1	ype to Search 🗙 🗙 🔨	₽ New	🏚 Workflow 👻 📋	Reports 👻 👫 Excel Ex	kport 🔹 💮 More 🕶			T	
	SIT - CA ERFO FS LSPDR 2023- 🔻	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Accou	
1æ	General Quick Access		T		T				
Can D			PFL-4	CON04	CON04	CON	CLIN00101: ERFO	15B60	
لالالا	L Deserverte		PFL-3	CON03	CON03	CON	Option X	84651	
<b>(</b> 8)	+ Documents		PFL-2	CON02	CON02	CON	CLIN00101: ERFO	15B60	
	Document Search		PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO	15B60	
	<ul> <li>Project Report Gallery</li> </ul>								
	<ul> <li>Project Calendar</li> </ul>								
	<ul> <li>Fund Management</li> </ul>								
	Project Fund List								
	Project Fund Transaction								
	Funding Rules								
	+ Bid Estimate Information								
	+ Bidding								
	+ Contracts								
>								•	
1									

Figure 35: List Page

- 2. Select the required record from the list page.
- 3. Click View.

PROJECT FUND LIST											
_0	۲										
	0	Project Fund ID		Fund Source Name	Fund Source Code	Fund Source Type	Fund Description				
			T			T					
		PFL-4		CON04	CON04	CON	CLIN00101: ERFO				
		PFL-3		CON03	CON03	CON	Option X				
		PFL-2		CON02	CON02	CON	CLIN00101: ERFO				
		PFL-1		CON01	CON01	CON	CLIN00101: Non-ERFO				

Figure 36: List Page
#### Federal Highway Administration

### The details page of the form is displayed.

PROJECT FUND LIST	
_Ø Edit 🏽 Cancel 🕅 Workflow	• <b>+ +</b>
Project Fund ID :	PFL:4
Fund Source Name *:	CON04
Fund Source Code :	CON04
Fund Source Type :	CON
Fund Source Category :	ERFO
Default Fund Rule Name *:	100% CON04 - ERFO
Fund Description :	CLIN00101: ERFO
Account Number :	15B6062301103.A40.CN.15F1.06. 1606000000
Account Priority :	I
Authorized Amount (\$) :	0.00
Original Authorized Amount (\$) :	0.00
Expended Amount (\$) :	0.00
Probable Expenditure (\$) :	0.00
Remaining Amount (\$) :	0.00

Figure 37: View the Record

You can view form details based on the workflow stage of the selected record, and the roles assigned to you.

4. Click **Cancel** to return to the list page.

### 4.6.2. Editing Form Details

### Prerequisites

- Required permissions to edit form information
- Workflow stage allows edits to information
- Permissions to edit information in a particular workflow stage

### Overview

You can modify form details based on the workflow stage of the selected form. It may not be possible to edit records in a particular workflow stage depending on the workflow definition of the form. Form information is editable based on the roles assigned to the user.

You can also update form details in bulk.

### Steps

1. In the navigation pane, click a form.

The selected form list page is displayed.

	PROJECTS	PROJECT	FUND LIST					
٩, -	ype to Search 🗙 🗙 🔨	D New	🕅 Workflow 👻 📋	Reports 👻 👫 Excel Ex	(port 🔹 💮 More 👻			T
	SIT - CA ERFO FS LSPDR 2023- 💌	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Accou
<b>I</b> ≩	General Quick Access		Ţ	<b>T</b>	T	T	<b>T</b>	
C III			PFL-4	CON04	CON04	CON	CLIN00101: ERFO	15B60
	L Deservente		PFL-3	CON03	CON03	CON	Option X	84651
( <u>a</u> )-	+ Documents		PFL-2	CON02	CON02	CON	CLIN00101: ERFO	15B60
	= Document Search		PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO	15B60
	<ul> <li>Project Report Gallery</li> </ul>							
	Project Calendar							
	— Fund Management							
	Project Fund List							
	Project Fund Transaction							
	Funding Rules							
	+ Bid Estimate Information							
	+ Bidding							
	+ Contracts							
5								•
							Pag	a 1 of 1

Figure 38: List Page

- 2. Select the required record from the list page.
- 3. Click Edit.

PROJECT FUND LIST									
_0	۲								
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description			
			Ţ		T				
		PFL-4	CON04	CON04	CON	CLIN00101: ERFO			
		PFL-3	CON03	CON03	CON	Option X			
		PFL-2	CON02	CON02	CON	CLIN00101: ERFO			
		PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO			

Figure 39: Edit

4. Make changes required.

PROJECT FUND LIST		_
Save & Exit Save & Continue	🙁 Cancel 🛛 🕅 Workflow 👻 🍟 Select Action	IS 🛨 🔺 🕈
Project Fund ID	PFL-4	î
Fund Source Name	CON04	
Fund Source Code	CON04	
Fund Source Type	CON	
Fund Source Category	ERFO ¥	
Default Fund Rule Name	100% CON04 - ERFO	
Fund Description	CLIN00101: ERFO	
	7.	
Account Number	15B6062301103.A40.CN.15F1.06.1	
Account Priority	Select 🗸	
Authorized Amount (\$)	0.00	
Original Authorized Amount (\$)	0.00	
Expended Amount (\$)	0.00	
Probable Expenditure (\$)	0.00	
Remaining Amount (\$)	0.00	
4		

#### Figure 40: Edit the Record

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.

### 4.6.3. Importing Form Details from an Excel Workbook

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

### 4.6.3.1. Create multiple records simultaneously

You can create multiple form records by importing form information from a Microsoft Excel workbook to the form.

### 4.6.3.2. Update details of multiple records simultaneously

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.

### 4.6.3.1. Uploading Form Details in Bulk

### Steps

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

	PROJECTS	LABOR/E	LABOR/EQUIPMENT					
0	Type to Search 🗙 🗙 🔨	Dew	🞝 New 🖹 Reports 👻 🛱 Excel Import / Export 👻 💬 More 👻					
	SIT - CA ERFO FS LSPDR 2023-	0	Labor/Equipment	Type/Classification	Supplemental Description	Move-In Date		
뒅	General Quick Access			<b>T</b>	T	MM/dd/yyy 📅 🍸		
en 🛙			Equipment	Pickup Truck	Supervisor	04/30/2024		
	<ul> <li>Contracts</li> </ul>		Equipment	Haul Truck		04/30/2024		
<b>\$</b>	<ul> <li>— SIT - CA ERFO FS LSPD</li> </ul>		Equipment	Haul Truck		04/30/2024		
	+ Documents + Configurations		Equipment	Haul Truck		04/30/2024		
			Equipment	Excavator 300G		04/30/2024		
	<ul> <li>Contract Items</li> </ul>		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		
	Labor/Equipment		Labor	Operator	3	04/30/2024		
	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 41: List Page

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

LABOR/EQUIPMEN	т						
🞝 New 🗎 R	eports 👻 🕅	₽t Excel Import / Export →		💮 More 🔹			
D Q Labor.	/Equipment	Excel Import Excel Export (xis)		nental Description	Move-In Date		
No records to displ	lay. E	Excel Export (xlsx) Excel Template (xlsx) Excel Template (xlsx) Excel Template With Dar Excel Template With Dar	ta (xis) ta (xisx)				

Figure 42: 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.

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



Figure 43: 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 44: 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				×
$\leftrightarrow \rightarrow$	$\checkmark \uparrow \qquad \checkmark \qquad $	~ C	Search Downloads	Q,
Organize 🔹	New folder		≡	- 🔳 😗
> 🗖 v	Name		Date modified	Туре
	⊻ loday			
*	Labor_Equipment_Template		7/1/2024 7:57 PM	Microso
↓ *	✓ Last week			
🛄 De				
	File name: Labor_Equipment_Template	`	<ul> <li>All files</li> </ul>	V
	Upload fi	rom mobile	e Open	Cancel

Figure 45: 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 46: Upload the Excel

On successful import, the success message is displayed.

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



Figure 47: Error Log Option

The error log workbook is downloaded to your local storage.

2. 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.

3. 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.

4. 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.

### 4.6.3.2. Updating Form Details in Bulk

### Steps

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

	PROJECTS	LABOR/EQUIPMENT						
0	Type to Search 🗙 🗙 🔨	Dew	🞝 New 🔋 Reports 👻 💱 Excel Import / Export 👻 💬 More 👻					
	SIT - CA ERFO FS LSPDR 2023-	0	Labor/Equipment	Type/Classification	Supplemental Description	Move-In Date		
<b>I</b> ⊒	General Quick Access				T	MM/dd/yyy 🖶 🍸		
rnP			Equipment	Pickup Truck	Supervisor	04/30/2024		
	<ul> <li>Contracts</li> </ul>		Equipment	Haul Truck		04/30/2024		
Ø	<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	04/30/2024		
	Work Activity Te		Labor	Labor	2	04/30/2024		
	+ Billings & Payments		Labor	Operator	1	04/30/2024		
	<ul> <li>Contract Modificati</li> </ul>							
>	Submittals		1 2 🕨 🕅					

Figure 48: List Page

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

LABOR/EQUIPMENT	
🞝 New 📔 Reports 🔻	Bit Excel Import / Export ▼ 💮 More ▼
Labor/Equipmen	Excel Import
No records to display.	Excel Export (xlsx)
	ነ Excel Template (xls) Excel Template (xlsx)
	Excel Template With Data (xls)

Figure 49: 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 50: 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 51: 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 52: 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.

### 4.6.3.3 Downloading Information of Multiple Records

### Prerequisites

- Required permissions to view information
- Permissions to view information in a particular workflow stage

### Steps

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

	PROJECTS	PROJECT FUND LIST							
Q,	Type to Search 🗙 🗙 🔨	D Nev	v 🖻 Workflow 🗸	- 🗎	Reports 👻 🖹 Excel Ex	xport 🔹 💮 More 🕶			T
	SIT - CA ERFO FS LSPDR 2023- 💌	0	Project Fund ID		Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Accou
朣	General Quick Access			Ţ	Ţ		Ţ		
en 8			PFL-4		CON04	CON04	CON	CLIN00101: ERFO	15B60
	A SHI - CA EKPO PS ESPOR 2025		PFL-3		CON03	CON03	CON	Option X	84651
\$	+ Documents		PFL-2		CON02	CON02	CON	CLIN00101: ERFO	15B60
	Document Search		PFL-1		CON01	CON01	CON	CLIN00101: Non-ERFO	15B60
	<ul> <li>Project Report Gallery</li> </ul>								
	<ul> <li>Project Calendar</li> </ul>								
	<ul> <li>Fund Management</li> </ul>								
	Project Fund List								
	Project Fund Transaction								
	Funding Rules								
	+ Bid Estimate Information								
	+ Bidding								
	+ Contracts								
									Þ
1			1 🕨 🍯					Page	e 1 of 1

#### Figure 53: List Page

b. In the tool bar, click **Excel Import/Export**.

PR	ОЈЕСТ Р	UND LIST			
Ð	New	隆 Workflow 👻 📳	Reports 👻	F‡t Excel Export ▼ 💬 More ▼	
	0	Project Fund ID	Fund Sourc	De D	Fund Source Type
		Ţ		Excel Export (xisx)	T
		PFL-4	CON04		CON
		PFL-3	CON03	CON03	CON
		PFL-2	CON02	CON02	CON
		PFL-1	CON01	CON01	CON

Figure 54: Excel Export

c. Click **Excel Export (xls)** or **Excel Export (xlsx)** to export the form details to an Excel workbook. The Excel workbook is downloaded to the local storage.

### 4.6.4. Deleting a Form Record

### Prerequisites

- Required permissions to delete records
- Workflow stage allows record deletion

### Overview

You can delete records in a list page based on the workflow stage of the selected record. It may not be possible to delete records in a particular workflow stage based on the workflow definition of the form. Records can be deleted based on the roles assigned to the user. For example, it is not possible to delete a Contract Change Order record if the workflow stage of the record is set to Approved.

### Steps

1. In the navigation pane, click a form.

	PROJECTS	PROJECT F	FUND LIST					
٩	Type to Search	D New	🕅 Workflow 👻 📋	Reports 👻 🕅 Excel Ex	(port 🔹 💮 More 🕶			Т
	SIT - CA ERFO FS LSPDR 2023- 💌	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Accou
朣	General Quick Access			Ţ	T	Ţ	T	
e m 🗉			PFL-4	CON04	CON04	CON	CLIN00101: ERFO	15B60
	SHIP CALERFO PS LSPDR 2025		PFL-3	CON03	CON03	CON	Option X	84651
\$	+ Documents		PFL-2	CON02	CON02	CON	CLIN00101: ERFO	15B60
	Document Search		PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO	15B60
	<ul> <li>Project Report Gallery</li> </ul>							
	<ul> <li>Project Calendar</li> </ul>							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	Project Fund Transaction							
	Funding Rules							
	+ Bid Estimate Information							
	+ Bidding							
	+ Contracts							
>								•
							Page	e1 of 1

#### The list page of the selected form is displayed.

Figure 55: List Page

- 2. Select the appropriate records from the list page.
- 3. Click Delete.

PRO	JECT F	UND LIST				
_0	Ô	直 剧~ 🐨 🗐				1 Selected X
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
		Ţ	T	T	<b>T</b>	
		PFL-4	CON04	CON04	CON	CLIN00101: ERFO
		PFL-3	CON03	CON03	CON	Option X
		PFL-2	CON02	CON02	CON	CLIN00101: ERFO
		PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO

Figure 56: Delete Option

4. The delete confirmation message is displayed.



Figure 57: Confirmation message

5. Click OK.

# 4.7. 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:

- 4.7.1. Attaching a File to a Form
- 4.7.2. Attaching a File to a Workflow
- 4.7.3. Accessing and Downloading Attached Files
- 4.7.4. Deleting Attached Files
- You can annotate and delete attachments.

### 4.7.1. 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 Act	ions 🔻		++
	ACCOUNT NUMBER .	13100430272	201.340.011.17.00.0	+. 1				
	Account Priority :	CON03-CON0	)4	~				
Auth	norized Amount (\$) :		0.	00				
Exp	pended Amount (\$) :		0.	00				
Proba	ble Expenditure (\$) :		0.	00				
Ren	naining Amount (\$) :		0.	00				ſ
	Notes :							
ATTACHMENTS								
± ≥ ±	-							
File View	Status Docume	nt Na Url	/Link Title	Uploa	ided By	Uploaded Date	File Size	
No Attachment	s available	240						
Link Docume	nt Upload Docume	nt						
1 6								

Figure 58: Using Upload Document Option

$\rightarrow$ $\sim$ 1	• • •	FHWA > Publishe V C Search	Published PDF	۶
rganize • Ne	ew folder		≣• □	(
A Home		Name	Date modified	
		A01_Library_Management_PG_ditamap-10001	5/24/2023 3:08 PM	
	- 11	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	, I -	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 name	→ All files		

The **Open** dialog box is displayed.

Figure 59: Open Dialog Box

- 2. 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.

$\rightarrow \sim \uparrow$	≪ FHWA > Publishe ∨ C Search	Published PDF
rganize - New fold	ler	≣• □ (
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 n	ame: V All files	

Figure 60: 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.

PROJECT FUND L	IST.											
Save & Exit	Save	e & Continue	e 🛞	Cancel	₩o	rkflow 👻	* <b>£</b> * S	elect Ac	tions 👻		1	
	ALLOUIN		• 12	01004302720	01.040.CP	N.V/UU.U4.						
	Accoun	t Priority	: co	DN03-CON04	4	~						
Aut	horized Aı	mount (\$)	:			0.00						
Ex	pended Ai	mount (\$)	:			0.00						
Proba	ble Expen	diture (\$)	:			0.00						
Rer	maining Ai	mount (\$)	:			0.00						
		Notes	:									
						<b>1</b>						
TACHMENTS	5											
Ì 🗹 土												
🔲 🛛 File View	v Status	Document	Nam	e Uri/Li	ink	Title		l	Jploaded By	Uploaded Date	File Size	
		Fund Mana FHWA.docx	gemen	it in		Document	- FM	<i>,</i> , 1	/like Ross	07-27-2023 3:05 AM	13 KB	
Link Docume	ent Up	load Docu	ment									
												-

#### Figure 61: 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 L	IST						
Save & Exit	Save & Continue	( Cancel	┣Ì Workt	low 👻 🧯	Select Ac	tions 🔻	
	ACCOUNT NUMBER .	13100430272	201.340.011.1	/00.04.1			
	Account Priority :	CON03-CON0	04	~			
Aut	norized Amount (\$) :			0.00			
Exp	pended Amount (\$) :			0.00			
Proba	ble Expenditure (\$) :			0.00			
Ren	naining Amount (\$) :			0.00			
	Notes :			<b>A</b>			
TTACHMENTS							
ñ 🗹 🕹	-4						
File View	Status Docume	nt Na Url	/Link Tit	ie Uplo	aded Bv	Uploaded Date	File Size
No Attachmont	r available						
No Accornient							
Link Docume	nt Upload Docume	ent					
-							

Figure 62: Using Link Document Option

The Link Document dialog box is displayed.

ink Document			>
MasterWorks Document	O Upload and Link New Document (	External Document	
Folder : Rn-FHW	A-2607, RESTORATION OF NORTHERN RAILS	~	
	Search	Clear Search	
Document Name	Title	Created By	Created Date
No Link available			
No Link available			
	ov		
	OK Ca	incel	



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 F	RAILS 🗸	
	OK Cancel		

Figure 64: 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.

0	MasterWorks Document O Up	load and Link New Document	O External Document	
	Folder : Rn-FHWA-2607, R	ESTORATION OF NORTHERN RA	ulls 🗸	
)	Document Name	Sea	Clear Search Created By	Created Date
1	Fund Management in FHWA.docx	Document - FM	Mike Ross	07-27-2023 3:17 AM

Figure 65: 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 Docume	nt O Extern	al Document	
Folder : SIT - CA	HBP CR104(1) ET AL, SIT - TRINITY	COUNTY HBP BRID	GES 🗸	
Document Name	Title		Created By	Created Date
No Link available				
	ОК	Cancel		

Figure 66: 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.

