U.S. Department of Transportation
Federal Highway Administration

Introduction to Masterworks Participant Guide

Contents

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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 https://fhwa.masterworkslive.com/ 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.

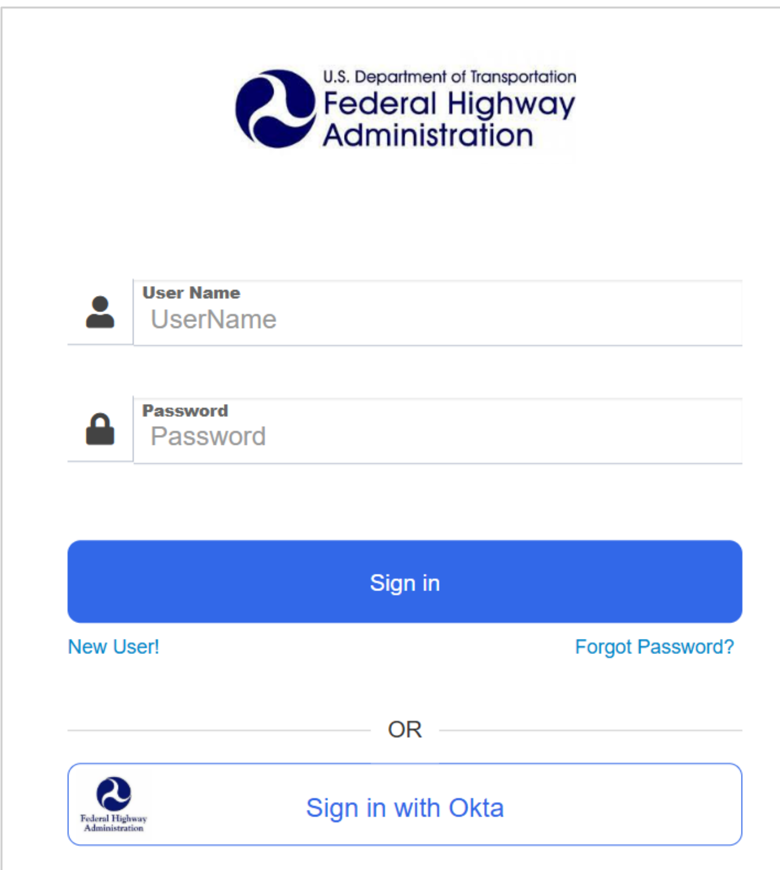


Figure 1: Login Page

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:

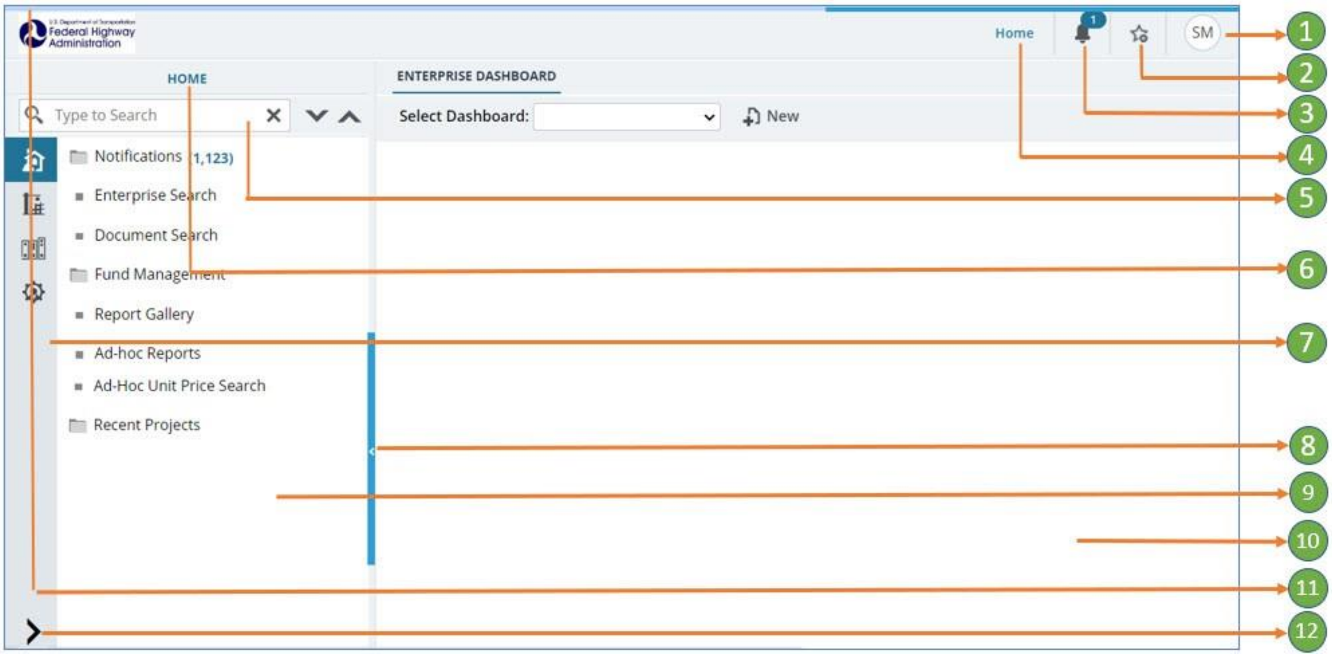
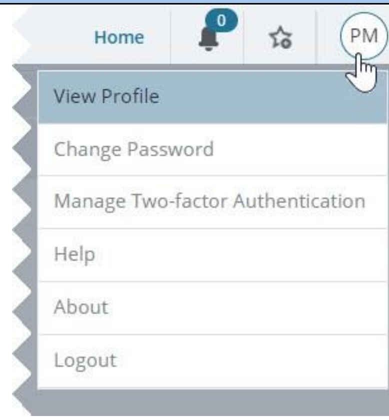
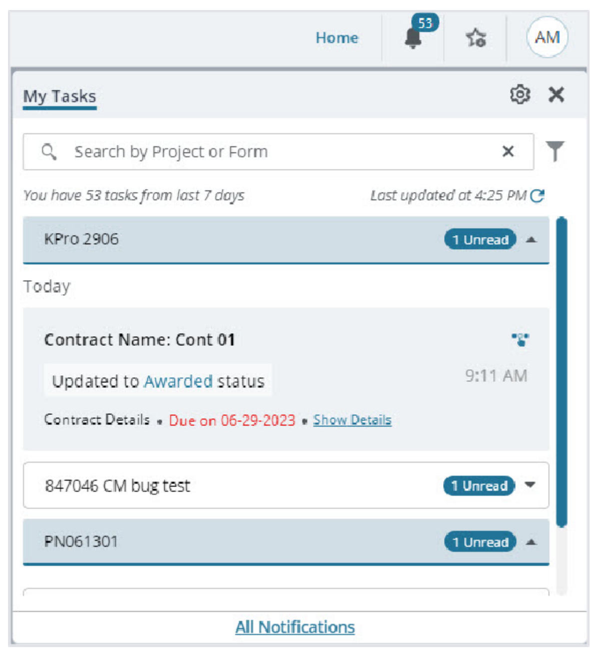
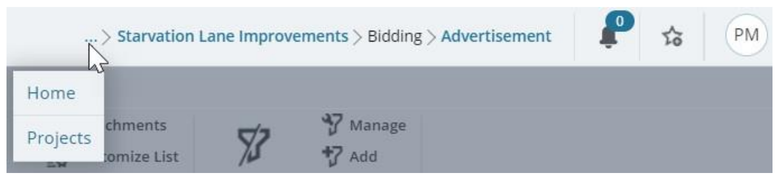
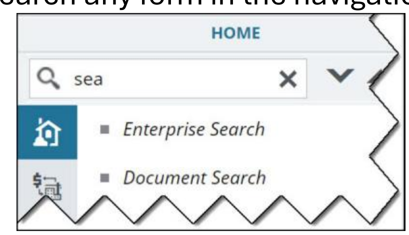