PROJECT FUND LI	IST											
Save & Exit	Save & Conti	nue	Cance	R	Workflow	•	* <u>°</u> * s	elect Actions	•			<b>* *</b>
	Account Priori	ty :	CON03-CO	N04		v						-
Auth	horized Amount (	<b>S)</b> :				0.00						
Exp	pended Amount (	<b>s)</b> :				0.00						
Proba	ble Expenditure (	\$) :				0.00						
Ren	naining Amount (	\$) :				0.00						
	Note	es :				<b>A</b>						
ATTACHMENTS						14						
Ū 🗹 土												
File View	Status Do	cumer	nt Name	Uri	/Link		Ті	tle		Uploaded By	Uploaded Date	File Size
	Fur FH\	nd Man WA.doo	agement in x	RES NO RAI	TORATION C RTHERN LS/Documen	DF 1ts	D	ocument - FM	le	Mike Ross	07-27-2023 3:25 AM	12 <b>.77</b> KB
Link Docume	nt Upload Do	ocume	nt									
4												Þ

Figure 67: 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 👻	🐮 Select Actions 👻	<b>+ +</b>
Account Number .	1310045027201.340.CIN.V700.04.1		
Account Priority :	CON03-CON04		
Authorized Amount (\$) :	0.00		
Expended Amount (\$) :	0.00		
Probable Expenditure (\$) :	0.00		
Remaining Amount (\$) :	0.00		1
Notes :			
ATTACHMENTS			
i 🗹 土			
File View Status Docume	nt Na Url/Link Title L	Iploaded By Uploaded Date	File Size
No Attachments available			
Link Document Uplo <u>ad Docum</u>	ent		
4			Þ

#### Figure 68: 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-FHW	A-2607, RESTORATION OF NORTHERN	RAILS ~	
	S	earch Clear Search	
Document Name	Title	Created By	Created Date
No Link available			
	ОК	Cancel	

Figure 69: Link Document Dialog Box

2. Click Upload and Link New Document.

Link Document		×
O MasterWorks Document	Opload and Link New Document	O External Document
Folder : Rn-FHV	NA-2607, RESTORATION OF NORTHER	N RAILS 🗸
1	OK Cancel	

Figure 70: 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.

	ice		
-			
Title	:	EHWA_Restoration of Northern Ra	
New Document	;		Select file
Template Document	;	Used as Template Document for Mail Merge)	
Workflow		None	

Figure 71: New Document Page

- 6. 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** drop-down 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:

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

1. In the Attachments section, click Link Document.

PROJECT FUND L	IST								
Save & Exit	Save & Contin	nue 🛞 Can	cel 🗗 W	/orkflow 🔻	• <u>°</u> •	Select Acti	ons 🔻		<b>+ +</b>
		. IJI0043	027201.340.0	LIN.V / UU.U4.	1				
	Account Priorit	у: солоз-с	CON04		~				
Autl	norized Amount (S	5) :		0.00	)				
Exp	pended Amount (S	5) :		0.0					
Proba	ble Expenditure (S	5) :		0.00	)				
Ren	naining Amount (S	5) :		0.0	)				1
	Note	s:		4	<b>`</b>				_
ATTACHMENTS									_
🖻 🗹 土									
File View	Status Doc	ument Na	Url/Link	Title	Upload	ed By	Uploaded Date	File Size	
No Attachment	s available								
Link Docume	nt Upload Do	cument							
		cament							
4 6									

Figure 72: Using Link Document Option

2. Click External Document.

Link Document		×
O MasterWorks Document	O Upload and Link New Document	External Document
Url/Link: htt	ps://	
Title :		
	OK Cancel	

Figure 73: 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**.
- 6. The file is linked to the form and is displayed in the **Attachments** section.

### 4.7.2. Attaching a File to a Workflow

### Overview

You can upload files to the specific records of a form while performing a workflow action. The **Project Fund List** form is used for illustration purposes.

### Steps

1. In the list page of a form, select the appropriate record.

PROJECTS	PROJECT	FUND LIST							
, Type to Search 🗙 🗙 🔨	🧳 Edil	🐵 View 🗎 Delete	& Warklow ∗	ᣥ	Select Actions •	Re	eports 👻 🛃 Mail Merge 👻 💮 More 🔹	6	1 Soleated
SIT TRINITY COUNTY HEP BRIDGES	0	Project Fund ID	Fund Source Name		Fund Source Code		Account Number Account Priority	Workflow Stat	us
General Quick Atoms		T		T		T	T	T	Т
		PFL-2	CON02		CON02		15A6060010401-540.C CON02-CON01	Published	
+ Documents = Document Search = Project Report Collery = Project Calendar		PFL-1	COND1		CON01		1586060010401-540.C.,,	Published	
— Fund Management									
E Project kund Linesaction									

Figure 74: Using Select Actions Option

2. Click **Select Actions** and then click the appropriate workflow action. The Masterworks dialog box is displayed.

	Notes :				11		
Set Days To Complete for N	lext Stage :		•				
ACHMENTS							
í.	22			-			4.c
File View Status	Document Name	Title	Uploaded By	Uploaded Date	File Size	GPS Latitude	GPS Longitude
o Attachments available							

Figure 75: Masterworks Dialog Box

3. In the Attachments section, click Upload Document.

$\rightarrow \sim \uparrow$	• 🚞 «	FHWA > Publishe	V C	Search P	Published PDF	P
)rganize • Ne	w folder				≡ • □	6
	in ioidei	Name	^		Date modified	
1 I nome		A01_Library_Manageme	ent_PG_ditamap-	10001	5/24/2023 3:08 PM	
	- 11	A01_Library_Managem	ent_PG_ditamap-	10002	5/25/2023 5:23 PM	
Desktop	*	A01_Library_Manageme	ent_PG_ditamap-	10002	5/25/2023 5:23 PM	
Documents	, I -	A01_Library_Managem	ent_PG_ditamap-	10004	5/30/2023 11:04 AN	1
	*	A01_Library_Managem	ent_PG_Draft		5/29/2023 10:06 PN	1
Pictures	*	Adding_an_Engineers_E	stimate_Item_dita	a-1000	6/21/2023 12:29 AN	4
Music	*	Adding_an_Engineers_E	stimate_Item_dit	aAddin	6/15/2023 1:03 PM	
Videos	*	-	_	_		
	File name:	[		All files		

The **Open** dialog box is displayed.

Figure 76: Open Dialog Box

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

5. Click Open.

$\rightarrow$ $\checkmark$ $\uparrow$		FHWA > Publishe V C Search I	Published PDF
ganize - New	folder		≣• □ (
A Home	1	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 🦪	e -	A01_Library_Management_PG_ditamap-10002	5/25/2023 5:23 PM
E Documents	- 1	A01_Library_Management_PG_ditamap-10004	5/30/2023 11:04 AM
🛓 Downloads 🤞	P	A01_Library_Management_PG_Draft	5/29/2023 10:06 PM
🔀 Pictures 🛛 🖌	P	Adding_an_Engineers_Estimate_Item_dita-1000	6/21/2023 12:29 AM
🕑 Music 🛛 🦼	P	Adding_an_Engineers_Estimate_Item_ditaAddin	6/15/2023 1:03 PM
Videos 刘	•		
Fi	ile name:	<ul> <li>All files</li> </ul>	

Figure 77: Using Open Option

The name of the file is automatically updated in the **Document Name** column.

6. Optionally, in the **Title** column, enter the title for the attached file.

u in 19370 in 1957	Notes :	Approved		_			
Set Days To Complete for	Next Stage :	2		0			
ACHMENTS							
i							
File View Status	Document	t Name	Title		Uploaded By	Uploaded Date	File Size
3	FHWA n	otes.docx	Project Fund Document	1	John	12/11/2023 4:58 AM	32 KB
Jelead Decument							
Upload Document							

Figure 78: Updating Title for the Attached File

7. Click **OK**. You can access the attached file from the Workflow Status and History dialog box. For more information, refer to <u>Section 6.2</u>. Viewing the Workflow History.

### 4.7.3. 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.

	PROJECTS			UND LIST				
Q,	🔍 Type to Search 🗙 🗙 🔨			🕅 Workflow 👻 📋	Reports 👻 📴 Excel Ex	sport 🔹 💮 More 🔹		
	SIT - CA ERFO FS LSPDR 2023-1(1 💌		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
1ā	General Quick Access			T	T	T	T	T
nn®				PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	3 1 511 - CA ERFO FS ESPDR 2023-1(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
	<ul> <li>Project Report Gallery</li> </ul>							
	Project Calendar							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	Project Fund Transaction							
	Funding Rules							

Figure 79: Project Fund List Page

The form list page is displayed.

2. Click More, and then click Attachments.

PRO	PROJECT FUND LIST									
Ð,	New	胫 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						
		PFL-2	CON02	CON02	CON					
		PFL-1	CON01	CON01	CON					

Figure 80: Using Attachments Option

The attachments of all the records are listed.

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

Figure 81: List of Attachments

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

PRO	PROJECT FUND LIST									
_0	Edit	📀 View 🛛 🕅 Delete	🖗 Workflow 👻 🗐	Reports 👻 🙋 Mail M	erge 🔻	💮 More 🔻				
	9	Project Fund ID	Fund Source Name	Fund Source Code	Fund So	Attachment	s Description			
		PFL-2	CON02	CON02	CON					
		PFL-1	CON01	CON01	CON	T	590			

Figure 82: 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	PRO	DJECT F	UND LIST				
🔍 Type to Search 🛛 🗙 🗙 🔨			New	🕅 Workflow 👻 📋	Reports 👻 🗄 Excel Ex	port 🔹 💮 More 👻		
١	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>T</b>	<b>T</b>			
e m 🗄				PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	SIT - CA ERFO FS ESPER 2023-1(T)			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-EREO
	Project Report Gallery							
	Project Calendar							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	<ul> <li>Project Fund Transaction</li> </ul>							
	= Funding Rules							

Figure 83: 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 Fur	nd ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description			
			T	T	T	T				
	0	PFL-4	:	CON04	CON04	CON				

Figure 84: Using View Option

### The form details page is displayed.

PROJECT FUND LIST							
_🖉 Edit 🛞 Cancel 🕅 V	Workflow 👻						
Project Fu	und ID : PFL-3						
Fund Source	Name *: CON03						
Fund Source	e Code : CON03						
Fund Source	eType : CON						
Fund Source Cat	tegory : FLAP						
Fund Descr	iption :		<b>A</b>				
Account Nu	umber : 1516043027 1604000000	7201.540.CN.V7 0.25255	700.04.				
Account Pr	riority : CON03-CON	N04					
Authorized Amou	unt (\$) :		0.00				
Expended Amou	unt (\$) :		0.00				
Probable Expenditu	ure (\$) :		0.00				
Remaining Amou	unt (\$) :		0.00				
	Notes :						
ATTACHMENTS			¥i.				
<b>≤</b> ,*,							
File View Status	Document Name	Url/Link 1	Title	Uploaded By	Uploaded Date	File Size	
Ready	Fund Management in	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 85: Project Fund List Page in View Mode

3. In the **Attachments** section, select the appropriate files, and then click  $\stackrel{\bullet}{\clubsuit}$ .

PROJECT FUND LIST								
_🖉 Edit 🏽 🛞 Cancel 🕸 🕅	Workflow 👻					4	+ +	
Account P	riority : CON03-CON	)4					•	
Authorized Amo	unt (\$) :		0.00					
Expended Amo	unt (\$) :		0.00					
Probable Expendit	ure (\$) :		0.00					
Remaining Amo	unt (\$) :		0.00					
	Notes :		<b>A</b>					
ATTACHMENTS	L		71.					
e 🛨							L I	
File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size	Í I	
💽 💿 Ready	<u>Fund Management in</u> 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		
4							•	

Figure 86: Using Download Option

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

	PROJECTS	PROJE	CT FUND LIST				
0	Type to Search 🗙 🗙 🔨	D Ne	w 🕅 Workflow 👻 📋	Reports 👻 🛱 Excel E	kport 🔹 😁 More 🔹		
	SIT - CA ERFO FS LSPDR 2023-1(1 💌		Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
1.5	General Quick Access				<b></b>	<b>T</b>	۲
nnB			PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	511 - CA ERFO FS ESPOR 2023-1(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	_					
	<ul> <li>Project Calendar</li> </ul>						
	<ul> <li>Fund Management</li> </ul>						
	Project Fund List						
	Project Fund Transaction						
	Funding Rules						

Figure 87: Project Fund List Page

The form list page is displayed.

2. In the list page, select the appropriate record.

#### Federal Highway Administration

3. In the **Workflow** group, click **History**.

PRO	PROJECT FUND LIST								
_Ô	Edit	💿 View 🔟 Delete	🕅 Workflow 👻 🌋 S	Select Actions 👻 📳 I	Reports 👻 🧧 Mail Mer	ge 🔹 💮 More 🔹			
	0	Project Fund ID	History	and Source Code	Fund Source Type	Fund Description			
	9	PFL-4	worknow Oser(s)	DN04	CON				

Figure 88: Using History Option

Workflow Status & H	Workflow Status & History								
Workflow Status			Hide 🔨						
Selected	Status Cur	rent Status							
<ul> <li>Published</li> <li>Approve</li> </ul>	Published     Approve								
Workflow History									
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 89: Workflow Status & History Dialog Box

4. To view all the attachments and complete workflow history, click More Details.

Workflow Status & H	istory		×							
Workflow Status			Hide 🔨							
Selected	Selected 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 90: Using More Details Option

### The **History** page is displayed.

HIS	TORY							
۲	Close							
Recor	rd Identifier : PFL-4/CON04							
Wo	rkflow Status							Hide 🔨
	Selected Status	Current Status						
• Di	raft	🔀 Published		Approved	Inactive		• End Stage	
PL	ıblish 🔶	Approve	•					
Wa	rkflow History							Hide 🔨
		Action Pending	Action Completed	Action Failed 📕 Workflow	Completed			
0	Status	Received On	Action	Action Notes	Action On		Action By	
	T	t o t	T	T		<b>ē</b> 6 T		
								î
	Draft	07-26-2023 7:34 AM	Publish		07-26-2023 7	7:34 AM	User10	

Figure 91: History Page

5. In the **Attachments** section, select the appropriate documents, and then click  $\overset{1}{\frown}$  .

HIST	ORY							
🛞 с	lose							
	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@0	1
	Approved	07-27-2023 5:32 AM						Ţ
∢ ∈				)				•
			Show We	orkflow History Re	port			
ATTA	ACHMENTS							
ø	Ł							
	File View Status	Document Name	Url/Link	Title	Uploaded I	By Uploaded	Date	File Size
		Fund Management in FHWA.docx	NA		Mike Ross	07-27-202	3 5:32 AM	12.77KB

Figure 92: Using Download Option

### 4.7.4. 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.

PROJECT	s		PR	OJECT	FUND LIST			
Yupe to Search	×	~ ^	Ð	New	₩ Workflow ▼	🗐 Reports 👻 🛐	Excel Export 🔹 💮	More 💌
SIT - TRINITY COUNTY I	HBP BRIDGES	•		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type
General Quick Access		GES			PFL-2	CON02	CON02	CON
+ Documents	+ Documents				PFL-1	CON01	CON01	CON
Document Search	Document Search							
Project Report G	iallery							
<ul> <li>Project Calendar</li> </ul>	ſ							
<ul> <li>Fund Manageme</li> </ul>	ent							

Figure 93: Project Fund List Page

The form list page is displayed.

b. Click More, and then click Attachments.

PRC	PROJECT FUND LIST											
Ð,	New	🕅 Workflow 👻 📋	Reports 👻 🖓 Excel Ex	xport 👻	💮 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 94: 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			T			MM/dd/ 📅 🗿 🍸			
	PFL-2 / CON02	Project_Fund_List_Att achments_FHWA	1		Angela	PDF	7574.29 KB	12/14/2023 6:32 AM			

Figure 95: List of Attachments

Various document management features are available for attachments.

AT	ATTACHMENTS										
Ū											
Ŀ	2	File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size			
6		Ready	Project Fund List Attac hments FHWA	NA	Project_Fund_List_	Angela	12/14/2023 6:32 AM	7574.29KB			
L	.ink	Document Uploa	d Document	2							

Figure 96: Using Delete Option

# 5. Favorites Utility

You can create shortcuts to access a form rather than having to navigate through menus and forms. The Favorites utility is used to bookmark any form for quick and easy access to these forms from anywhere in the application.

## 5.1. Managing Bookmarks

You can manage the following activities:

- 5.2. Add a bookmark category
- 5.3. Access a bookmark
- 5.4. Edit a bookmark name
- 5.5. Delete a bookmark
- 5.6. Delete a bookmark category

# 5.2. Bookmarking a Form

### Overview

You can bookmark forms for easy and quick accessibility.

### Steps

1. In the navigation pane, click the appropriate form. The form is displayed in the right pane.

0	Losother elimiteration aderci Highway aministration				Ho	me > Fund Management > Globa	Fund List	AT \$	
	HOME	GLOB	JBAL FUND LIST						
Q,	Type to Search 🗙 🗙 🔨	₽ N	ew 🕅 Workflow 👻 🗎	Reports 👻 🖓 Excel In	nport / Export 👻 💮 M	lore 🔻		Ť	
諭	Notifications (16)		Fund Source ID	Fund Source Name	Fund Source Code	Fund Type	Is Active	Created Date	
1ā	Enterprise Search		T	T	T	T		MM/dd/yyy 🔠 🍸	
nnii.	Document Search		GFL-37	GFLCON	CON123	CON	~	06/16/2024	
	Tund Management		GFL-36	CON16	CON16	CON		05/30/2024	
142	= Global Fund List		GFL-35	C105	CI05	сі	~	10/10/2023	
	<ul> <li>Report Gallery</li> </ul>		GFL-34	C104	CI04	CI		10/10/2023	
	<ul> <li>Ad-hoc Reports</li> </ul>		GFL-33	C103	C103	сі	<b>~</b>	10/10/2023	
	<ul> <li>Ad-Hoc Unit Price Search Result</li> </ul>		GFL-32	CI02	CI02	сі		10/10/2023	
	Ad-Hoc Unit Price Search		GFL-31	CI01	CI01	CI	~	10/09/2023	
	Recent Projects		GFL-30	CONO2	CONO2	CON		08/18/2023	
			GFL-29	CON1	CON1	CON		08/18/2023	
			GFL-28	CON003	CON003	CON		08/18/2023	
			GFL-27	CON	CON	CON		08/18/2023	
			GFL-26	CEA01	CEA01	CEA		06/15/2023	
			GFL-25	CE05	CE05	CE		06/15/2023	
								Þ	
>			1 1 2 🕨 🕨					Page 1 of 2	

Figure 97: Navigating to Favorites

### 2. Click Favorites.

The following image displays a sample form to add a bookmark.

0	a Sovetnet a basoutor eGeral Highway kaministration				Hor	me > Fund Manag	ement > Global Fund List	56 (TA
	HOME GLOBAL FUND LIST							
0,	Type to Search 🗙 🗙 🔨	D New	🕅 Workflow 👻 🗎	Reports 👻 🔤 Excel Ir	mport / Export 👻 💮 M	lore 👻	ADD TO FAVORITES	T
â	Notifications (16)	0	Fund Source ID	Fund Source Name	Fund Source Code	Fund Type	,0	
La.	Enterprise Search		T	T	<b>T</b>		Title	; 🔽
Inc	Document Search		GFL-37	GFLCON	CON123	CON	Global Fund List	
	Eund Management		GFL-36	CON16	CON16	CON	🔲 New Folder Folder	
100	<ul> <li>Global Fund List</li> </ul>		GFL-35	C105	C105	CI	Unsorted	~
	<ul> <li>Report Gallery</li> </ul>		GFL-34	CI04	C104	сі	Add Cancel	
	<ul> <li>Ad-hoc Reports</li> </ul>		GFL+33	C103	C103	СІ		_



- 3. In the **Title** box, enter the name of the link to be displayed in the **Favorites** tab.
- 4. Optionally, to categorize bookmarks, perform either of the following steps:
- To create a folder, select the New Folder check box, and in the Folder box, enter the name of the folder.
- From the Folder drop-down list, select the folder in which the link must be available.
- 5. Click Add to bookmark the page.

The page is bookmarked and is available in the bookmarks list.

# 5.3. Accessing a Bookmarked Form

### Overview

Bookmarked forms are available in the Favorites tab in the navigation pane of the application.

### Steps

1. Click Favorites.

The **FAVORITE LIST** section displays all the bookmarks to forms.

0	a dearait diaeadain e dearait Highway caministration				Hor	ne > Fund Manag	ement > Global Fund List	P 🕫	TA
	HOME	GLOBAL F	GLOBAL FUND LIST					FAVORITE LIST	
9	Type to Search 🛛 🗙 🗙	🞝 New	户 Workflow - 首	Reports 👻 🔤 🖓 Excel In	nport / Export 👻 💮 M	ore 🖛	O Transferration		T
諭	Notilications (16)	0	Fund Source ID	Fund Source Name	Fund Source Code	Fund Type	Y Type to Search	×	
14	Enterprise Search		<b>T</b>	<b>1</b>	T		<ul> <li>Global Fund List</li> </ul>	7 6	T
THE COLOR	Document Search		GFL•37	GFLCON	CON123	CON	Manage Favor	ites	
	Tund Management		GFL-36	CON16	CON16	CON	ADD TO FAVOR	ITES	
<b>(2)</b>	Global Fund List		GFL-35	CI05	CI05	сі		10/10/2023	
	= Report Gallony		GFL-34	CI04	CI04	сі		10/10/2023	
	= Report Gallery		GFL-33	C103	C103	ci		10/10/2023	



2. In the **Favorite List** section, click the appropriate bookmark. Alternatively, perform either of the following steps:
- Click a folder, and then click the appropriate bookmark.
- In the **Type to Search** box, enter the name of the bookmark, and then click the bookmark. The form is opened on the right pane.

# 5.4. Editing a Bookmark Name or Folder Name

## Steps

1. Click Favorites 🏂 , and then click Manage Favorites.



Figure 100: Manage Favorites

The Favorite Management page is displayed.



Figure 101: Favorite Management

2. Select the appropriate category, and then click Edit.



Figure 102: Edit the Favorite

The bookmarks in the category are displayed.

FAVORITE MANAGEMENT		
📄 Save & Exit 🚺 Save & Continue	(ancel	
Category Name *:	Unsorted	
FAVORITE-LINKS		
Link litle		Link URL
Link little Global Fund List		Link URL /Common/BrixListPage.aspx?xContext=FNDMGMT&PID=0&ParentID=0&nt=1
Link Title Global Fund List		Link URL /Common/BrixListPage.aspx?xContext=FNDMGMT&PID=0&ParentID=0&nt=1
Link Title Global Fund List		Link URL /Common/BrixListPage.aspx?xContext=FNDMGMT&PID=0&ParentID=0&nt=1

Figure 103: Favorite Management - Edit

- 3. To change the category name, in the **Category Name** box, modify the category name.
- 4. To modify the bookmark name, perform the following steps:
  - a. In the **Favorite-Links** section, click the appropriate bookmark, and then click **Edit**. The **Edit Favorite-Links** dialog box is displayed.

Edit Favorite-Links		×
Link Title *:	Global Fund List	
Link URL *:	/Common/BrixListPage.aspx?	
	xContext=FNDMGMT&PID=0&ParentID	
	=0&nt=1	
	Save Cancel	

Figure 104: Edit Favorite Links

- b. In the Link Title box, enter the name of the bookmark.
- c. Click Save.
- 5. Click Save.

# 5.5. Deleting a Bookmark

#### Steps

1. Click Favorites 🏂 , and then click Manage Favorites.



Figure 105: Manage Favorites

#### The Favorite Management page is displayed.

FAVORITE MANAGEMENT	
Et Excel Export → ↔ More →	T
Category Name	
Unsorted Unsorted	
	Page 1 of 1
	Page 1 of 1

Figure 106: Favorite Management

2. Select the appropriate category, and then click **Edit**. The bookmarks in the category are displayed.



Figure 107: Edit the Favorite

3. In the **Favorite-Links** section, click the appropriate bookmark, and then click **Delete**.

FAVORITE MANAGEMENT	
🗈 Save & Exit 🛛 Save & Continue 🛞 Cancel	
Category Name *: Unsorted	
FAVORITE-LINKS	
Link Title	Link URL
Global Fund List	/Common/BrixListPage.aspx?xContext=FNDMGMT&PID=0&ParentID=0&nt=1



A confirmation message is displayed.

- 4. Click OK.
- 5. Click Save.

# 5.6. Deleting a Bookmark Category

## Steps

1. Click Favorites 🏂 , and then click Manage Favorites.



Figure 109: Manage Favorites

## The Favorite Management page is displayed.

FAVORITE MANAGEMENT	
Et Excel Export - 💮 More -	T
Category Name	
	T
Unsorted	
	Page 1 of 1

Figure 110: Favorite Management

2. Select the appropriate category, and then click **Delete**.

FA۱	FAVORITE MANAGEMENT								
_0	Edit 💿 View	🔟 Delete	🖹 Reports 👻			1 Selected X	T		
~	Category Name								
							T		
	Unsorted						:		

Figure 111: Delete Favorite Folder

A confirmation message is displayed.

- 3. Click OK.
- 4. Click Save.

The category and the bookmarks in the category are deleted.

# 6. Workflow Status Transitions

A workflow automates a business process for stakeholders to evaluate a form, make decisions, and then take an appropriate action. Workflows comprise various status, and each status is transitioned to the next workflow status through actions taken by stakeholders of the current workflow status. Transitioning a workflow status to the subsequent workflow status is performed in the way of a workflow action.

The following topics describe the various workflow related tasks:

- 6.1. Performing Workflow Status Transitions
- 6.2. Viewing the Workflow History
- 6.3. Selecting Workflow Users
- 6.4. Associating a Workflow

# 6.1. Performing a Workflow Action

#### Prerequisites

- A workflow is associated with the record.
- You are an action stakeholder for a particular status in the workflow.
- You are invited to the project.
- You have editing permission for the form or document.
- A workflow action is pending for you.

#### **Overview**

When a workflow action is performed on a record, the record is moved from the current workflow status to the subsequent workflow status. A workflow status is transitioned to the subsequent workflow status based on the workflow action conditions defined .

#### Steps

1. Open a form list page or document list page.

**Note**: You can view the workflow status of a record in the **Workflow Status** column of the list page.

2. Perform any of the following steps, as applicable:

• Select the appropriate record.

PR	ОЈЕСТ Р	UND LIST							
_0	🖋 Edit 🐵 View 🔟 Delete 🔊 Workflow 🛪 🦹 Select Actions 🛪 📓 Reports 🛪 👰 Mail Merge 🛪 💬 More 🛪								
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status
		T	<b>T</b>		T		T		Ţ
		PFL-4	CON04	CON04	CON	15F0A 14(4) Funding	15A7302501404 R40.C		Approved
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved
		PFL 2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02 CON04	Approved

Figure 112: Selecting a Record

• Select multiple records that are in the same workflow status and have the same workflow associated with them.

PRI	Delete	UND LIST	⊙ More ▼							
	0	Project Fund ID	Arrachments	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status	
			30 medemicines	<b>T</b>		T	Y			
		PFL 4	CON04	CON04	CON	15F0A 14(4) Funding	15A7302601404 R40.C		Approved	
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved	
		PFL 2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02 CON04	Approved	
		PFL-1	CON01	CON01	CON	FLTP Funding MT NPS GLAC 14(	1517302601404 540.C	CON01-CON02-CON04	Approved	

Figure 113: Selecting Multiple Records with the same Workflow Status

• Select the appropriate record, and then click **Edit**.

PR	OJECT F	UND LIST								
j	Edit	👁 View 👖 Delete	🕼 Workflow 👻 💕	Select Actions 🔻 📳	Reports 🔻 📴 Mall Me	rge 🔹 💮 More 💌				
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status	
		T	T		T	T	T	T		1
		PFL-4	CON04	CON04	CON	15F0A 14(4) Funding	15A7302601404 R40.C		Approved	
		PFL-3	CDN03	CONDB	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved	
		PFL-2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 11	1517302601404 540.C	CON02-CON04	Approved 📈	

Figure 114: Editing a Record

## The Project Fund List page is displayed.

PROJECT FUND LIST	
🙁 Cancel 📳 Workflow 👻 🔮	Select Actions 🔻
Project Fund ID	: PFL-4
Fund Source Name	*: CON04
Fund Source Code	: CON04
Fund Source Type	: CON
Fund Source Category	: GAOA
Fund Description	: 15F0A 14(4) Funding
Account Number	
Account Priority	:
Authorized Amount (\$)	: 0.01
Original Authorized Amount (\$)	: 0.01
Expended Amount (\$)	: 0.00
Probable Expenditure (\$)	: 0.00
Remaining Amount (\$)	: 0.01
Notes	:
	li. 👻



3. Click **Select Actions** \*, and then click the appropriate workflow action.

PR	OJECT P	UND LIST									
Ĵ	Edit	👁 View 📋 🕻	Delete	剧 Workflow •	Select Actions 🔹	1	Reports 👻 📓 Mail Mei	rge 🗸 💮 More 🔹			1.Selected X
	0	Project Fund ID		Fund Source Name	Return to Published		Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status
			T		Mark as Inactive,	۲Ì	T			Ţ	T
		PFL-4		CON04	- Co		CON	15F0A 14(4) Funding	15A7302601404 R40.C		Approved
		PFL-3	:	CON03	CON03		CON	FLAP Funding MT NP5 GLACIER	1517303700141 540.C		Approved
		PFL-2		CON02	CON02		CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02-CON04	Approved

Figure 116: Using Select Actions Option – List Page

PROJECT FUND LIST	
🛞 Cancel 📲 Workflow 👻 🚏	Select Actions 🔻
Project Fun <sup>R</sup> Fund Source N،	eturn to Published Aark as Inactive
Fund Source Code	: CON04
Fund Source Type	: CON
Fund Source Category	: GAOA
Fund Description	: 15F0A 14(4) Funding
Account Number	: 15A7302601404 R40.CN.15F0.30 1730001426 25255
Account Priority	:
Authorized Amount (\$)	: 0.01
Original Authorized Amount (\$)	: 0.01
Expended Amount (\$)	: 0.00
Probable Expenditure (\$)	: 0.00
Remaining Amount (\$)	: 0.01
Notes	:

Figure 117: Using Select Actions Option – Details Page

Available actions are based on the definition of the associated workflow.

The Masterworks dialog box is displayed.

MasterWorks				×
	Notes : Validated th	ne information added for	the fields.	11
Set Days To Complete for Ne	xt Stage : 2		1	
ATTACHMENTS				
Ē				
File View Status	Document Name	Title	Uploaded By	Uploaded Date File Size
No Attachments available				
Upload Document				
			ОК	Cancel

Figure 118: Masterworks Dialog Box

- 4. Optionally, in the **Notes** field, enter the notes for the workflow transition. You can access these notes from the **Workflow History** dialog box.
- 5. In the **Set Days To Complete for Next Stage** field, enter the number of days by when the workflow action of the next workflow status must be completed.
- The number mentioned in this field determines the due date to complete the workflow action for the next workflow status.
- If the field is empty, the application applies the default number of days set for the respective workflow.
- If you want to override the default days set for the respective workflow, you need to enter the appropriate number in this field.

MasterWorks					×
Set Days To Complete for N	Notes : Validated ti	he information added for	r the fields.	4	
ATTACHMENTS					
Ē					
File View Status	Document Name	Title	Uploaded By	Uploaded Date	File Size
No Attachments available					
Upload Document			ок	Cancel	

Figure 119: Set Days To Complete for Next Stage

6. Optionally, in the **Attachments** section, you can upload or link related files. For information on attachments, refer to <u>Section 4.7. Attachments</u>.

You can access these documents from the **Workflow History** dialog box. For more information, refer to <u>Section 6.2. Viewing the Workflow History</u>.

7. Click **OK**.

# 6.2. Viewing the Workflow History

#### Prerequisites

A workflow is associated with the record.

## Overview

You can view the business process progression of a record in the workflow history of the record. The following details are available in the workflow history of every record:

- Action taken at every workflow status
- Date the workflow action was performed
- Notes entered when the workflow action was performed
- User name and user ID of the users who performed a workflow action
- Documents attached during workflow transitions

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

#### Steps

1. In the list page of a form, select the appropriate record.

PR	PROJECT FUND LIST										
_0	🌶 Edit 🐵 View 🔟 Delete 🕅 Workflow 👻 🍄 Select Actions 🔻 🖹 Reports 🛪 🙆 Mail Merge 🛪 💬 More 🛪										
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description					
		Т	Т	T	T	Т					
		PFL-4	CON04	CON04	CON	15F0A 14(4) Funding					
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER					
		PFL-2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14					

Figure 120: Selecting a Record

2. Click **Workflow**, and then click **History**.

_0	Edit	👁 View 🔟 Dele	te 📑 Workflow 🔻 🕇	🕻 Select Actions 👻 📓
	0	Project Fund ID	History	nd Source Code
		PFL-4		IN04
		PFL-3	CON03	CON03

Figure 121: Using History Option

The Workflow Status & History dialog box is displayed.

Workflow Status & History		×						
Workflow Status		Hide 🔺						
Selected Status Current 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 122: Workflow Status & History Dialog Box

The Workflow Status section displays the current and the previous workflow statuses.

The Workflow History section displays the details of the workflow statuses.

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3. To view the complete workflow history, click **More Details**.

in on our our our of an	istory		×
Workflow Status			Hide 🔺
Selected	Status Curi	rent Status	
Published     Approve		Approved	
Workflow History			Hide ^
Workflow History Workflow Status :	Published	Workflow Status :	Approved
Workflow History Workflow Status : Received On :	<b>Published</b> 07-26-2023 7:34:08 AM	Workflow Status : Received On :	Approved 07-27-2023 5:32:06 AM
Workflow History Workflow Status : Received On : Action :	<b>Published</b> 07-26-2023 7:34:08 AM Approve	Workflow Status : Received On : Action :	Approved 07-27-2023 5:32:06 AM
Workflow History Workflow Status : Received On : Action : Action Notes :	<b>Published</b> 07-26-2023 7:34:08 AM Approve	Workflow Status : Received On : Action : Action Notes :	Approved 07-27-2023 5:32:06 AM
Workflow History Workflow Status : Received On : Action : Action Notes : Action By :	Published 07-26-2023 7:34:08 AM Approve Mike Ross	Workflow Status : Received On : Action : Action Notes : Action By :	Approved 07-27-2023 5:32:06 AM
Workflow History Workflow Status : Received On : Action : Action Notes : Action By : Due Date :	Published 07-26-2023 7:34:08 AM Approve Mike Ross 07-26-2023 7:34:08 AM	Workflow Status : Received On : Action : Action Notes : Action By : Due Date :	Approved 07-27-2023 5:32:06 AM 07-27-2023 5:32:06 AM

Figure 123: More Details option

## The **History** page is displayed.

ніято	DRY						
Clo	ose						
cord	Identifier : PFL-4/CON	04					
Work						( <u>(</u>	lide 🔨
10,200	Selected Status	Current Status					
					• inactive	• End Stage	
100	0	Publi	shed	Approved			
Drai		5- 10 W W W W W W W W W W W W W W W W W W	and the second se				
Publ	lish 🔴	Арро	ove				
Publ	lish 🗨	Арри	ove •				
Publ	fligh •	Appro	ove •				lide 🔨
Publ	cflow History	Appro-	ave	ed 📕 Action Failed 🔳 Wor	ktlow Completed		lide ^
Publ	flow History Status	Appro Action Pend Received On	ting Action Complete Action	ed 📕 Action Failed 📗 Wor Action Notes	ktlow Completed Action On	Action By	lide ^
Publ	flow History Status	Approvements Approvements Approvements Action Penders Received On To	Sing Action Complete Action	ed Action Failed Wor Action Notes	kilow Completed Action On 了 茝 〇	Action By	lide ^
Publ	effow History Status	Appro Action Pena Received On Y 證 ③	ting Action Complete Action	ed Action Failed Wor Action Notes	Kilow Completed Action On 首 G	Action By	lide ^

Figure 124: History Page

The **Workflow Status** section displays the progression of the workflow through the various statuses.