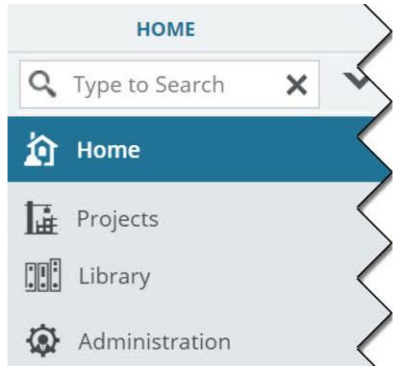
Figure 2: Masterworks User Interface

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
		 *Figure 3: Profile menu* **Note**: The **Manage Two-Factor Authentication** option appears in the profile menu if the **Enable 2 Factor Authentication** field is selected in the **Administration** module.
2	Favorites	You can bookmark frequently used pages for easy and quick access from anywhere in the application.
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.  *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 trails/Breadcrumbs	Displays the trail of page navigation links to track your location within the application. Click a link to open the page.  *Figure 5: Navigation Trail / Breadcrumbs* Expand the breadcrumb trail to access the whole trail.  *Figure 6: Whole Navigation trail / Breadcrumbs*
5	Form finder	You can quickly search any form in the navigation pane.  *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 to you.
8	Toggle button – Pane	Button to show, hide, and re-size application panes. Docking the left pane provides more space to view information in the right pane. 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 – Modules	Button to show the module names in Masterworks. Click the toggle button › to view the module names.  *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:

- Toolbar options
- Navigation pane controls
- Page navigation controls
- Others

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	Edit	Edit form information.
View	View	View form information.
Delete	Delete	Delete the record.
Copy	Copy	Create a new form by copying specific information from a selected form.
History	History	• View the workflow history of the selected form. • Display the attachments added or linked to the form on a workflow transition.
Associate	Associate	Change the default workflow of a form.

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

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
1	Current page
1 2 3	Pages
	Navigate to next page
	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. **Sort**: 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. **Filter**: 1. Enter the search criteria in the filter text box in the required column. 2. Click . 3. Click the appropriate filter option for the specified filter criteria. 4. To use a filter expression, select the appropriate logical operator and then click Filter.
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 out	Pop-up with session time out details	The session timeout notification is displayed after the specified time duration before the application logs off automatically. Click **Continue** to continue the current session.

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

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

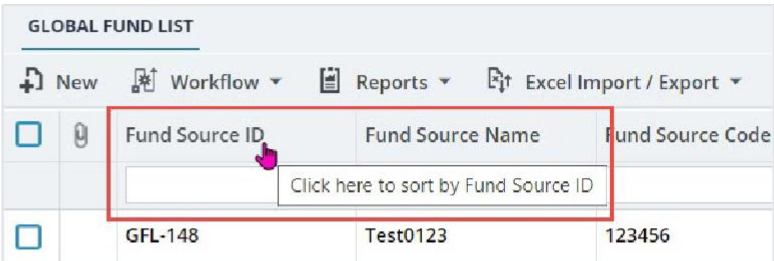


Figure 9: Sorting on List Page

- **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**.

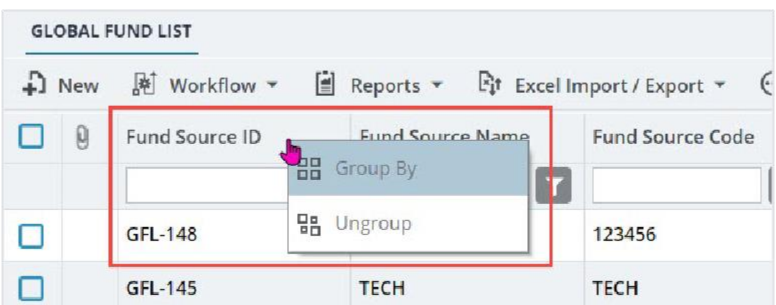


Figure 10: Grouping Records in List Page

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.