The Workflow History section displays the details associated with each of the workflow statuses.

The **Attachments** section displays the list of documents attached when users performed workflow actions on the selected record.

4. To view details associated with any of these workflow statuses, click the appropriate workflow transition record in the **Workflow Status** section.

HISTORY							
() Close							
Record Identifier : PFL-4/CON04							
Workflow Status							Hide ^
Selected Status	Current Status						
Dratt Publish	Published Approve	•	Approved	• Inactive	• End Stage		
4							E F
Workflow History							Hide 🔺
	)	Action Pending Action	on Completed 📕 Action Fa	ailed 📕 Workflow Comple	ted		
🛛 Status R	teceived On	Action	Action Notes	Action On	Action By	Action By User Name	Action Mes
Approved 🛛	<b>e</b> 0 <b>i</b>	T	T	1 0 T	T	🔤 🖬	
Approved 1	1/21/2023 8:37 AM						
( )							•
			Show Workflow History Repo	ort			

Figure 125: Workflow Status Section

The **Workflow History** section displays the details associated with the selected workflow statuses.

The **Attachments** section displays the files uploaded during the workflow transition of the selected workflow statuses.

5. To open an attachment, in the **Attachments** section, in the **Document Name** column, click the required file name.

1	HISTO	RY											
۲	) Clo	ose											
		Draft	07-26-2023 7:34 AM		Publish				07-26-2023	7:34 AM	User10		-
	0	Published	07-26-2023 7:34 AM		Approve				07-27-2023	5:32 AM	Mike@0	01	
		Approved	07-27-2023 5:32 AM										
	4 🖛											Þ	_
					Show Work	cflow History Re	port						
4	ATTA	CHMENTS											
	ø	*											
	~	File View Status	Document Name	Url/Li	ink	Title		Uploaded E	Sy.	Uploaded Dat	e	File Size	е
			Fund Management in FHWA.docx	NA				Mike Ross		07-27-2023 5:3	2 AM	12.77KB	3

Figure 126: Clicking Document Name

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The document is opened in the application viewer.

	VIEWER	
Edit - View - Page - Interactive - Annotations -   I /137 Q 41.3% Q I I I I R Q I Q I I     Pages     Fund MANAGEMENT   IN FEDERAL   HIGHWAY   ADMINISTRATION     Masterworks	🕞 Back 📄 Save 🏫 Print	
Pages     Fund Management   Print     Fund Management   Interference   Print     Fund Management   Interference   Page 1     Fund Management   Interference   Page 2   Interference   Interference <td< th=""><th>Edit - View - Page - Interactive - Annotations -</th><th></th></td<>	Edit - View - Page - Interactive - Annotations -	
Pages          Fund Management         Image: Page	♠ ♦ 1 /137 Q 41.3% ✓ Q E B B B B	
Pages       Fund management       Page       Page       Page       Page       Page       Page         Fund management       In Federal       Highway       Administration	<b>H</b>	
	Pages	UND MANAGEMENT N FEDERAL IGHWAY DMINISTRATION
	Image: Second	

Figure 127: Viewing a Document in the Application Viewer

6. To view the workflow history as a report, click **Show Workflow History Report**.

HIST	ORY								
<b>⊛</b> ⊂	ose								
	Draft	07-26-2023 7:34 AM	Publish			07-26	5-2023 7:34 AM	User10	4
0	Published	07-26-2023 7:34 AM	Approve			07-23	7-2023 5:32 AM	Mike@01	
	Approved	07-27-2023 5:32 AM							
ATTA	ACHMENTS		Show W	orkflow History Re	port				•
	File View Status	Document Name	Url/Link	Title		Uploaded By	Uploaded E	Date I	File Size
		Fund Management in FHWA.docx	NA			Mike Ross	07-27-2023 5	5:32 AM	12.77KB

Figure 128: Using Show Workflow History Report Option

## The Workflow History Report is displayed.

WORKFLOW	V HISTORY	REPORT						
Back	D Subs	cribe						
4 4 1	of 1 🕨			Find   Next		• t	1	
			Workfle	ow Hist	ory Re	port		
Record	Name:	Project Fu	nd List	Record [	Details:	Fund	Source Na	me
Project	Code:	Aurigo SIT GLAC 14(4 GLACIER 1	MT NPS ) & MT NPS 4(1) - RKR	Project N	lame:	Aurig Glacie Road	o - Test Rel er Road & N	nabilitate Many Many Glacier
Status	Pendir Role(s)	ıg On	Received On	Action	Action Name	n User	Action On	Due Date Override
Draft	A/E De Lead Design Manag ions,Ac or,Con Admin Staff,C n Com Lead,D Compo Lead,D oiect M	signer,A/E er,A/E jer,Acquisit dministrat struction onstructio ponent lesign onent lesigner,Pr fanager	12/11/202 3 2:28 AM	Publish	Admir or	nistrat	12/11/20 23 2:28 AM	12/11/2023 2:28 AM

Figure 129: Workflow History Report Page

# 6.3. Selecting Workflow Users

#### Prerequisites

Workflows are published for the form.

#### **Overview**

At any workflow stage, you can select specific users to mandatorily take an action at the defined workflow stage. These selected users must perform an action at the defined workflow stage to move the workflow to the subsequent workflow stage. Only selected workflow users can perform the workflow action.

For document folders in the Document Management module, users selected at a folder level are applicable to all sub-folders and document records within them. Additionally, you can select users at a sub-folder level and at a document record level.

The Project Fund List form is used for illustration purposes.

#### Steps

1. To select users in the workflow of a module or document folder, perform the following steps:

a. In the list page of a form or the list page of a document folder, click **Workflow**, and then click **Workflow User(s)**.



Figure 130: Using Workflow User(s) Option

b. From the **Available Workflows** drop-down list, select a workflow. The published workflows associated with the form are displayed.

Workflow User(s)					
Available Workflows :	Select	•			
Note: '*' indicates the stage has an action	he action to move the workflow		he action to move the workflow to next stage		
	Custom Project Fund List		1		

Figure 131: Published Workflows

The **Workflow User(s)** table is displayed. The list of stakeholders for each stage and role is displayed.

Workflow User(s)						
Available W	orkflow	vs: Custom Project	Fund List 🔹			
		Stage	Role	User Name	First Name	Last Name
		T	T	T	T	Т
✓ Stage: Draft						
~	Role:	Acquisitions				
		Draft	Acquisitions	Rama_Acquisitions	Rama	
		Draft	Acquisitions	Ryanp_Acquisitions	Ryan	Phillips
		Draft	Acquisitions	Shirley_Acquisitions	Shirley	Anderson
		Draft	Acquisitions	Dean_Acquisitions	Dean	Umathum
		Draft	Acquisitions	Antony	Antony	
•	-					
	23	4 5 6 7	8 9 10			Page 1 of 18
Note: '*' indicates the stag	e has an	action which requires every s	elected user to complete the a	action to move the workflow t	o next stage	
			Sav	<i>v</i> e		

Figure 132: List of Stakeholders

- 2. Alternatively, to select users in a workflow for a record of a form or a document, perform the following steps:
- Select a record, click Workflow, and then click Workflow User(s).

PRO	OJECT	FUND LIST					
_0	Edit	💿 View	🔟 Delete	🚯 Workflow 💌	🗐 Reports 🔻 🧯	Mail Merge 💌	💮 More 💌
	0	Project Fur	nd ID	History	ind Source Co	Fund Se	ource Type
		PFL-2			DN02	CON	
		PFL-1	:	CON01	CON01	CON	

Figure 133: Using Workflow User(s) Option

The **Workflow User(s)** page with the associated workflow of the record is displayed.

Workflow User(s)							
Workflow assigned for record : Custom Project Fund List							
		Stage	Role	User Name	First Name	Last Name	
		T		T	T		
✓ Stage	: Inact	tive				î	
~	Role:	Acquisitions					
		Inactive	Acquisitions	Rama_Acquisitions	Rama		
		Inactive	Acquisitions	Ryanp_Acquisitions	Ryan	Phillips	
		Inactive	Acquisitions	Shirley_Acquisitions	Shirley	Anderson	
		Inactive	Acquisitions	Dean_Acquisitions	Dean	Umathum	
		Inactive	Acquisitions	Antony	Antony		
•	-						
	2 3	4 5 🕨 🍽				Page 1 of 5	
Note: '*' indicates the stage has an action which requires every selected user to complete the action to move the workflow to next stage							
			541				

Figure 134: Workflow User(s) Page

Only workflow stages following the current workflow stage are displayed, and the list of stakeholders for each stage is displayed.

#### Federal Highway Administration

3. Select the users for each stage to add to the workflow.

		Stage	Role	User Name	First Name	Last Name
		Approved	Administrator		T	
✓ Stag	e: Appi	roved				
~	Role:	Administrator (Sho	wing 10 of 40 item:	s. Group continues on t	he next page.)	
		Approved	Administrator	Administrator	Administrator	
		Approved	Administrator	shreyash	shreyash	N
		Approved	Administrator	kishor	Kishor	E
		Approved	Administrator	Mahesh	Mahesh	Panda
		Approved	Administrator	Ramadevi	Ramadevi	
		Approved	Administrator	Rama_Administrat	Rama	
		Approved	Administrator	Beale_Administrat	Beale	Spencer
	-					
	2 3	4 5 6 7				Page

Figure 135: Using Filter Option

Optionally, you can filter the users using the following filters:

- o Stage
- o Role
- o User Name
- o First Name
- o Last Name
- 4. Click Save.

Based on the defined workflow, any or all selected users must perform the workflow action on the selected record.

The **Workflow History** page displays the workflow actions performed by all users across all stages of the workflow.

# 6.4. Associating a Workflow

#### Prerequisites

- Workflows are published for the form.
- The logged-in user is assigned Administrator role.

#### Overview

Once a workflow is published as the default workflow for a form, every record of the form that is created in every project is associated with its default workflow. You can change the default workflow of a form. The newly associated workflow is effective for this form only in this project. New records created for this form in this project are associated with the newly selected workflow.

The Project Fund List form is used for illustration purposes.

#### Steps

1. In the navigation pane, click a form to open.



Figure 136: Selecting a Form

2. Click **Workflow**, and then click **Associate**.



Figure 137: Using Associate Option

#### Federal Highway Administration

#### The Workflow Association dialog box is displayed.



Figure 138: Workflow Association Dialog Box

The **Default Workflow** section displays the workflow name of the form that is marked as default for the form in the application.

 To associate a different workflow to the form in the project, from the APPLY A NEW WORKFLOW FOR THIS LISTPAGE AND MODULE drop-down box, select the workflow to associate with the form for the project.



Figure 139: Using Applying a new Workflow for this List Page and Module Option

Available options are the published workflows for the respective form.

Upon selecting the workflow, the **WORKFLOW OVERRIDE FOR THIS PAGE** field displays the current workflow that is associated with the form for the project.

Workflow Association	1		×
DEFAULT WORKFLOW :			
Custom Project Fund Lis	t		
WORKFLOW OVERRIDE	FOR THIS PAGE :		
FHWAProject_WF	Remove		
APPLY A NEW WORKFL	OW FOR THIS LIST	FPAGE AND MO	DULE :
Select	~	Apply	

Figure 140: Updated Workflow Override for this Page Field

If no selection is done in the **APPLY A NEW WORKFLOW FOR THIS LISTPAGE AND MODULE** field, then the **WORKFLOW OVERRIDE FOR THIS PAGE** field displays No Workflow Associated.

 Optionally, to reset the workflow of the form for the project to the default workflow as defined for the form in the application, click **Remove** adjacent to the **WORKFLOW OVERRIDE FOR THIS PAGE** field.

Workflow Association			×
DEFAULT WORKFLOW :			
Custom Project Fund List			
WORKFLOW OVERRIDE FOR T	HIS PAGE :		
FHWAProject_WF	Remove		
APPLY A NEW WORKFLOW FO	R THIS LISTP.	AGE AND M	ODULE :
Select	~	Apply	

Figure 141: Resetting to Default Workflow

5. Click **Apply** to save the changes. The workflow properties are associated with the form. The selected workflow is associated with the newly created records of this form within the project.

# 7. Enterprise and Project Features

# 7.1. Using the Enterprise Search Utility

## Overview

Enterprise Search is a module-based search engine utility to find and view specific information from a large collection of related data. The search results are based on the criteria that are defined for a particular form. Search results contain information of only the projects you are invited to.

## Steps

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

The ENTERPRISE DASHBOARD page is displayed.

	HOME	ENTERPRISE DASHBOARD
Q,	Type to Search 🗙 🗙 🔨	🔤 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 Default 🗊 Delete 🦓 Set As Default
ø	Notifications (16)	Report Viewer 🔺
<b>⊡</b>	Enterprise Search	{ ∢ <u>⊥</u> ar ⊥ > >
	<ul> <li>Document Search</li> </ul>	PROJECTS BY % COMPLETE
<b>@</b>	Fund Management	
-	<ul> <li>Report Gallery</li> </ul>	
	<ul> <li>Ad-hoc Reports</li> </ul>	
	Ad-Hoc Unit Price Search Result	
	Ad-Hoc Unit Price Search	
	Recent Projects	
		PROJECTS BT % COMPLETE
>		

Figure 142: Enterprise Dashboard

2. In the navigation pane, click Enterprise Search.



Figure 143: Enterprise Search

ENTERPRISE SEARCH		
Q Search	C. Export	
SEARCH FORM		Hide 🔺
Form	: Type here to filter Forms	-
SEARCH RESULTS		Show ~

Figure 144: Enterprise Search

- 3. In the **Form** box, click and select the form within which you want to search for data or records. Alternatively, type the name of the form, and then select the appropriate from. Available forms in the list are forms with the **IsSearchable** form attribute set to **True**. All fields available in the form are displayed.
- 4. Enter the criteria to search.
- 5. Optionally, expand the related sections, and enter additional criteria to search.
- 6. Click Search.
- 7. The information that matches the criteria is displayed in the SEARCH RESULTS section. Search results contain information of only the projects you are invited to.

ENTER	PRISE SEARCH					
Q Sea	rch 👁 View 🗳 Reset 🗋	Export				
SEARCI	H FORM					Hide 🔺
	Form :	Global Fund List ×				
	Fund Source ID :					
	Fund Source Name :	CON				
	Fund Source Code :					
	Fund Source Type :	CON 🗸				
	Notes :					
	Is Active :	Yes 🗸 🗸				
SEARCI	HRESULTS					Hide 🔨
0	Fund Source ID	Fund Source Name	Fund Source Code	Fund Type	Is Active	Modified By
		T	1	<b>T</b>		
	GFL-1	CON01	CON01	CON		Kishor E
	GFL-2	CON02	CON02	CON		Kishor E
	GFL-3	CON03	CON03	CON		Kishar E
	GFL-4	CON04	CON04	CON		Kishor E
						Page 1 of 1

Figure 145: Search Results

The following options are available:

- To save the search results to an Excel workbook, in the toolbar, click **Export**.
- To view a record, in the **SEARCH RESULTS** section, perform the following steps:
  - a. Select the appropriate record and then click **View**. A dialog box with the respective record details is displayed.

- b. Click **Open In New Tab** to view the record details in a new tab. Optionally, click **Close** to return to the **SEARCH RESULTS** section.
- To clear existing search results to search with new criteria, click **Reset**.

# 7.2. Searching for Documents at the Enterprise Level

#### Overview

You can search for documents in the application based on specified search criteria. You can search for documents uploaded to various folders across the application and documents uploaded as attachments to forms and workflows.

You can enter any search criteria combination to search for documents. The search results section displays the list of documents from across the application that you are invited to and the roles you are assigned. From the search results, you can view and download documents. You can also export the search results to an Excel workbook.

#### Steps

1. In the module menu, click **Home**. The **ENTERPRISE DASHBOARD** is displayed.



Figure 146: Enterprise Dashboard

#### Federal Highway Administration

2. In the navigation pane, click **Document Search**.



Figure 147: Document Search

## The **SEARCH DOCUMENTS** page is displayed.

SEARCH DOCUMENTS				
🔍 Search 💿 View 💆 Reset	土 Download 🛛 🗋 Export			
DOCUMENTS ATTACHMENTS				
SEARCH DOCUMENTS				Hide 🔨
Default Properties				
Projects	:	Document Folder :	Select	
Document Property	: Select 🗸	Created By :	All Users 🗸 🗸	
Document Title	:	Document Name :		
File View Status	: All 🗸			
SEARCH RESULTS				Show 🗸

Figure 148: Search Documents

3. You can search for documents in the **Documents** folders of projects, or for attachments uploaded in project forms.

Perform either of the following steps:

- To search for documents in the **Documents** folders of projects, in the **SEARCH DOCUMENTS** section, perform the following steps:
  - a. To define basic criteria to search for documents, perform the following steps:
    - i. In the **Document Title** box, enter the title of the document.
    - ii. In the **Document Name** box, enter the name of the document.
    - iii. From the **File View Status** drop down list, select the status of the document.
    - iv. From the **Created By** drop-down list, select the user name of the user who has uploaded the document.

Available user names are of users who have uploaded documents in the application.

- b. To define additional search criteria, perform the following steps:
  - i. From the **Document Property** drop-down list, select the appropriate document property.
  - ii. The **Advanced Properties** section is displayed. The search criteria in the section are based on the **Document Property** selected.
  - iii. In the **Advanced Properties** section, provide the appropriate information. Available fields are based on the document property selected from the **Document Property** drop-down list.
- c. To search for documents from selected projects, in the **Project** field, perform the following steps:
  - i. Click .

The **Projects List** dialog box is displayed.

Projects Lis	Projects List X						
0 selected of	0 selected of total 290						
	Project Name	Project Code	T				
	SIT - Black Mountain Road	SIT - CA ERFO FS LSPDR 2023-1(1)					
	SIT - Black Mountain Road Ryan Maya Denham	SIT - CA ERFO FS LSPDR 2023-1(1) (1)					
	SIT - Black Mountain Road	SIT - CA ERFO FS LSPDR 2023-1(1)(2)					
	SIT - Black Mountain Road	SIT - CA ERFO FS LSPDR 2023-1(1)_Test					
	SIT - CA ERFO FS LSPDR 2023-1(1)1 - RKR 052224	SIT - CA ERFO FS LSPDR 2023-1(1)1 - RKR 052224					
	SIT - Black Mountain Road RD Maya	SIT - CA ERFO FS LSPDR 2023-1(1)2-RD					
	SIT - Black Mountain Road - JT CFL	SIT - CA ERFO FS LSPDR 2023-1(1)3 - JT 5-28-24	l				
	SIT - Black Mountain Road	SIT - CA ERFO FS LSPDR 2023-1(1)9_KKP					
	SIT - Repairs on Wawona Road-5 JT	SIT - CA FTNP YOSE 14(7) 01102024 JT					
	SIT - Repairs on Wawona Road-2 - rkr	SIT - CA FTNP YOSE 14(7)(2) - rr0131					
	SIT - Repairs on Wawona Road 3 RW	SIT - CA FINP YOSE 14(7)(3)					
	SIT - Repairs on Wawona Road-4_KKP	SIT - CA FTNP YOSE 14(7)(4)_KKP					
	Pavement Preservation Bay Area - broken - Incorrect Item Import	SIT CA NPS PP 2021(1)					
	Coeur D Alene River Road and Prichard Creek Road	SIT ID FLAP SHOSHO MULTI(1)					
	SIT- KPEL Letter Project -2	SIT- Letter Project -1					
	KPELL SIT - Letter Project - 6	SIT-Letter Project 6	-				
	1 2 3 4 ▶ ▶ 40 ▼ items		81 - 120 of 290 Items				
	Select Cancel						

Figure 149: Projects List Dialog Box

- ii. Select the appropriate projects, and then click Select.
- d. To search for documents from the folders, in the **Document Folder** box, click and select the appropriate document folders.

Alternatively, type the name of the document folder, and then click the appropriate folder. Available options are folders based on the following criteria:

If no projects are selected in the **Projects** field, then all folders defined in the **Documents** module of all projects are displayed.

- If projects are selected in the **Projects** field, then all folders defined in the **Documents** module of the selected projects are displayed.
- To search for documents uploaded as attachments to forms and workflows, click the **Attachments** tab, and in the **SEARCH ATTACHMENTS** section, perform the following steps:
  - a. To define basic criteria to search for attachments, perform the following steps:
    - i. In the **Document Title** box, enter the title of the document.
    - ii. In the **Document Name** box, enter the name of the document.
    - iii. From the File View Status drop-down list, select the status of the document.
    - iv. From the **Created By** drop-down list, select the user name of the user who has uploaded the document.

Available user names are of users who have uploaded documents in the application.

b. To search for documents from the projects, in the Projects field, perform the following steps:

Note: To search for attachments from an enterprise level form, do not select a project.

- i. Click . The **Projects List** dialog box is displayed.
- ii. Select the appropriate projects, and then click **Select**.
- c. To search for attachments from the forms, in the **Select Form** box, click and select the appropriate forms.

Alternatively, type the name of the form, and then click the appropriate form.

## 4. Click Search.

Based on the search criteria specified, the **SEARCH RESULTS** section displays the list of documents that match the search criteria.

SEARCH D	SEARCH DOCUMENTS							
🔍 Search 👁 View 🚅 Reset 🛃 Download 🗋 Export								
DOCUME	DOCUMENTS ATTACHMENTS							
SEARCH	DOCUMENTS							Hide 🔨
Default	Properties							
	F	Projects :	SIT - Black M	Mountain Road	Docur	ment Folder : Se	ect	
	Document P	roperty :	Select	~		Created By : All	Users	*
	Docume	nt Title :	Contract Do	ocument	Docu	ment Name :		
	File View	/ Status :	All	~				
SEARCH	RESULTS							Hide 🔨
🔲 File	View Status	Document	Name	Document Title	Created By	Project Code	Project Name	Contract Code
			T					
🗖 🖷 R	Ready	DOCx.docx		Contract Document		SIT - CA ERFO FS LSPE	SIT - Black Mountain R	
-								Þ

#### Figure 150: Search Results

- 5. You can perform the following actions:
- To download documents, in the **SEARCH RESULTS** section, select the appropriate documents, and then click **Download**.
- The selected documents are downloaded to your local hard drive.
- To download details of the list of documents available in the **SEARCH RESULTS** section to an Excel workbook, click **Export**.
- The properties of documents in the search results are downloaded as an Excel workbook to your local hard drive.
- To open a document, select a document and then click **View**. The document is opened in the document viewer.
- To open the folder or form where the document is available, in the **SEARCH RESULTS** section, double-click the appropriate document.
- To reset the search criteria, click **Reset**.

# 7.3. Searching for Documents at the Project Level

#### Overview

You can search for documents in the project based on specified search criteria. You can search for documents uploaded to folders in the Documents folder of projects and documents uploaded as attachments to forms and workflows.

You can enter any search criteria combination to search for documents. The search results section displays a list of documents from the project based on the roles assigned to you. From the search results, you can view and download documents. You can also export the search results to an Excel workbook.

#### Steps

In the module menu, click **Projects**.
 The **PROJECTS** list page is displayed.

PROJECTS			PR	OJECTS					
Q Type to Search X X			÷D	🞝 New 📓 Workflow 🛪 🗃 Reports 🛪 🗞 Manage Users 🎼 Mark Offline/Online 💮 More 🛪					
	Select Project	-	0	Project Code	Project Name Project Description Business Unit				
ta.	Recent Projects			Y					
968	SIT - CA ERFO FS LSPDR 2023-1(1) All Projects			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands				
				SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands				
<b>(</b> 2)				SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands				
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands					

Figure 151: Navigation to Projects module

2. In the list page, double-click the appropriate project, and then click the project folder to expand it.



Figure 152: Expanding Projects Folder

3. In the navigation pane, click **Document Search**.



Figure 153: Document Search

The SEARCH DOCUMENT page is displayed.

In the **Projects** field, the name of the associated project is displayed.

4. You can search for documents available in the **Documents** folders of the project or for attachments uploaded in the project forms.

Perform any of the following steps, as applicable:

- To search for documents available in the **Documents** folders of the project, in the **SEARCH DOCUMENTS** section, perform the following steps:
  - a. To define basic criteria to search for documents, perform the following steps:
    - i. In the **Document Title** field, enter the title of the document.
    - ii. In the **Document Name** field, enter the name of the document.
  - iii. From the **File View Status** drop-down list, select the status of the document.
  - iv. From the **Created By** drop-down list, select the user name of the user who has uploaded the document.

Available user names are of users who have uploaded documents in the application.

- b. To define additional search criteria, perform the following steps:
  - i. From the **Document Property** drop-down list, select the appropriate document property.

The **Advanced Properties** section is displayed. The search criteria in the section are based on the **Document Property** selected.

- ii. In the **Advanced Properties** section, provide the appropriate information. Available fields are based on the document property selected from the **Document Property** drop-down list.
- c. To search for documents from the folders, in the **Document Folder** field, click and select the appropriate document folders.

Alternatively, type the name of the document folder, and then click the appropriate folder.

Available options are folders defined in the Documents module of the associated project.

- To search for documents uploaded as attachments to forms and workflows, click the **ATTACHMENTS** tab, and in the **SEARCH ATTACHMENTS** section, perform the following steps:
  - a. To define basic criteria to search for attachments, perform the following steps:
    - i. In the **Document Title** box, enter the title of the document.
    - ii. In the **Document Name** box, enter the name of the document.
    - iii. From the **Created By** drop-down list, select the user name of the user who has uploaded the document.
  - iv. Available user names are of users who have uploaded documents in the application.
  - v. From the **File View Status** drop-down list, select the status of the file.
  - b. To search for attachments from the forms, in the **Select Form** field, click and select the appropriate forms.

Alternatively, type the name of the form, and then click the appropriate form.

5. Click Search.

Based on the search criteria specified, the **SEARCH RESULTS** section displays a list of documents that match the search criteria.

SEARCH DOCUMENTS									
🔍 Search 💿 View 🕻	🤆 Reset 🗜 Downloa	d 🕻 Export							
DOCUMENTS ATTACHMENTS									
SEARCH DOCUMENTS									
Default Properties									
P	Projects : SIT - Black N	Mountain Road	Docur	ment Folder : Select	t				
Document P	roperty : Select	~		Created By : All Use	ers				
Docume	nt Title : Contract Do	ocument	Docu	ment Name :					
File View	<b>Status</b> : All	~							
SEARCH RESULTS	_	_	_	_					
File View Status	Document Name	Document Title	Created By	Project Code	Pro				
T				T					
Ready	DOCx.docx	Contract Document		SIT - CA ERFO FS LSPD	SIT				



You can perform the following actions:

• To download documents, in the **SEARCH RESULTS** section, select the appropriate documents, and then click **Download**.

The selected documents are downloaded to your local storage.

• To export details of the list of documents available in the **SEARCH RESULTS** section to an Excel workbook, click **Export**.

The properties of documents in the search results are downloaded as an Excel workbook to your local storage.

- To open a document, select a document and then click **View**. The document is opened in the document viewer.
- To open the folder or form where the document is available, in the **SEARCH RESULTS** section, double-click the appropriate document.

# 7.4. My Tasks

In Masterworks, the tasks awaiting your action are listed on a page that is similar to a to-do list. For example, if you must approve a **Pay Estimate** record, then this task is listed in **MY TASKS**.

The number of tasks listed is based on the value defined in the **Filter Window Range (in Days)** field in the **Application Settings** page of the **Administration** module.

You can access the **MY TASKS** page from anywhere in the application. For more information on viewing tasks, refer to <u>Section 7.4.1. Viewing My Tasks</u>.

You can also select the window for a specific date range for which you want to view the tasks awaiting your action. The number of windows displayed is based on the value defined in the **No. Of Filter Windows** field in the **Application Settings** page of the **Administration** module. For more information on viewing tasks for a specific date range, refer to <u>Section 7.4.2</u>. Viewing My Tasks within a Date Range.

The tasks awaiting your action are grouped at the module level. Once you have completed a task, the corresponding notification in the **MY TASKS** page is automatically removed from the list.

From the **MY TASKS** page, you can perform the following activities:

- <u>7.4.3. Complete a pending Task</u>
- <u>7.4.4. Customize my tasks notifications</u>

# 7.4.1. Viewing My Tasks

## Overview

The **a** icon feature in Masterworks enables you to access all the tasks awaiting your action from anywhere in the application.

## Steps

1. In Masterworks, click 🌲 .



#### Figure 155: Notifications

## The My Tasks page is displayed.

0	3 Seek weld known kilor Geleral Highway Administration		Home 🗜 🌣	TA
	HOME	ENTERPRISE DASHBOARD	My Tasks	¢ ×
9	Type to Search X X	Select Dashboard: Project Dashboard	Q Search by Project or Form	τŢ
節	Notifications (17)	Report Viewer	You have 1 tasks from last 1 days Last updated at 3:32 F	MC
li	Enterprise Search	1 of t 🕨 🖳 🛅 🛪 🚍	SIT - Black Mountain Road	<b>d</b>
	Document Search	PROJECTS BY % COMPLE	Today	
(a)	Fund Management		Submittel ID: SUB-69824F24C000004-0008	
	Report Gallery		Submitted with Discussion 6:02	AM
	<ul> <li>Ad-hoc Reports</li> </ul>		Submittal • Show Details	
	<ul> <li>Ad-Hoc Unit Price Search Result</li> </ul>			
	<ul> <li>Ad-Hoc Unit Price Search</li> </ul>			
	Recent Projects			
		PROJECTS BY % COMPLE		
<b>&gt;</b>			All Notifications	

Figure 156: My Tasks Page

- 2. In the My Tasks page, click All Notifications at the bottom center of the page.
- 3. The **MY TASKS** list page displays all the tasks that are awaiting your action for all the projects to which you are invited.

	MY TASKS	(®					<b>T</b>			
07/01/2024 - 06/30/20 👻 Customize Notifications 🛞 Close 😁 More 👻										
	Form	Project Code	Project Name	Contract Code	Contract Name	Record Identifier	Assig			
	T		T		Ţ		MM/			
•	▼ Form Name: Submittal									
	Submittal	SIT - CA ERFO FS LSPD	SIT - Black Mountain R	6982AF24C000	SIT - CA ERFO F	Submittal ID: SUB-698	07/0 <sup>,</sup>			
	Page 1 of 1									



**Note**: In the **MY TASKS** list page, the number of tasks listed is based on the value defined in the Application Settings page of the Administration module.

From the **MY TASKS** list page, you can also perform the following functions:

- View tasks within a specific date range.
- Access records with a pending task.

## 7.4.2. Viewing My Tasks within a Date Range

#### **Overview**

You can select a specific date range for which you want to view the tasks awaiting your action. The number of date ranges available is based on the number of filter windows defined in the **Application Settings** page of the **Administration** module.

#### Steps

1. In Masterworks, click I. The **My Tasks** page is displayed.

0	2. Seather (4 lanea blar ederal Highway Administration		Home	🕈 🙀
	HOME	ENTERPRISE DASHBOARD	My Tasks	© ×
9	Type to Search 🗙 🗙 🔨	Image         Select Dashboard:         Project Dashboard         V	Q Search by Project or Form	×Ţ
	Notifications (17)	Report Viewer	Yau have 1 lasks fram last 1 days Last u	pdated at 3:32 PM Ċ
<u>l</u> i≩	Enterprise Search	(	SIT - Black Mountain Road	1 Unread 🔺
	Document Search	PROJECTS BY % COMPLE	Today	
<b>(</b> 2)	Fund Management		Submittal ID: SUB-6982AF24C000004-0008	
	<ul> <li>Report Gallery</li> </ul>		Submitted with Discussion	6:02 AM
	Ad-hoc Reports		Submittal • <u>Show Details</u>	
	<ul> <li>Ad-Hoc Unit Price Search Result</li> </ul>			
	<ul> <li>Ad-Hoc Unit Price Search</li> </ul>			
	Recent Projects			
		PROJECTS BY % COMPLE		
		4	All Notifications	

Figure 158: My Tasks page
2. In the **My Tasks** page, click **All Notifications** at the bottom center of the page.

The **MY TASKS** list page displays all the tasks that are awaiting your action for all the projects to which you are invited.

0	MY TASKS 7/01/2024 - 06/30/20	🖉 Customize Notifica	tions 🛞 Close 💬	More 👻			Ŧ
	Form	Project Code	Project Name	Contract Code	Contract Name	Record Identifier	Assig
Ŧ	Form Name: Submitta	al					
	Submittal	SIT - CA ERFO FS LSPD	SIT - Black Mountain R	6982AF24C000	SIT - CA ERFO F	Submittal ID: SUB-698	07/0 <sup>,</sup>
•							Þ
k	Page 1 of 1						

Figure 159: My Tasks List Page

**Note:** In the **MY TASKS** list page, the number of tasks listed is based on the value defined in the **Application Settings** page of the **Administration** module.

3. To select the date range for which the tasks must be displayed, click the **Select Period** drop-down list, and then select the appropriate date range.



Figure 160: Select Period

Note: Upon clicking the Show Historical Records option, it lists all the tasks awaiting your action.

## 7.4.3. Completing a Pending Task

#### Steps

1. In Masterworks, click 4. The My Tasks page is displayed.

The list of projects awaiting your actions is displayed.

0	L Sawhari I di kawa lala di derati Highway diministration		Home 🛃 🔂 TA
০ গ্রি	HOME Type to Search X X  Notifications (17) Enterprise Search	ENTERPRISE DASHBOARD	My Tasks
œ	Document Search     Fund Management     Report Gallery     Ad hoc Reports     Ad-Hoc Unit Price Search Result     Ad-Hoc Unit Price Search	PROJECTS BY % COMPLE	Submittel ID: SUB-6982AF24C000004-0008       Submittel with Discussion       6:02 AM       Submittel + Sinov Databa
>	Recent Projects	PROJECTS BY % COMPLE	All Notifications

Figure 161: My Tasks

- 2. In the **MY TASKS** page, click and expand the appropriate project. The list of records awaiting your actions is displayed.
- 3. To view additional workflow notes and form details of a record, click **Show Details**.



Figure 162: Show Details

4. To complete the workflow action of a record, corresponding to the appropriate record, click 💌, and then click the action.

The record is opened in the appropriate form's page, and the **Masterworks** dialog box is displayed.

5. Click **OK**.

The workflow status of the record is updated, and the task is removed from the My Tasks page.

## 7.4.4. Customizing My Tasks Notifications

#### Overview

In Masterworks, you can customize the list of projects for which you do not want to receive notifications. You can access the 4 icon from anywhere in the application.

To customize the notifications displayed in the My Tasks page, perform the following steps:

#### Steps

1. In Masterworks, click 🌲 .

The My Tasks page is displayed.