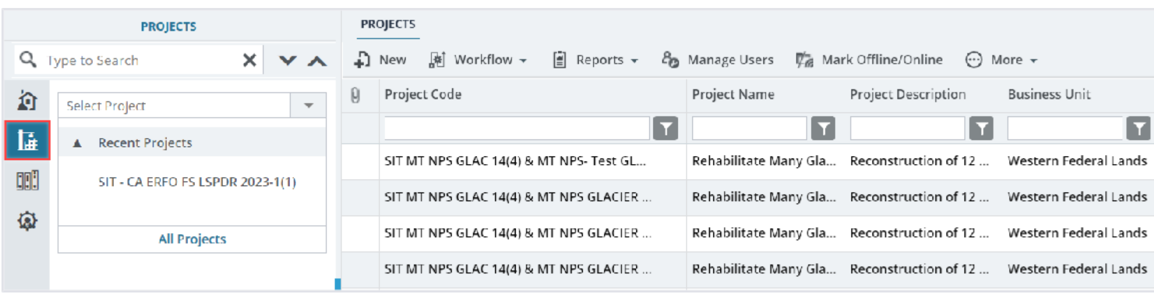


Figure 11: Navigation to Project module

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.

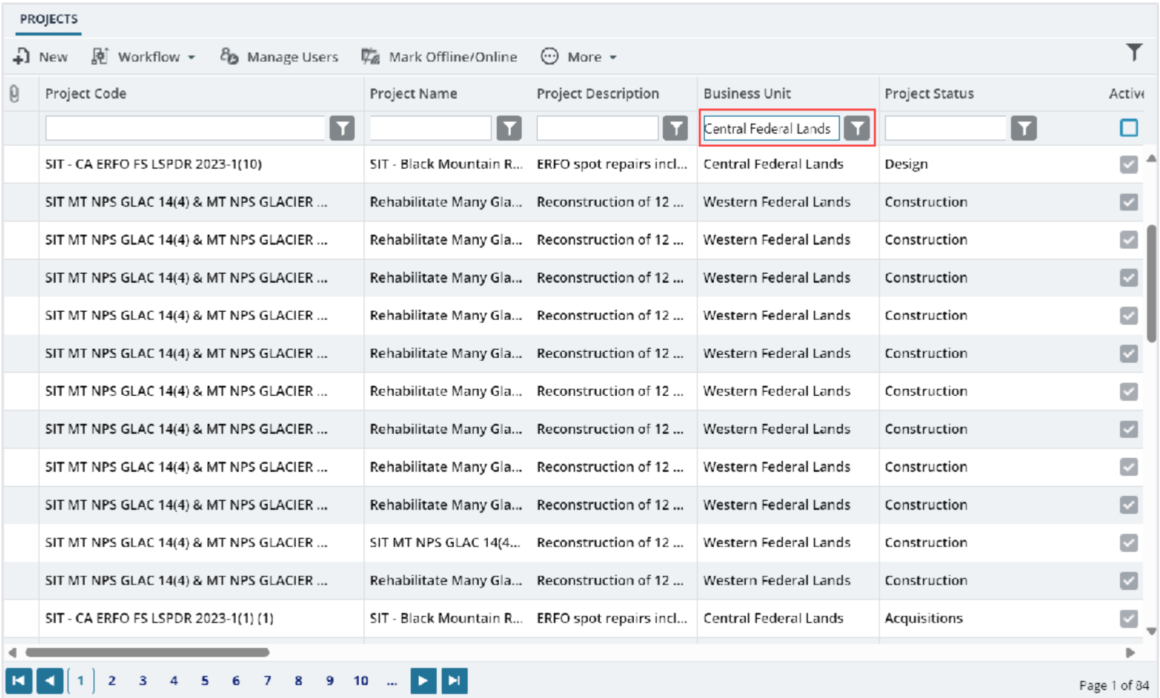


Figure 12: Filtering Criteria

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.

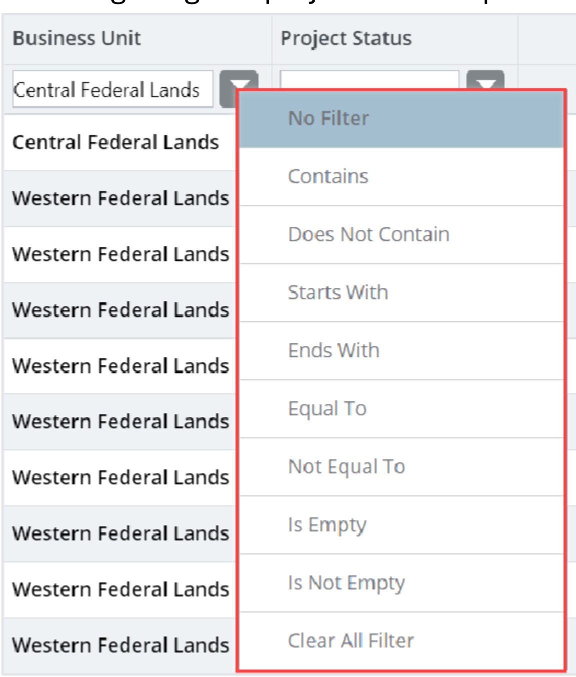


Figure 13: Filtering Options

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.