0	Deather i forecaling a deata Highway dministration		Home 📕 😒 🔼
	HOME	ENTERPRISE DASHBOARD	My Tasks 🕸 🗙
9	Type to Search X X	🔤 Select Dashboard: Project Dashboard 🗸 🗸	Search by Project or Form
諭	Notifications (17)	Report Viewer	You have 1 tasks from last 1 days Last updated at 3:32 PM C
朣	Enterprise Search		SIT - Black Mountain Road
	Document Search		Today
<b></b>	Fund Management	PROJECTO BT // COMPLE	
	Report Gallery		Submittal ID: SUB-6982AF24C00004-0008
	<ul> <li>Ad-hoc Reports</li> </ul>		Submitted with Discussion 0002 Air
	Ad-Hoc Unit Price Search Result		Sciencias = Treat Density
	= Ad-Hoc Unit Price Search		
	Recent Projects		
		PROJECTS BY % COMPLE	
>			All Notifications

Figure 163: My Tasks

2. In the **My Tasks** page, click <sup>®</sup>. The **CUSTOMIZE NOTIFICATIONS** page is displayed.

CU	TOMIZE NOTIFICATIONS	-			
Ð	Save 🛞 Close				
PRO	JECTS INCLUDED TO RECEIVE NOTIFICATIONS				
C	Project Name	Project Code			
C	Pioneer Mountians Scenic Byway	MT PFH 73-1(3)			
C	Flk Creek Road	OR PFH 159-1(1)			
C	Willow Creek Road	OR PFH 109-1(4)			
C	Halequin Bridge Detour	WA PRA-NOCA 10(5)			
C	Benham Creek Bridge & FDR 25 North	WA FS ERFO 96-22(8)			
	Flowery Trail Road	WA PFH 158-1(4)			
C	Tillamook Area Roads	OR ERFO 96-30(4)			
	FDR 4712, 4713 Unatilla NF	WA FS ERFO 96-24(1)			
C	Minuteman Missile Base Roads	MT OMAD 18(30)			
C	Umpqua NF North Umpqua Area Roads	OR FS ERFO 97-15(1)			
Image: 6         Image: 6         Image: 6         201 - 240 of 4,19           201 - 240 of 4,19         201 - 240 of 4,19         201 - 240 of 4,19					
	Add Remove				



### Alternatively,

- a. In the **My Tasks** page, click **All Notifications** at the bottom center of the page. The **MY TASKS** list page is displayed.
- b. In the MY TASKS list page, click Customize Notifications.
   The CUSTOMIZE NOTIFICATIONS page displays a list of all projects that are included to receive notifications.
- 3. To remove the projects for which you do not want to receive notifications, select the appropriate projects, click **Remove**, and then click **OK**.

The selected projects are removed from the list of receiving notifications.

- 4. Optionally, to add the removed projects to the list of notifications, perform the following steps:
  - a. Click Add.

The **Removed Project** dialog box is displayed.

Removed Project X			
0 selected of total 1,522 Select All Ro			Select All Records
	Project Name	Project Code	т
	GLR, Norris to Golden Gate, Ph II	WY PRA YELL 10(19)	<b>A</b>
	Middle Fork Snoqualmie River Road	WA PFH 29-1(1)	
	Eagle's Nest Corner at MP 67.5	AK PRA DENA 10(34)	
	Deweyville Trailhead-Neck Lake Rd	AK PFH 43(10)	
	Sol Duc Valley Road, Phase 2	WA PRA OLYM 103(3)	
	Suiattle River Road Emergency Repai	WA FS ERFO 071-2017	
	Jenny Creek Bridge	AK PFH 40(3)	
	Glacier Area Roads Emergency Repair	WA ERFO 07(1)20(14)	
	Atlanta Road	ID PFH 82-1(1)	
	Pavement Preservation Utah	UT NPS PRES 15(1)	
	Yellowstone River Bridge	WY NPS YELL 12(2)	
	Pavement Preservation Colorado	CO NP MULTI PMS(1)	
	Ochoco Ranger Station Road	OR FLAP CROOK 123(1)	
	Oregon Caves Highway (OR 46) Restoration	OR FLAP DOT 46(1)	-
₩ ◀ 5 ►	▶   40 ▼   items		161 - 200 of 1,522 items
	Select Cancel		

Figure 165: Removed Projects Dialog Box

- b. Select the check box adjacent to the appropriate project names, and then click **Select**. The selected projects are added to the list of receiving notifications.
- 5. Click Save.

# 7.5. Viewing Inbox Notifications

#### Overview

Masterworks enables action stakeholders to receive email notifications of specific workflow stage transitions. These email notifications are available in the Inbox of the users who are configured to receive them. The delivery of notifications is configured in the associated workflow.

#### Steps

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

The Enterprise Dashboard is displayed.



Figure 166: Enterprise Dashboard

2. In the navigation pane, expand Notifications, and then click Inbox.



Figure 167: Inbox

**Note**: The number of notifications you have received is displayed adjacent to the **Inbox** label in the navigation pane.

3. To view a notification, select the appropriate notification, and then click View.

View	Delete					1 Selected X
	Form		Project Code	Project Name	Subject	Assigned Date
		T	T			MM/dd 🗰 🗿 📘
Form N	lame: <b>Enterprise</b>					
Ente	erprise Module					
	Enterprise	:			Submittal:SUB-Contract 1	06/18/2024 8:03 AM
	Enterprise				Submittal:SUB-Contract 1	06/18/2024 7:58 AM
	Enterprise				Submittal:SUB-Contract 1	06/18/2024 7:55 AM
	Enterprise				Engineer's Estimate: EE-0	06/17/2024 3:25 AM
	Enterprise				Engineer's Estimate: EE-0	06/12/2024 7:06 AM
	Enterprise				Engineer's Estimate: EE-0	06/12/2024 5:15 AM
						Page 1

Figure 168: View Inbox

4. To delete a notification, select the appropriate notification, and then click **Delete**.

## 7.6. Using the Ad-Hoc Unit Price Search

#### Overview

The **Ad-Hoc Unit Price Search** feature enables you to quickly determine the unit price of any pay item based on historic data. This feature enables consultants and other designers to prepare engineer's estimates for work orders that are not tracked under a project in Masterworks.

#### Steps

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

The ENTERPRISE DASHBOARD page is displayed.



Figure 169: Enterprise Dashboard

#### Federal Highway Administration

2. In the navigation pane, click **Ad-Hoc Unit Price Search**.



Figure 170: Navigation to Ad-hoc Unit Price Search Form

The UNIT PRICE SEARCH page is displayed.

UNIT PRICE SEARCH				
🔍 Search 🗳 Reset 🗋 Export	Co Save Results			
SEARCH CRITERIA				Hide 🛧 🛔
Search in All Projects	O Search In Specific Project			
Contractor	: Select			
Standard Items Table	: FP 14 🗸	Pay Item Description :	<b>^</b>	
Measurement System	: US Customary 🗸		7/	
Pay Item No	:	Unit :		
State	: Select	Density :	Select	
Schedule Construction Type	: Select	Partner Agency :	Select	
Standard Items Table	: Select	Terrain :	Select	1
Schedule Letter	: Select	Supplemental Description :		
Inflation Index	: None 🗸		74	
Bid Status	: Awarded; Not Awarded 🗸 🗸			
Quantity between	: and			
Item Quantity	:			v
4				

Figure 171: Unit Price Search

3. To define the search criteria, provide the appropriate information in the fields, as described in the following table.

Field Name	Description	
Search In All	Click any of the following options, as applicable:	
Projects or Search in Specific Project	<ul> <li>Search In All Projects: To search unit price data in estimates and bids across all the projects in the application.</li> <li>Search in Specific Project: To search unit price data in estimates and bids from a specific project.</li> </ul>	

Field Name	Description
Project Code	<b>Note:</b> This field is displayed only if the <b>Search in Specific Project</b> option is selected.
	From the multi-select drop-down list, select the appropriate FLH project
	numbers.
	Available options are active and inactive projects with data privacy as <b>Public</b>
	to which the user is invited.
	To enable the search activity, it is mandatory to select at least one project.
Contractor	From the multi-select drop-down list, select the appropriate contractors.
	Alternatively, enter the name of the contractor, and then from the list of
	contractors, click the appropriate contractor.
	Available options are active contractors defined in the
	Contractor Details catalog of the library.
	If the field is empty, then Masterworks searches for all bids of all contractors.
Standard Items	By default, the latest standard items table defined in the
Table	<b>Standard Items Table</b> library catalog is displayed. Optionally, from the drop-
	down list, select the appropriate standard items table.
	Available options are standard item tables defined in the
	Standard Items Table catalog of the library.
Measurement	By default, <b>US Customary</b> is displayed.
System	Optionally, from the drop-down list, select the appropriate measurement
	Available options are measurement systems defined in the <b>Measurement</b>
	Systems catalog of the library.
Pay Item No	To select a pay item number, perform the following steps:
	The <b>Pay Item No</b> dialog box is displayed
	Available ontions are standard items defined in the selected standard
	items table that is defined in the <b>Standard Items Table</b> catalog of the
	library.
	2. Select the appropriate pay item.
	Note: Based on the selection of the Pay Item No, the value of the Pay
	Item Description and Unit fields are displayed.

4. To define the filter criteria, provide the appropriate information in the fields, as described in the following table:

Field Name	Description
State	From the multi-select drop-down list, select the appropriate states.
	Available options are active states or territories defined in the
	State/Territory catalog of the library.
Schedule	From the multi-select drop-down list, select the appropriate schedule
<b>Construction Type</b>	construction types. Available options are schedule construction types
	defined in the Schedule Construction Type catalog of the library.

Field Name	Description
Standard Items	From the multi-select drop-down list, select the appropriate standard items
Table	tables. Available options are standard item tables defined in the
	Standard Items Table catalog of the library.
Schedule Letter	From the multi-select drop-down list, select the appropriate schedule
	letters. Available options are letters from A to Z.
Inflation Index	From the drop-down list, select the appropriate inflation index.
	Available options are the construction inflation indices defined in the
	Construction Inflation Indices catalog of the library.
	Based on the selected inflation index, Masterworks automatically calculates
	the inflation percentage (%) that is displayed for the appropriate records in
	the Search Results section.
	Inflation % is calculated as: (Inflation Rate for the latest year – Inflation Rate
	for the year of the Award Date) ÷ Inflation Rate for the year of the Award Date
Bid Status	From the multi-select drop-down list, select the appropriate bid status or
	modify the default selection.
	Available options are Awarded, Not Awarded, Engineer's Estimate, and
	Cancelled.
	If Engineer's Estimate is selected, then the search result displays the
	engineer's estimates in the <b>Final Estimate</b> workflow status, and the award
	date of the bid in that project is used to calculate the inflation.
	Note: It is not recommended to use the Engineer's Estimate Unit prices to
	develop a Suggested Unit Price.
Density	From the multi-select drop-down list, select the appropriate densities.
	Available options are active densities defined in the <b>Density</b>
	catalog of the library.
Partner Agency	From the multi-select drop-down list, select the appropriate partner
	agencies.
	Available options are active partner agencies defined in the
	Partner Agency catalog of the library.
Terrain	From the multi-select drop-down list, select the appropriate terrains.
	Available options are active terrains defined in the <b>Terrain</b>
	catalog of the library.
Supplemental	Enter any additional description specific to the pay item.
Description	
Quantity between	Enter the range of quantity in the consecutive two numeric fields.
	Nato: The entered much are recent be supported to an O
	Note: The entered numbers must be greater than 0.
	Peeced on the numbers entered in the two numeric fields, the second versit
	displaye only these records where item questity is within this reade
Did Statua	Is the item quentity is converted from a different and healt or measurement
DIU SLALUS	in the item quantity is converted from a different spec book or measurement
	system, then the converted quantity must be within the same range.
item Quantity	Enter the appropriate quantity of the item being searched.

5. To define the additional filter criteria, in the **BID DATE** section, provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Award Date From	From the drop-down list, select the appropriate award date from which the
	search result must be displayed.
Award Date To	From the drop-down list, select the appropriate award date until which the
	search result must be displayed.

The Search Based On field displays Pay Item No.

6. Click Search.

The **SEARCH RESULTS** section displays the following information:

Note: The search results are also sorted and displayed based on the following:

- Bid award date in descending order
- Schedules in ascending order of schedule names
- Bid status

Field Name	Description
<b>Records Selected</b>	The number of records selected from the search results.
Low in \$	The lowest unit price from the selected records.
High in \$	The highest unit price from the selected records.
Suggested Unit	The suggested unit price calculated based on the regression analysis for the
Price	item.
Average Unit Price	The average unit price calculated from the selected records.
in \$	

The dynamic grid displays the information based on the defined search criteria.

- 7. To generate suggested unit price for the pay items, click the check boxes for the appropriate records, and then click **Generate Suggested Price**.
- 8. To view the pay items trend chart that displays the price to quantity graph, click **Graph**.
- 9. Optionally, perform any of the following steps, as applicable:
- To copy search results to an Excel workbook, click Export.
- To reset the search criteria, click Reset.
   Note: The Standard Items Table and Measurement System values are retained.

10. To save the search results, click **Save Results**.

The search results are saved as a record in the **Ad-Hoc Unit Price Search Result** form. For more information, refer to <u>Accessing the Ad-Hoc Unit Price Search Result</u>.

11. Click **Back** to return to the **ENTERPRISE DASHBOARD** page.

# 7.7. Accessing the Ad-Hoc Unit Price Search Result

#### **Overview**

The **Ad-Hoc Unit Price Search Result** contains the log of the saved ad-hoc unit price search results listed under the User's Username. Only the most recent Ad-Hoc Unit Price Search result by a specific user will be saved.

It contains all the information provided in the **Ad-Hoc Unit Price Search** page while searching for the unit price of the required item.

The Ad-Hoc Unit Price Search Result form has the information saved in the following sections:

- Item Details
- Search Criteria
- Bid Date
- Search Results

#### Steps

In the module menu, click Home.
 The ENTERPRISE DASHBOARD page is displayed.

	HOME	ENTERPRISE DASHBOARD
Q,	Type to Search 🗙 🗙 🔺	🖅 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 🖞 New 🧳 Edit 🛅 Delete 🎭 Set As Default
â	Notifications (16)	Report Viewer
<b>⊡</b>	Enterprise Search	(< <u>1</u> a1 ) )
	<ul> <li>Document Search</li> </ul>	PROJECTS BY % COMPLETE
ŵ	🖿 Fund Management	
-	<ul> <li>Report Gallery</li> </ul>	
	<ul> <li>Ad-hoc Reports</li> </ul>	
	Ad-Hoc Unit Price Search Result	
	Ad-Hoc Unit Price Search	
	Recent Projects	
		PROJECTS BY % COMPLETE
>		

Figure 172: Enterprise Dashboard Page

#### Federal Highway Administration

2. In the navigation pane, click Ad-Hoc Unit Price Search Result.



Figure 173: Navigation to Ad-Hoc Unit Price Search Result Form

### The AD-HOC UNIT PRICE SEARCH RESULT list page is displayed.

AD-	AD-HOC UNIT PRICE SEARCH RESULT						
<b>a</b>	Customize List						
	User Name						
	Tavleen						
	Heidi_LeadDesigner						
	Lahoucine_Administrator						
	Lahoucine_Designer						
	Heidi_Administrator						
	Angela_LeadDesigner						
	Lahoucine_LeadDesigner						
	Lahoucine_DesignComponentLead						
	Rahul_admin						
	shadkhan						
	Deepa						
M	<ul> <li>▲ 1 ► ► Page 1 of 1</li> </ul>						

Figure 174: List Page of Ad-Hoc Unit Price Search Result

#### Federal Highway Administration

3. To view the details of the result, select the appropriate result and click **View**.

AD	AD-HOC UNIT PRICE SEARCH RESULT					
۲	View 🖹 Reports 👻	1 Selected X	T			
	User Name					
	Tavleen					
	Heidi_LeadDesigner		:			
	Lahoucine_Administrator					
	Lahoucine_Designer					
	Heidi_Administrator					
	Angela_LeadDesigner					
	Lahoucine_LeadDesigner					
	Lahoucine_DesignComponentLead					
	Rahul_admin					
	shadkhan					
	Deepa					
K		Page	1 of 1			



#### The AD-HOC UNIT PRICE SEARCH RESULT details page is displayed.

Note: By default, the latest search results are displayed.

AD-HOC UNIT PRICE SEARCH RESULT						
(8) Cancel					+	1
ITEM DETAILS						
Standard Items Table	: FP 14	Description	: SOIL EROSION CONTROL, SILT	Unit	: LNFT	
Measurement System	: US Customary		FENCE			
Pay Item No	: 15705-0100					
SEARCH CRITERIA						
Search Based On	: Search In All Projects	Schedule Construction Type	:	Supplemental Description	:	
Contractor	:	Density	:	Schedule Letter	:	
State	:	Terrain	:	Inflation Index	: None	
Partner Agency	:	Item Quantity	: 500	Bid Status	: Awarded,Not Awarded	
Standard Items Table	: FP 14	Quantity To	: 0			
Quantity From	: 0					
BID DATE						
Search Based On	: Pay Item No	Award Date From	:	Award Date To	: 05/28/2024	
SEARCH RESULTS						
Records Selected	: 3		High in \$ : 444.00			
Low in \$	: 15.00	Average Unit I	Price in \$ : 160.00			
Suggested Unit Price	: -590.57					
						p.

Figure 176: Ad-Hoc Unit Price Search Details Page

4. To view the previous or next unit price search results, click •••.

# 7.8. Accessing Recent Projects and Forms

#### **Overview**

In the **Home** and **Projects** modules, you can quickly access the projects and forms that are recently visited.

Note: Recent projects are not displayed to the users on their first login.

#### Steps

- 1. To access the recently visited projects from the Home module, perform the following steps:
  - a. In the module menu, click **Home**.
  - b. In the navigation pane, expand **Recent Projects**, and then click the appropriate project.



Figure 177: Recent Projects - Home Module

Note: From the Home module, you cannot access the recently used forms.