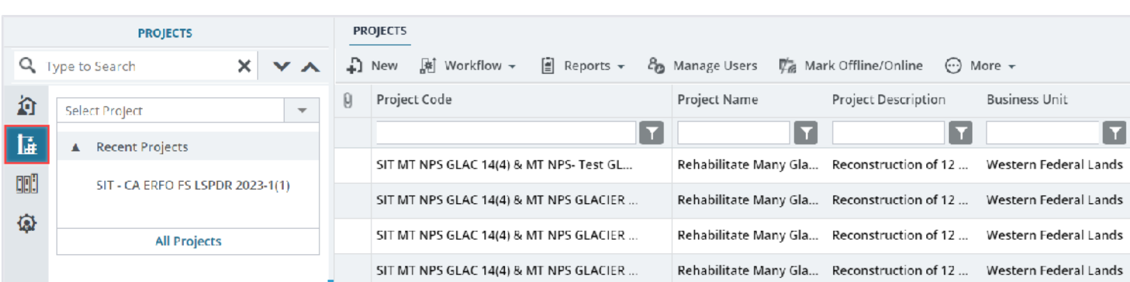


Figure 14: Navigation to Projects module

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

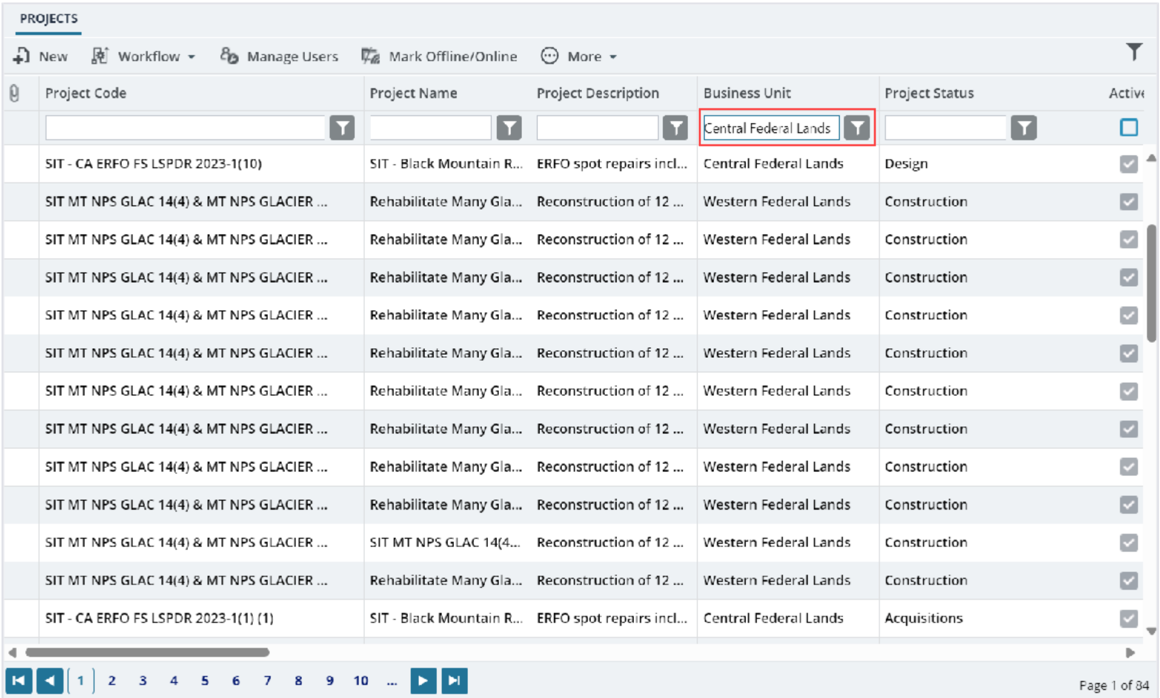


Figure 15: Filter

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

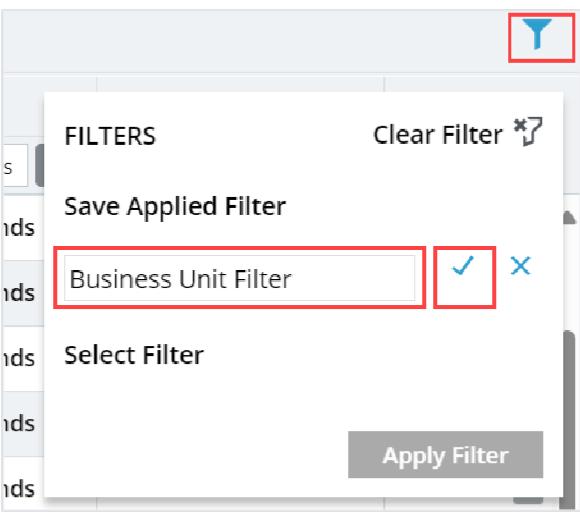


Figure 16: Filters Dialog Box

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

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

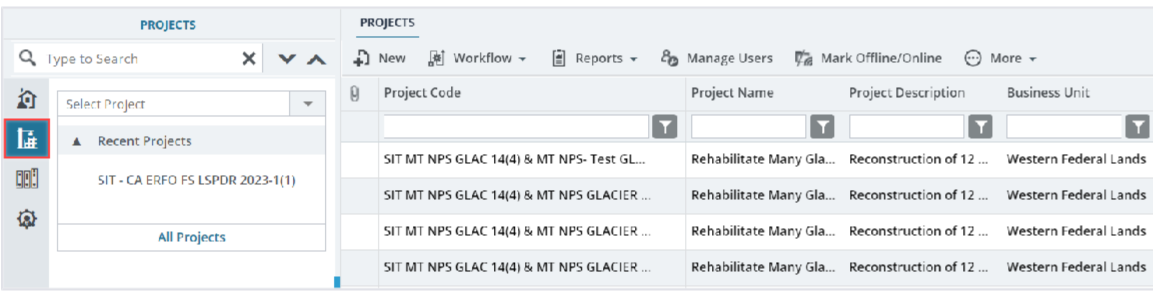


Figure 17: Navigation to Projects modules

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

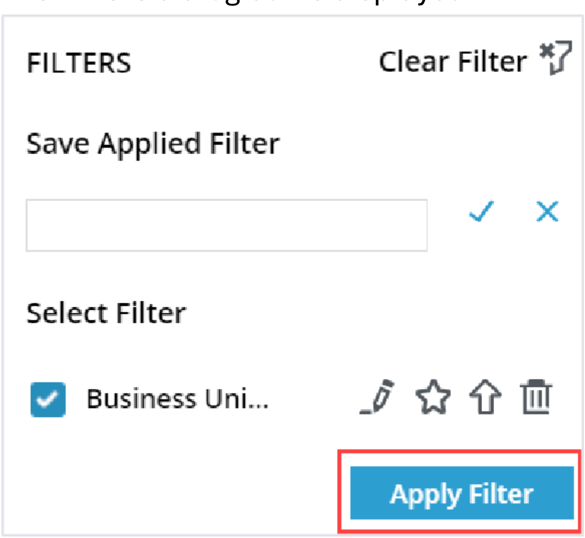


Figure 18: Select and Apply Filter

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 in the toolbar changes to blue.
6. Optionally, to clear the filter, in the tool bar, click , 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.

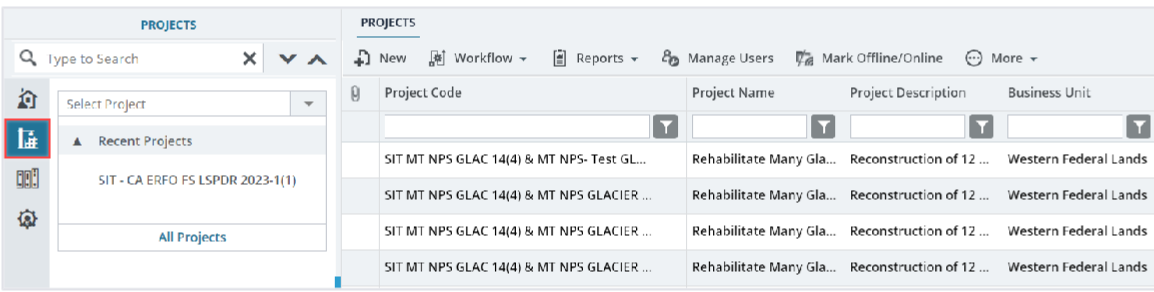


Figure 19: Navigation to Projects modules

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

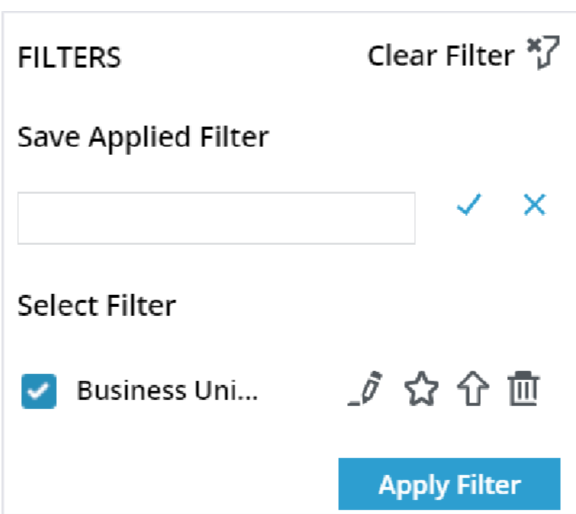


Figure 20: Filters Dialog Box

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

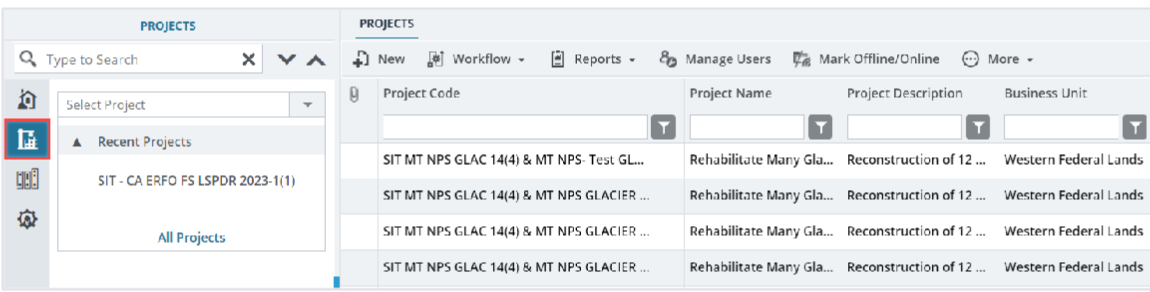


Figure 21: Navigation to Projects Module

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

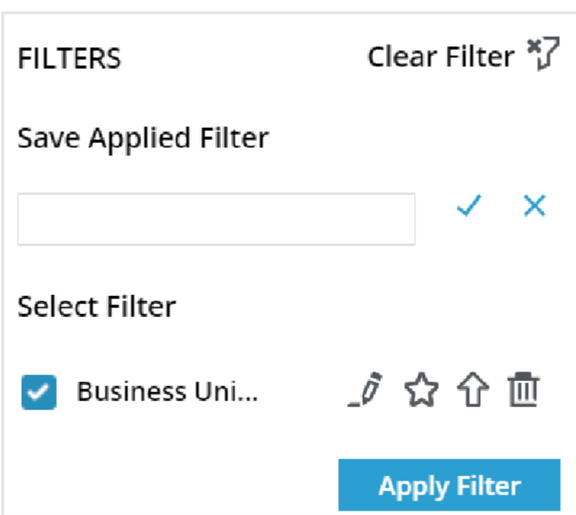


Figure 22: Filters Dialog Box

3. In the **Select Filter** section, select the appropriate filter. Available options are filters defined for the page.
4. Click to edit the name of the filter.
5. In the text box, rename the filter, and then click .

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.