- 2. To access the recently visited projects from the **Projects** module, perform the following steps:
  - a. In the module menu, click **Projects**. The **PROJECTS** list page is displayed.
  - b. In the navigation pane, expand the **Recent Projects** drop-down list, and then select the appropriate project, as shown in the following figure:

Q,	Type to Search	PROJECTS A New Workflow - A Manage Users A Mark Offline/Online O More -		
諭	Select Project 👻	Project Code         Project Name         Project Description	Business Unit Pro	oject Status
	Recent Projects  SIT MT NPS GLAC 14(4) & MT NPS GLACIER 14(1) - RKR(10)	SIT - CA ERFO FS LSPDR 2023-1(10)       SIT - Black Mountain R ERFO spot repairs incl         SIT MT NPS GLAC 14(4) & MT NPS GLACIER       Rehabilitate Many Gla Reconstruction of 12	Central Federal Lands Des Western Federal Lands Co	sign
۵	SIT - CA ERFO FS LSPDR 2023-1(1)	SIT MT NPS GLAC 14(4) & MT NPS GLACIER Rehabilitate Many Gla Reconstruction of 12	Western Federal Lands Cor	nstruction
	SIT - CA EPEO ES I SPDP 2023-1(1)	SIT MT NPS GLAC 14(4) & MT NPS GLACIER Rehabilitate Many Gla Reconstruction of 12	Western Federal Lands Cor	nstruction
	(1)	SIT MT NPS GLAC 14(4) & MT NPS GLACIER Rehabilitate Many Gla Reconstruction of 12	Western Federal Lands Cor	nstruction

Figure 178: Recent Projects

A list of the 10 most recently accessed projects is displayed. The selected project's folder is displayed in the **General** tab.

- c. Optionally, click **All Projects** from the drop-down list to navigate to the **PROJECTS** list page.
- 3. In the **Projects** module, to view the list of the recently viewed forms, perform the following steps:
  - a. In the project navigation pane, click the Quick Access tab, and then expand the Most Viewed Forms folder.

A list of the 15 most recently accessed forms is displayed.

b. Click the appropriate form.

The list page of the form is displayed.

# 8. Reports and Dashboards

A report in Masterworks enables you to view the information in an organized format. Reports are accessible based on the permissions assigned to you.

In Masterworks, you can access the reports through:

- Report Gallery It lists all the pre-configured reports for every module.
- List Page Reports It displays a list of records for a particular form.
- Detailed Report It displays details for a particular record on the list page.
- Ad-hoc Reports Masterworks enables you to create customized reports using Ad-hoc reports.

Dashboard provides a bird's eye view of individual/overall project-related data. You can view preconfigured dashboards available in the application.

Pre-configured dashboards are available in the following modules:

- Enterprise (Home)
- Projects
- Contracts

When the respective modules are clicked, the corresponding dashboards are displayed.

## 8.1. Accessing Pre-configured Reports

#### Overview

Pre-configured reports are available on every list page and include the list page report and the details report.

The following procedure describes the steps to access the **Global Fund List** form reports as an example:

#### Steps

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

The ENTERPRISE DASHBOARD page is displayed.

	HOME	ENTERPRISE DASHBOARD
Q,	Type to Search 🗙 🗙 🔨	🖅 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 🖓 New 🧳 Edit 👔 Delete 🦓 Set As Default
ø	Notifications (16)	Report Viewer
<b>i</b> ≟	Enterprise Search	
	<ul> <li>Document Search</li> </ul>	PROJECTS BY % COMPLETE
<u>ت</u>	Fund Management	
	<ul> <li>Report Gallery</li> </ul>	
	<ul> <li>Ad-hoc Reports</li> </ul>	
	Ad-Hoc Unit Price Search Result	
	Ad-Hoc Unit Price Search	
	Recent Projects	
		PROJECTS BY % COMPLETE
>		

Figure 179: Enterprise Dashboard

2. In the navigation pane, expand **Fund Management**, and then click **Global Fund List**. The **GLOBAL FUND LIST** page is displayed.

	HDME GLOBAL FUND LIST							
Q,	Type to Search X 🗙	D New	廊 Workflow - 📋	Reports 👻 🛱 Excel In	nport / Export 👻 💮 N	lore 💌		T
囟	Notifications (17)	0	Fund Source ID	Fund Source Name	Fund Source Code	Fund Type	Is Active	Created Date
ta.	<ul> <li>Enterprise Search</li> </ul>		<b>T</b>	T	<b>T</b>	T		MM/dd/yyy 🗰 🍸
nn@	= Document Search		GFL-35	C105	C105	cı	<b>V</b>	10/10/2023
	Tund Management		GFL-34	CI04	C104	ci		10/10/2023
<b>(</b> @)	<ul> <li>Global Fund List</li> </ul>		GFL-33	C103	C103	ci	~	10/10/2023
	Report Gallery		GFL-32	CI02	C102	сі	<b>V</b>	10/10/2023
	Ad-hoc Reports		GFL-31	CI01	CI01	сі	×	10/09/2023
	Ad-Hor Linit Price Search Result		GFL-30	CONO2	CONO2	CON		08/18/2023
	Ad-Hoc Unit Price Search		GFL-29	CON1	CON1	CON		08/18/2023
	Recent Projects		GFL-28	CON003	CON003	CON		08/18/2023
			GFL-27	CON	CON	CON		08/18/2023
			GFL-26	CEA01	CEA01	CEA		06/15/2023
			GFL-25	CE05	CE05	CE	~	06/15/2023
			GFL-24	CE04	CE04	CE		06/15/2023
			GFL-23	CE03	CE03	CE	<b>V</b>	06/15/2023
		-						Þ
>		◀	1 ] 2 🕨 🕨					Page 1 of 2

Figure 180: List Page of Global Fund List

- 3. Perform either of the following steps, as applicable:
- To generate the list page report, click **Reports**, and then click **List Page Report**.

GLOBAL FUND LIST							
🗗 New	🗗 Workflow 👻	📔 Reports 👻	ʇ† Exce	el Im	nport / Export 👻 💮 M	ore 🔻	
9	Fund Source ID	📑 List Page	Report	T	Fund Source Code	Fund Type	
	GFL-35	CI05			C105	сі	
	GFL-34	CI04	CI04		CI04	сі	
	GFL-33	CI03			C103	СІ	

Figure 181: List Page Report

• To generate the details report, select the appropriate record, click **Reports**, and then click **Details Report**.

GLC	GLOBAL FUND LIST										
_0	Edit	💿 View	🔟 Delete	卧 Workflow 🗸	Ë	Reports 🝷	@ N	1ail Me	erge 👻	⊙ Mo	ore 👻
	9	Fund Sourc	e ID	Fund Source Name	[	Details Re	port	T	Fund Ty	rpe	
		GFL-35	:	CI05		CI05			CI		
		GFL-34		CI04		CI04			CI		

Figure 182: Details Page Report

# **8.2 Generating Enterprise Reports**

### Prerequisites

You are invited to the projects with the roles that have access permissions to the report.

### Overview

Based on the permissions assigned to you, you can generate various enterprise level reports that comprise information based on the roles assigned to you, and the various projects to which you are invited. You can view selected information using filters and generate reports in multiple report formats.

#### Steps

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

The Enterprise Dashboard page is displayed.

	HOME	ENTERPRISE DASHBOARD
Q,	Type to Search 🗙 🗙 🔨	🖾 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 🗍 New 🧳 Edit 🔞 Delete 🦓 Set As Default
	<ul> <li>Notifications (16)</li> <li>Enterprise Search</li> <li>Document Search</li> <li>Fund Management</li> <li>Report Gallery</li> <li>Ad-Hoc Reports</li> <li>Ad-Hoc Unit Price Search Result</li> <li>Ad-Hoc Unit Price Search</li> </ul>	Report Viewer
>	Rocent Projects	PROJECTS BY % COMPLETE

Figure 183: Enterprise Dashboard

2. In the navigation pane, click **Report Gallery**. The **REPORT GALLERY** page is displayed.

HOME	REPORT GALLERY
C Type to Search X X	Report
Notifications (17)	✓ General
Enterprise Search	Mobile Sync Report
Document Search	
Fund Management	
Report Gallery	
<ul> <li>Ad-hoc Reports</li> </ul>	
<ul> <li>Ad-Hoc Unit Price Search Result</li> </ul>	
Ad-Hoc Unit Price Search	د
Recent Projects	

Figure 184: Enterprise Report Gallery

#### Federal Highway Administration

### 3. In the **REPORT GALLERY** page, double-click the **Mobile Sync Report**.

MOBILE SYN	C REPORT									
🕒 Back	D Subscribe									
Start Date	01/01/2	2023	Ē	End E	ate 07/05/20	24	Ē	5		
Show Aborted	Syncs 🔘 Tru	e 🔿 False								
View Report										
	) / //									
								<b>.</b>		
					INIC	JBILE STIN	L REPOR	.1		
Date	User	Start	End Time	Duration	Is Aborted?	Sync Status	No Of Errors	API Name	Message	Details
	Nume	Inne			Aborteu:					
Generated of Trimezone: (	Generated on : 07/01/2024 12:29 PM Generated by : Trinezone: (UTC-05:00) Eastern Time (US & Canada)) Page 1 of 1 Page 1 of 1									
			(							

Figure 185: Mobile Sync Report

- 4. Select the filter criteria to generate the report.
- 5. Click **View Report**. The Mobile Sync Report is generated and displayed.

## 8.3. Standard Report Functions

Performing all report-related activities is similar in procedure throughout the application. All tasks that you can perform are based on the roles assigned to you in a project and the permissions granted to the roles.

For information on roles, refer to **Security Roles** in the **A02 Administrator Guide**. The standard report functions include the following:

- Generating and Viewing Reports
  - o 8.3.1. Generating a report
  - o 8.3.2. Printing a report
  - o 8.3.3. Saving a report in various formats
  - o 8.3.4. Updating report to view the latest information
- <u>8.3.5. Subscribing to a report</u>

### 8.3.1. Generating a Report

#### Overview

You can generate various reports that comprise information based on the roles assigned to you and the various projects to which you are invited.

For a few reports, you can use the filter criteria to provide information for the relevant fields and generate the reports.

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

#### Steps

Perform any of the following steps, as applicable:

1. In the form list page, click **Reports**, and then click the appropriate report.

PR	ROJECT I	FUND LIST						
Ð	New	卧 Workflow マ	🖹 Reports 🔻	Bt Exce	el Export 🔻	💮 More 🕶		
	Project Fund ID		📑 List Page I	Report	Fund So	Fund Source Code		
		PFL-2	CON02		CON02	CON02		

Figure 186: Using Reports Option

• In the project navigation pane, click **Project Report Gallery**, and then double-click the appropriate report.



Figure 187: Project Report Gallery Navigation Page

• In the project navigation pane, expand the contract folder, click **Contract Report Gallery**, and then double-click the appropriate report.



Figure 188: Contract Report Gallery Navigation Page

2. If filtering options are necessary, select the appropriate information in the relevant fields, and then click **View Report**.

LIST PAGE R	LIST PAGE REPORT										
Back	🕞 Back 🛛 💩 Subscribe										
Include Pending on Users and Roles No											
View Report											
	of 1 🕨 🕨	<u>a</u>		Find   Nex	d <b>∏ <del>v</del> •5</b>						
	PROJECT FUND LIST - LIST REPORT										
Project	Fund	Fund	Fund	Fund	Fund	Account	Account	Authorized	Expended	Remaining	
Fund ID	Source Name	Source Code	Туре	Source Category	Description	Number	Priority	Amount (\$)	Amount (\$)	Amount (	
PFL-1	CON01	CON01	CON	FLAP	This project	1516043		0.00	0.00	0.00	
					fund list for	027201.5					
					fund source	40.CN.V7					
					category	00.04.16					
					FLAP.	0400000					
		-				0.25255					
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00	

Figure 189: Using View Report Option

The report is generated and displayed.

## 8.3.2. Printing a Report

#### Steps

1. Generate the required report.

For more information, refer to Section 8.3.1. Generating a Report.

2. In the report toolbar, click **Print Report**.

LIST PAGE F	REPORT										
Back	Subscribe	e									
Include Pending on Users and Roles No.											
View Report											
<b>I ▲</b> 1	▲ ▲ 1 of 1 ▶ ▶ 🖳 Find   Next 🗋 ▼ 🐼 🔂										
	PROJECT FUND LIST - LIST REPORT										
	-	-	_						_		
Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remainin Amount (1	
PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00	
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00	

Figure 190: Using Print Report Option

## 8.3.3. Saving a Report

### Steps

1. Generate the required report.

For more information, refer to <u>Section 8.3.1. Generating a Report</u>.

2. In the report toolbar, click **Export**, and then click the required option.

PROJECT STATUS REPORT	r							
🕞 Back 🛯 💩 Subscri	be							
Report Version	Active Projects	¥	F	Percent Com	plete Greater Ti	nan 90		
Positive \$ Value Difference 100000				Negative \$ Value Difference 100000				
View Report								
┥ 🖣 🚺 of 1 🕨 🕽		Find	Next	B • 9				
			50	Excel				
				PDF CSV (comr	na delimited)			
Project Number Project	: Name	Contract number	COE		Award Date	Original FCD	Modified FCD	Acceptance Date

Figure 191: Exporting a Report

## 8.3.4. Viewing Latest Information in a Report

#### Steps

- 1. Generate the required report. For more information, refer to Section 8.3.1. Generating a Report.
- 2. In the report toolbar, click Refresh  $^{50}$  .

LIST PAGE F	REPORT									
Back	🛯 Subscrib	De								
Include Pending on Users and Roles No.										
View Report										
H . 1	of 1 🕨 🌢			Find   Ne	d 🗋 🕶 🚱	à				
				PF		ID LIST -	LIST REI	PORT		Î
Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaininį Amount (s
PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00

Figure 192: Using Refresh Option

## 8.3.5. Subscribing to Reports

#### Prerequisites

- You must have access to the report.
- The logged-in user is assigned with the permission to generate the report.

#### **Overview**

You can subscribe to reports, and subscribed reports are delivered to the specified email addresses or saved in the specified file location. You can configure subscriptions so that the reports are delivered periodically in the specified format.

Additionally, you can create multiple subscriptions for a single report with varied subscription options.

You can subscribe to a report using any of the following methods:

• **Email**: The report is delivered through email to the specified email addresses in the specified formats.

Note: Only Masterworks registered email address is allowed to receive the subscribed reports.

• File Share: The reports are saved to the specified location in the specified formats.

**Note**: Users with the appropriate permission can subscribe themselves or others to a report. Only users with the Administrator role can remove or end an active subscription once it is created.

#### Steps

1. Open a report, and then click A subscribe .

BID ANALYSIS REPORT	cribe			
Bidder :	Missouri River Contractors, LLC	~	Minimum Deviation % :	
Maximum Deviation % :				
View Report				

Figure 193: Subscribing a Report

The subscription dialog box is displayed.

SIT Testing Build- FHWA e	Delivery		>
Delivery Option	Schedule Details		
Please select the delivery o E-Mail OWindows F	ption ile Share		
	то *:		
	Cc :		
	Bcc :		
	(ل Reply-To :	Jse (;) to separate multiple	e-mail addresses.)
	Subject *:		
	Priority : 1	Normal	$\sim$
	Comment :		1.
		Include Report	
Re	port Format : F	PDF	~
	Start Date :	07-27-2023 🗸	
Enable so	hedule stop 💠 🔽	٦	

Figure	194:	Subs	cription	Dialog	Box
--------	------	------	----------	--------	-----

Note: To subscribe to a report, you must fill the fields with red asterisks.

- 2. In the **Please select the delivery option** section, perform either of the following steps, as applicable:
- Click E-Mail to receive the report through email.
- Click Windows File Share to save the report to the specified location.
- 3. Based on the delivery option selected, perform the following steps:

En	nail	Wi	indows File Share
a.	In the <b>To</b> box, enter the email	a.	In the File Name box, enter the file name for the
	addresses of the recipients of the		report.
	report.	b.	Select the <b>Add a file extension when the file is</b>
b.	In the <b>Reply-To</b> box, enter the		<b>created</b> check box to save the report file name with
	email addresses of the recipients		the extension of the file format as required for the
	to whom the reply email must be		report.
	delivered.	с.	In the <b>Path</b> box, enter the path of the shared file
с.	In the <b>Subject</b> box, enter the		location where the report must be saved.
	name of the report or any other	NC	ite: To configure the shared file location in the
-1	appropriate subject for the email.	ap	plication, you must provide the file path location to the
a.	From the <b>Priority</b> drop-down list,	Ad	ministrator.
	select the priority of the email. If	a.	From the <b>Report Format</b> drop-down list, select the
	omail will be sent as a High Priority		sound
	notification	۵	saveu. In the <b>Credentials used to access the file share</b>
e	In the <b>Comment</b> box enter any	0.	section enter the credentials to access the shared
0.	comment for the email.		location and save the report.
	Comments are included in the	f.	From the <b>Overwrite options</b> section, click any of the
	body of the email.		following options:
f.	Select the Include Report check		• Overwrite an existing file with a newer version-
	box to deliver the report in the		When saving the report at the file location at the
	selected format as an email		scheduled time, if a file with the same name
	attachment.		exists, then the existing file is overwritten by the
g.	Select the <b>Include Link</b> check box		latest report.
	to deliver the link to the report in		<ul> <li>Do not overwrite the file if a previous version</li> </ul>
	the report delivery email. The		<b>exists</b> - When saving the report at the file location
	recipient can view the report on		at the scheduled time, if a file with the same name
	the application only if the recipient		exists, then the report is not overwritten by the
	has the required permissions on		latest report, and the report is not saved at the file
h	From the <b>Penart Format</b> drop		
11.	down list select the format in		<ul> <li>Increment file names as newer versions are</li> <li>Indeed When so ving the report at the file leastion</li> </ul>
	which the report must be		added- when saving the report at the file tocation
	generated and delivered to the		evists then the latest report is saved with the
	specified email addresses.		same name annended with a sequential number
		g.	From <b>the Start Date</b> list, click the date from when the
		0.	report must be saved.

E	nail	W	indows File Share
i. j.	From the <b>Start Date</b> list, click the date from when the report must be delivered. Select the <b>Stop this schedule on</b> check box, and then select the date until when the report must be	h.	Select the <b>Stop this schedule on</b> check box, and then select the date up to when the report must be saved at the file location.
	check box, and then select the date until when the report must be delivered.		