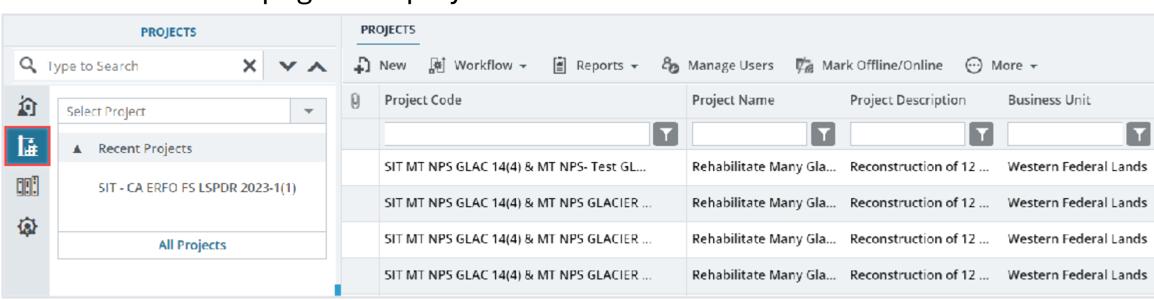


Figure 23: Navigation to Projects module

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

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

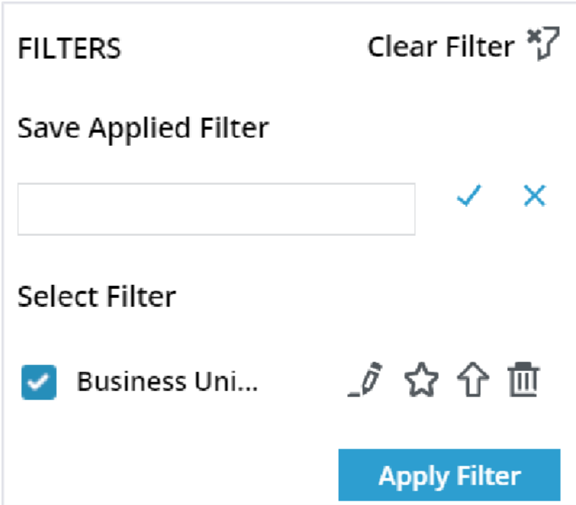


Figure 24: Filter Dialog Box

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

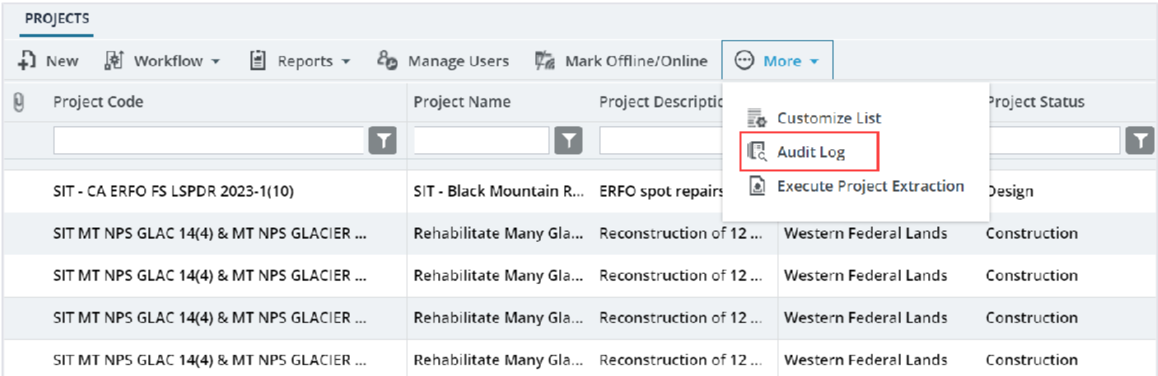


Figure 25: Audit Log

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

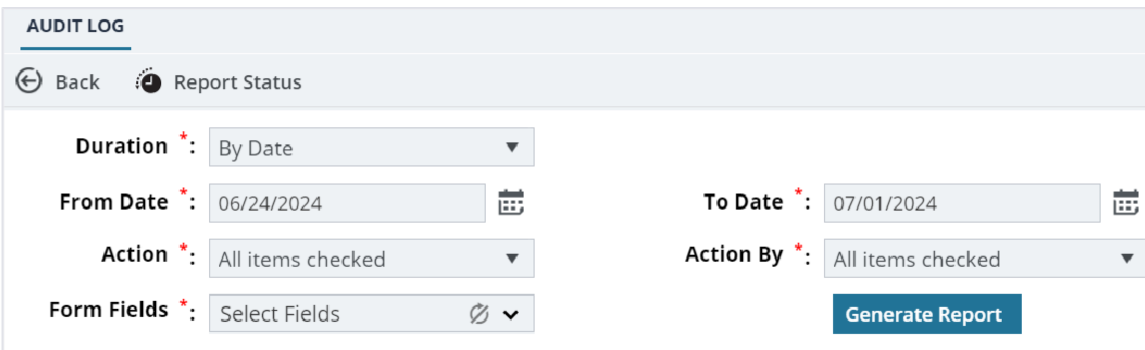


Figure 26: Audit log Details Page

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	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: • If the selected option is **By Date**, then perform the following steps: a. Corresponding to **From Date**, click , and select the date from which the audit log information must be displayed. b. Corresponding to **To Date**, click , and select the date until which the audit log information must be displayed. • If the selected option is By Month, then perform the following steps: a. From the **Month** drop-down box, select the month for which the audit log information must be displayed.

Filter Option	Description
	b. From the **Year** drop-down box, select the year for which the audit log information must be displayed. • If the selected option is **By Quarter** then perform the following steps: a. From the **Quarter** drop-down box, select the quarter for which the audit log information must be displayed. b. From the **Year** drop-down box, select the year for which the audit log information must be displayed.
Action	Select any of the following options: • Select **Delete** to view details of fields that were deleted. • Select **Insert** to view details of fields that were inserted. • Select **Update** to view details of fields that were updated.
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**.

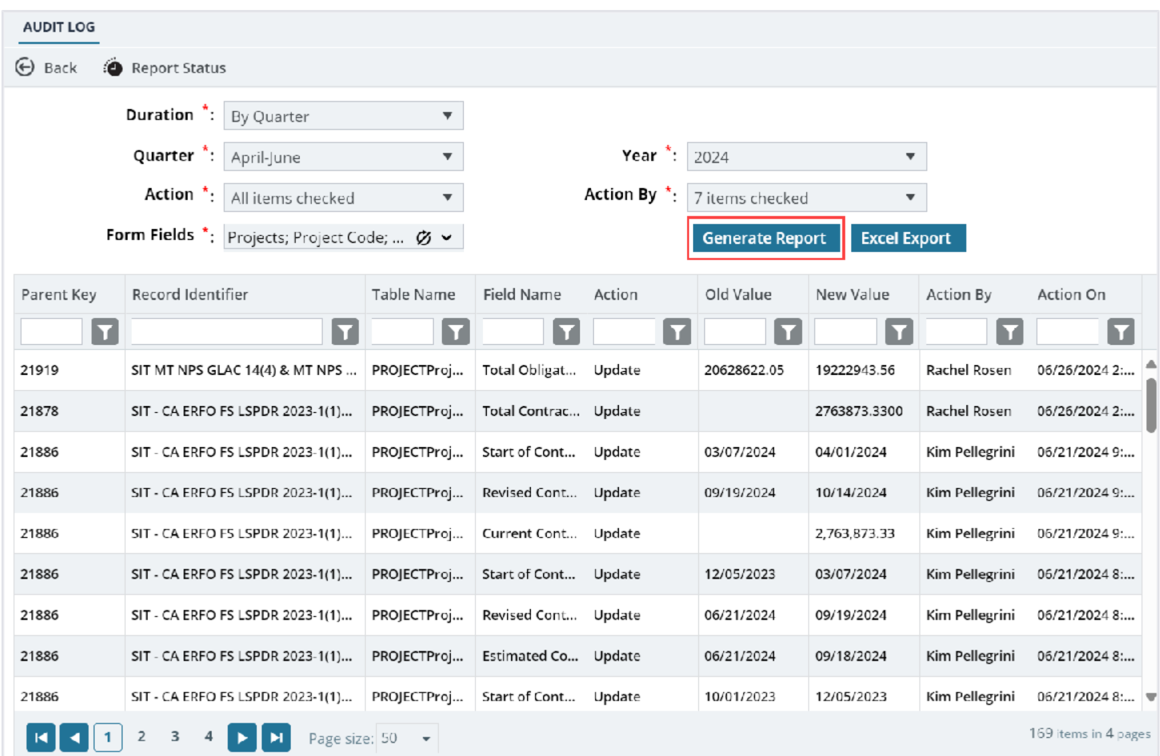


Figure 27: Audit Log Results

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**.

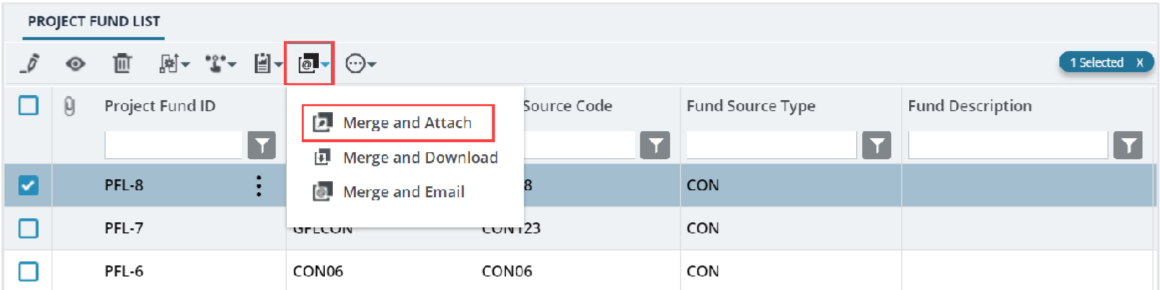


Figure 28: Merge and Attach

The **Merge And Attach** dialog box is displayed.

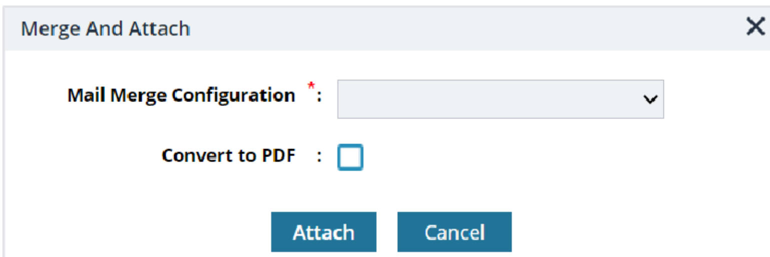


Figure 29: Merge and Attach Dialog Box

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**.

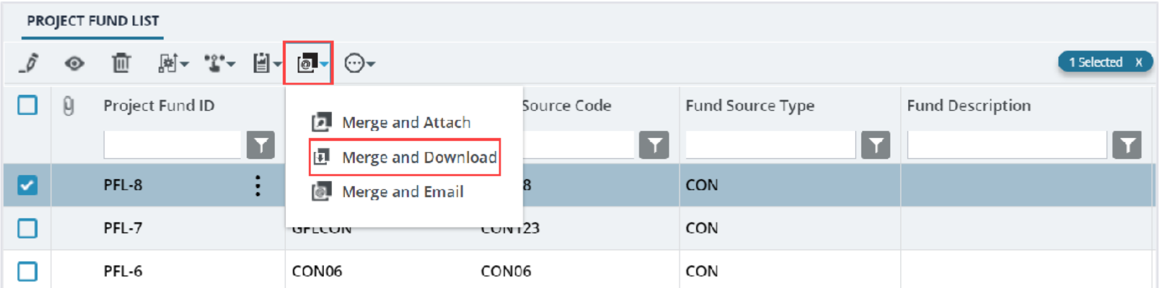


Figure 30: Merge and Download

The **Merge And Download** dialog box is displayed.