4. To set the frequency of report delivery, click the **Schedule Details** tab.

SIT Testing Build- FHW	A eDelivery	×
Delivery Option	Schedule Details	
O Hourly	Runs only once	
O Daily	Start time (hh:mm) *: :	
<b>Weekly</b>		
O Monthly		
Once		
	Subscribe	Cancel

Figure 195: Schedule Details Tab

5. From the delivery frequency options, click the appropriate option:

Option	Description	Steps
Hourly	The report is delivered every	a. Click <b>Hourly</b> in the delivery options list.
	preset number of hours.	b. In the Run the schedule every section,
		enter the frequency of report delivery:
		i. In the <b>hours</b> and <b>minutes</b> boxes,
		enter the time period in hours and
		minutes the report must be
		periodically delivered.
		ii. In the <b>Start time</b> (hh:mm) box, enter
		the time (in 24-hour format) the
		report delivery must begin.
Daily	The report is delivered once	a. Click <b>Daily</b> in the delivery options list.
	on preset days, or periodically	b. In the schedule definition section, enter
	as defined.	the frequency of report delivery:
		<ul> <li>Click Every Weekday to get the</li> </ul>
		report delivered on all weekdays,
		from Monday to Friday.
		<ul> <li>Click Repeat after this number of</li> </ul>
		days, and then, then in the box, enter
		the number of days to get the report
		delivered periodically once every
		specified number of days.

Option	Description	Steps
		<ul> <li>In the Start time (hh:mm) box, enter the time (in 24-hour format) the report must be delivered.</li> </ul>
Weekly	The report is delivered every preset number of weeks on preset days of the week.	<ul> <li>a. Click Weekly in the delivery options list.</li> <li>b. Click Repeat after this number of weeks, and then in the box, enter the number of weeks to get the report delivered periodically once every specified number of weeks.</li> <li>c. In the On day(s) section, select the days on which the report must be delivered.</li> <li>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) the report must be delivered.</li> </ul>
Monthly	The report is delivered monthly on preset days of a selected week.	<ul> <li>a. Click Monthly in the delivery options list.</li> <li>b. Select the months when the report must be delivered.</li> <li>c. Click one of the following options to schedule the delivery of the report: <ul> <li>On week of the month</li> </ul> </li> <li>i. From the list of weeks, select the week the report must be delivered.</li> <li>ii. In the On day(s) section, select the days the report must be delivered in the week previously selected.</li> <li>On Calendar day(s)</li> </ul> <li>In the box, enter the number of days of the month the report must be delivered, starting from the current day. For example, if the current day is the 12<sup>th</sup> of a month, and the calendar days set is 10, then the report is sent for 10 days from the 12th of every selected month.</li> <li>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) by when the report must be delivered</li>

## 8.4. Accessing Pre-configured Dashboards

Pre-configured dashboards are available in the following modules:

- Home
- Projects
- Contracts

To access dashboards in the **Home** module, perform the following steps:

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

The ENTERPRISE DASHBOARD page is displayed.

2. From the Select Dashboard drop-down list, select the appropriate dashboard to view.

	HOME	ENTERPRISE DASHBOARD	
Q	Type to Search X 🗙 🗙	🖅 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 Divertient 🗸 Edit 🏛 Delete	
諭	Notifications (17)	Report Viewer	Т
14	Enterprise Search	(	L
	Document Search		L
	Tund Management		L
~	<ul> <li>Global Fund List</li> </ul>		L
	<ul> <li>Report Gallery</li> </ul>		L
	<ul> <li>Ad-hoc Reports</li> </ul>		L
	Ad-Hoc Unit Price Search Result		L
	<ul> <li>Ad-Hoc Unit Price Search</li> </ul>		L
	🖿 Recent Projects		
		PRO IECTS BY % COMPLETE	
>			

Figure 196: Select Dashboard - Home Module

To access the dashboards of a project, perform the following steps:

1. In the module menu, click **Projects**. The **PROJECTS** list page is displayed

PROJECTS			OJECTS	
🔍 Type to Search 🗙 🗙 🔨			New 🙀 Workflow 🗸 📳 Reports 🛪 🗞	Manage Users 🛛 🛱 Mark Offline/Online 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
l∓.	Recent Projects		7	
E CONTRACTOR OF			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
511 - CA ERFO FS LSPDR 2023-1(1)			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
<b>(</b> 2)	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 197: Projects List Page

2. Double-click the appropriate project.

3. From the **Select Dashboard** drop-down list, select the appropriate dashboard to view.



Figure 198: Select Dashboard - Projects Module

To access the dashboards of a contract, perform the following steps:

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

The  $\ensuremath{\text{PROJECTS}}$  list page is displayed

PROJECTS			PROJECTS				
Q Type to Search X X A			Ð	New 🖟 Workflow 🗸 📋 Reports 🛪 🖧	Manage Users 🏾 🎼 Mark Offline/Online 🛛 💮 More 👻		
諭	Select Project		0	Project Code	Project Name Project Description Business Unit		
挿	Recent Projects						
en@	All Projects			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands		
				SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands		
(Q)				SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands		
				SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands		

Figure 199: Projects List Page

- 2. Double-click the appropriate project, and in the navigation pane, expand the project folder.
- 3. In the navigation pane, expand **Contracts**, and then click the contract. The **CONTRACT DASHBOARD** page is displayed.

4. From the **Select Dashboard** drop-down list, select the appropriate dashboard to view.

	PROJECTS	CONTRACT DASHBOARD CONTRACT DETAILS				
С,	ype to Search 🗙 🗙 🔨	🗓 Select Dashboard: Contract Summary Dashboard 🗸 🗸	Mode: View	∽ 📮 New	_Ø Edit 📆 Delete	🖏 Set As Default
畲	SIT - CA ERFO FS LSPDR 2023-1(1) 💌	Report Viewer	1		•	
1	General Quick Access	🕅 🖣 🔲 aft 🕨 📄 🗮 🛅 🖛 🚔				
	Funding Rules	CONTRACT SUMMARY D	15HBOARD			
102	+ Bid Estimate Information					
	+ Bidding	Key Factors	Value			
		Estimated To Date Amount	\$	2,497,028.56		
	- Contracts	Paid to Date	\$	1,803,309.28		
	- SIT - CA ERFO FS LSPDR 2	Retainages	\$	37,500.00		
	+ Documents	<b>Total Current Authorized Construction Amount</b>	\$	6,620,948.83		
	, botamenta	Construction Probable Amount	\$	3,097,837.41		
	+ Configurations	Deficit	S	(3,523,111.42)		
	<ul> <li>Contract Items</li> </ul>	Total Current CE/CE-CI Expenditures	s	0.00		
	New Yorking	Total Probable CE/CE-CI Expenditures	\$	0.00		
	- Progress macking	Current Days Used		276		
	<ul> <li>Contractor Daily Rec</li> </ul>	Percent Work Completed		80.61%		
	Inspector Daily Record	Percent Time Used		58.47%		
		Total Claim Amount Paid (\$)		\$0.00		
	Daily Diary	Total Claims Paid Post Closure of Contract (\$)		\$0.00		
	Labor/Equipment	Total Subcontract Amount		\$323,000.00		
	<ul> <li>Work Activity Templa</li> </ul>	Subcontract % of Contract		4.88%		
	+ Billings & Payments					
>	Contract Modifications					

Figure 200: Select Dashboard - Contracts

## 8.5. Dashboards

Dashboards provide a quick view of enterprise, project, and contract information that is configured to your preferences. Dashboards are configurable both at the enterprise level and at the project level for individual projects and associated contracts. There is no limit on the number of dashboards that you can create and use.

Dashboard information is organized in various pre-defined layouts that are selectable. You can configure dashboards in the various presentation layouts and add widgets to them. Web part zones are organized based on the selected layout. Widgets are added to these web part zones that display relevant information.

Information displayed in dashboards is based on the following criteria:

- Roles assigned to the user
- Projects to which the user is invited
- Contracts to which the user is invited

The following sections describe how to work with dashboards:

- <u>8.4. Accessing Pre-configured Dashboards</u>
- <u>8.5.1. Configuring a Dashboard</u>
- 8.5.2. Adding Widgets to a Dashboard
- <u>8.5.3. Customizing a Widget</u>
- <u>8.5.4. Viewing a Dashboard</u>

- 8.5.5. Setting a Dashboard as the Default Dashboard
- <u>8.5.6. Modifying Dashboard Details</u>
- <u>8.5.7. Deleting a Dashboard</u>

## 8.5.1. Configuring a Dashboard

#### Overview

Configuring a dashboard involves first selecting the dashboard layout, and then adding widgets to the dashboard. The dashboard layout is a collection of web-parts organized in various patterns.

#### Steps

- In the module menu, click Home.
   The ENTERPRISE DASHBOARD page is displayed.
- 2. Click New.



Figure 201: Enterprise Dashboard

New Dashboard	×
Name	:
Description	:
Visible To	: 🔘 Me 🔘 Roles
Roles	Select Roles
Layout	
	Save Save & Design Cancel

The New Dashboard dialog box is displayed.

Figure 202: New Dashboard

3. In the Name box, enter the name for the dashboard.

- 4. In the **Description** box, enter a brief description of the dashboard.
- 5. From the **Visible To** options, perform either of the following steps:

Note: This option is available to users with the Administrator role.

- Click **Me** if the dashboard is only for your viewing.
- Click **Roles** to select roles for which the dashboard is made available. If **Roles** is selected, then in the **Roles** box, enter the role name and select the role name. Users assigned to the selected roles can view the created dashboard.
- 6. From the **Layout** options, click the required layout.
- To save the dashboard, click Save.
   Alternatively, click Save & Design to start adding widgets to the dashboard.

### 8.5.2 Adding Widgets to a Dashboard

#### Overview

Based on the roles assigned to you, you can add specific widgets to the web part zones in the dashboards. Certain widgets allow drill-down and drill-through options to view detailed information. Also, you can toggle between tabular and graphical representation of information.

#### Steps

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

The **ENTERPRISE DASHBOARD** page is displayed.

2. From the Select Dashboard drop-down list, select the required dashboard to add a widget.



Figure 203: Selecting Dashboard
3. From the **Mode** drop-down list, select **Add Widgets**.

ENTERPRISE DASHBOARD						
Le Select Dashboard: Project Dashboard	✓ Mode:	View 🔊	🞝 New	_Ø Edit	🔟 Delete	🍋 Set As Default
Report Viewer		View Edit Widgets Add Widgets				
🗐 🖣 1 of 1 🕨 🕅 🖳 💼 🔻 🚍						
PROJECTS BY % COM	PLETE					

Figure 204: Mode - Add Widgets

The **Catalog Zone** section is displayed.

ENTERPRISE DASHBOARD	
Select Dashboard:         Project Dashboard         ✓         Mode:         Add Widgets	V 🎝 New 🧳 Edit 🔟 Delete 🖏 Set As Default
Web Part Zone 0	Catalog Zone Close
Report Viewer	🔺 🔟 Aurigo Parts
◀ ◀ 1 of 1 ▶ ▶  🖳 🛅 ▾ 🚖	Report Viewer
PROJECTS BY % COMPLETE	Add to: Web Part Zone 0 🗸 Add Close

Figure 205: Adding Widgets

- 4. In the **Catalog Zone** section, select the widgets to add to the dashboard. Alternatively, to add Web Part widgets, in the **Catalog Zone** section, click **Web Parts Catalog**.
- 5. From the **Add to** drop-down list, select the web part to which you want to add the selected widgets.



Figure 206: Add to - Web Part Zones

6. Click Add. The selected widgets are added to the dashboard.You can continue to customize information displayed in the added widgets.

### 8.5.3. Customizing a Widget

### Prerequisites

At least one widget is added to the dashboard.

#### Overview

In a dashboard, you can customize the web part properties, such as the layout, title, appearance, and the project for which the report is displayed.

#### Steps

- 1. In the module menu, click **Home**. The **ENTERPRISE DASHBOARD** is displayed.
- 2. From the **Select Dashboard** drop-down list, select the dashboard that displays the required widget.

	HOME	ENTERPRISE DASHBOARD
٩	Type to Search 🛛 🗙 🗙	🖅 Select Dashboard: Project Dashboard 🗸 Mode: View 🗸 💭 New 🍠 Edit 🝈 Delete
â	Notifications (17)	Report Viewer
I∰	Enterprise Search	🛛 🚽 1 🔹 ot 1 🕨 🕅 🗮 🔂 🖛 🚍
	<ul> <li>Document Search</li> </ul>	PROJECTS BY % COMPLETE
ŵ	Eund Management	
	<ul> <li>Global Fund List</li> </ul>	
	<ul> <li>Report Gallery</li> </ul>	
	<ul> <li>Ad-hoc Reports</li> </ul>	
	Ad-Hoc Unit Price Search Result	
	Ad-Hoc Unit Price Search	
	🛅 Recent Projects	
		PROJECTS BY % COMPLETE
1		

Figure 207: Select Dashboard

3. From the **Mode** drop-down list, select **Edit Widgets**.

	ENTERPRISE DASHBOARD			
ľ	Select Dashboard: Project Dashboard	✓ Mode: View	ew 🌈 Edit 👖 Delete	🍓 Set As Default
	Report Viewer	View Edit Widgets		
	🗐 🖣 1 of 1 🕨 🕅 🖳 🔝 🖛 🛣			
	PROJECTS BY % CO	IPLETE		

Figure 208: Mode - Edit widgets

The title bar menu options are displayed in the widget.



Figure 209: Title Bar Menu

4. Click Edit. The Editor Zone is displayed.

ENTERPRISE DASHBOARD	
🖬 Select Dashboard: Project Dashboard 🗸 Mode: Edit Widgets 🗸 New	_🖉 Edit 🗻 Delete 🖏 Set As Default
Web Part Zone 0	Editor Zone
Report Viewer 🔺 📋	Modify the properties of the Web Part, then click OK or Apply to apply your changes.
{	Report Viewer Configuration
PROJECTS BY % COMPLETE	Report Server Tree:
	Project by Budget Spen Project by Budget Spen Project by % Complet Resource Amount by Re Resource Cost per Mon Portfolio Budget Vs Exp Portfolio Project Distrib Provious Month's Dash Getting Started /ProjectsByPercentComplete
PROJECTS BY % COMPLETE	Show ToolBar  Appearance Title: Report Viewer Chrome Type: Default

Figure 210: Editor zone

Note: Based on the module selected, files displayed in the Editor Zone varies.

5. In the **Editor Zone**, make the required changes as described in the following table.

Web Part Property	Description
Title	Enter the name of the widget.
Chrome Type	Set the border and title of the dashboard tile.
Direction	Set the alignment of the widget.
Height	Set the height of the widget.
Width	Set the width of the widget.

Web Part Property	Description	
Chrome State	The Minimize option does not show the dashboard content by	
	default. Expand the widget to see the dashboard.	
Zone	Select the web part zone of the widget.	
Zone Index	Enter a number to define the priority of a widget within a zone to	
	allow ordering by index.	

6. Click **OK** to apply the changes and close the editor.

Chrome State:		
Normal	~	
Zone:		
Web Part Zone 0	~	
Zone Index:		
0		

Figure 211: Apply the changes

7. From the **Mode** drop-down list, select **View**.

### 8.5.4. Viewing a Dashboard

#### Overview

You can open a dashboard to view the dashboard details.

#### Steps

In the module menu, click Home.
 The Enterprise Dashboard is displayed.

2. From the Select Dashboard drop-down list, select the required dashboard to view the dashboard.



Figure 212: Select Dashboard

# 8.5.5. Setting a Dashboard as the Default

#### Overview

On logging into the application, the dashboard that is set as the default dashboard is displayed on the Home page.

#### Steps

- 1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
- 2. From the **Select Dashboard** drop-down list, select the dashboard to be set as the default dashboard.
- 3. In the dashboard toolbar, click Set As Default.



Figure 213: Set as Default

### 8.5.6. Modifying Dashboard Details

#### Overview

You can modify details of a dashboard.

#### Steps

- 1. In the module menu, click Home. The Enterprise Dashboard is displayed.
- 2. From the **Select Dashboard** drop-down list, select the required dashboard to edit the dashboard.
- 3. In the dashboard toolbar, click Edit.



Figure 214: Edit

The Edit Dashboard dialog box is displayed.

Edit Dashboard		×
Name	*: Project Dashboard	
Description	:	
Visible To	: 🖲 Me 🔾 Roles	
Layout		
	Save Save & Design Cancel	

Figure 215: Edit Dashboard Dialog Box

4. Modify the required information.

# 8.5.7. Deleting a Dashboard

#### Steps

- 1. In the module menu, click **Home**. The **Enterprise Dashboard** is displayed.
- 2. From the **Select Dashboard** drop-down list, select the dashboard to delete.
- 3. In the dashboard toolbar, click **Delete**.

	HOME	ENTERPRISE DASHBOARD
୍	Type to Search 🗙 🗙 🔨	🖅 Select Dashboard: Project Dashboard 🗸 Mode: View V 🖓 New 🖉 Edit 🛅 Delete 🏘 Set As Default
) 证 ⑦	Notifications (17) Enterprise Search Document Search Fund Management Report Gallery A hoc Reports	Report Viewer ▲ M ④ 1 ▶ N R T T PROJECTS BY % COMPLETE
	Ad-Hoc Unit Price Search Result     Ad Hoc Unit Price Search     Recent Projects	
>		PROJECTS BY % COMPLETE

#### Figure 216: Delete Dashboard

# 9. Library Overview

The Masterworks Library module serves as a collection of catalogs to manage reusable data. Catalogs are where you create, define, and store reusable information that is used when you must provide standard inputs to complete forms and information fields. With the Masterworks Library, you can store and manage catalogs of common, configurable, and reusable information. This ensures consistency in available information and provides a standardization factor to ensure data integrity.