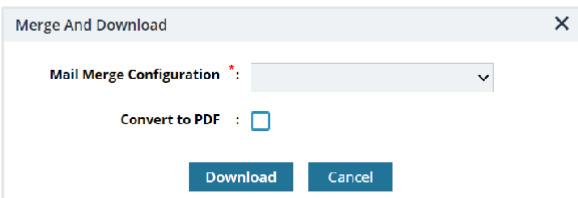


Figure 31: Merge and Download Dialog Box

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**.

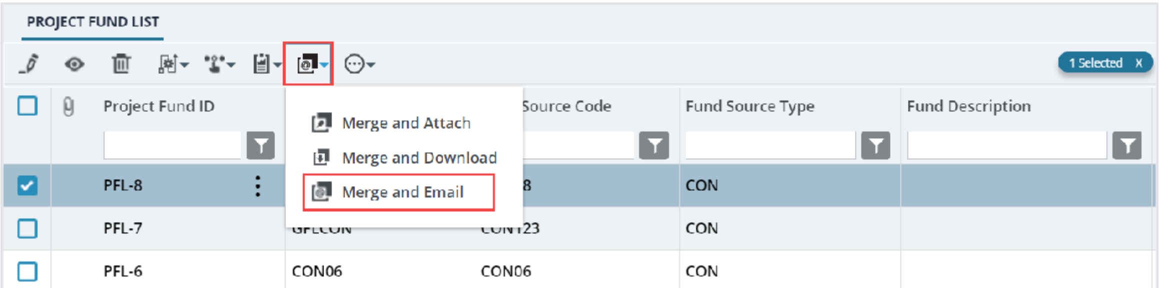


Figure 32: Merge and Email

The **Merge And Email** dialog box is displayed.

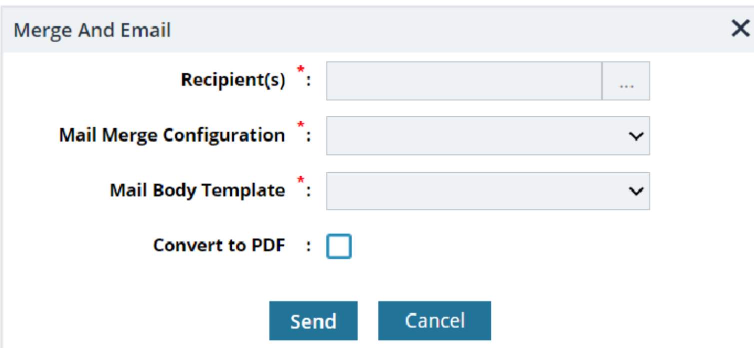


Figure 33: Merge and Email Dialog Box

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.

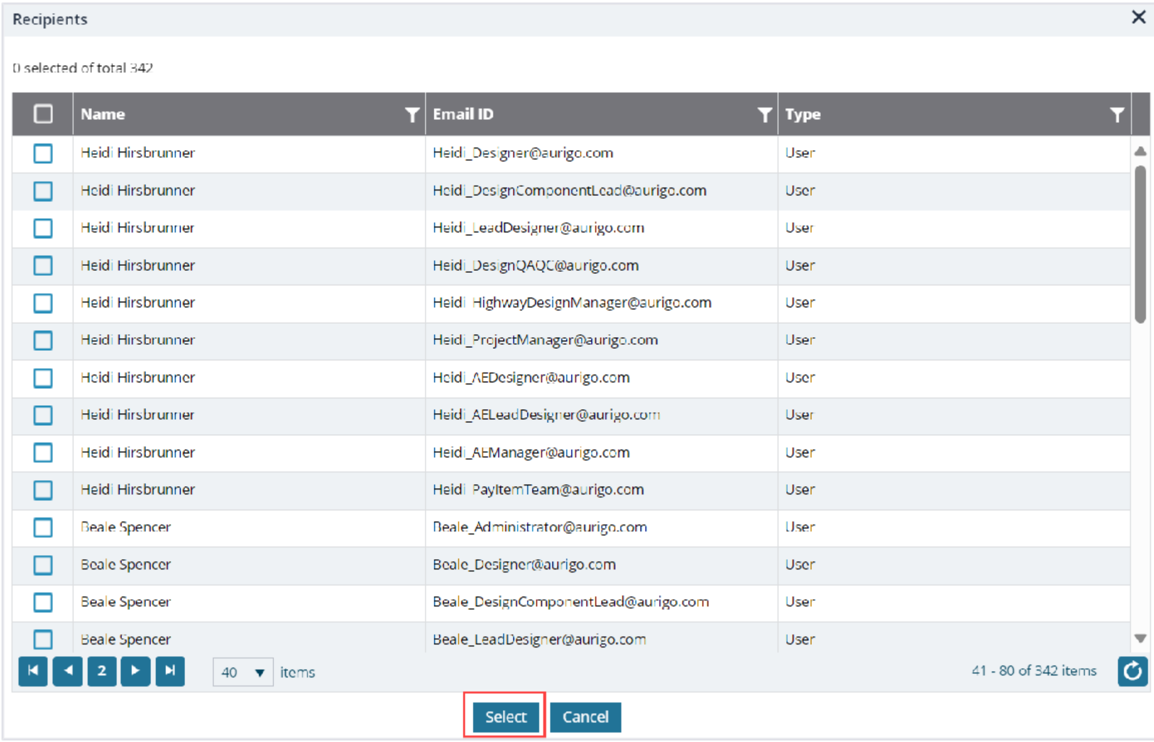


Figure 34: Recipients Dialog Box

      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.

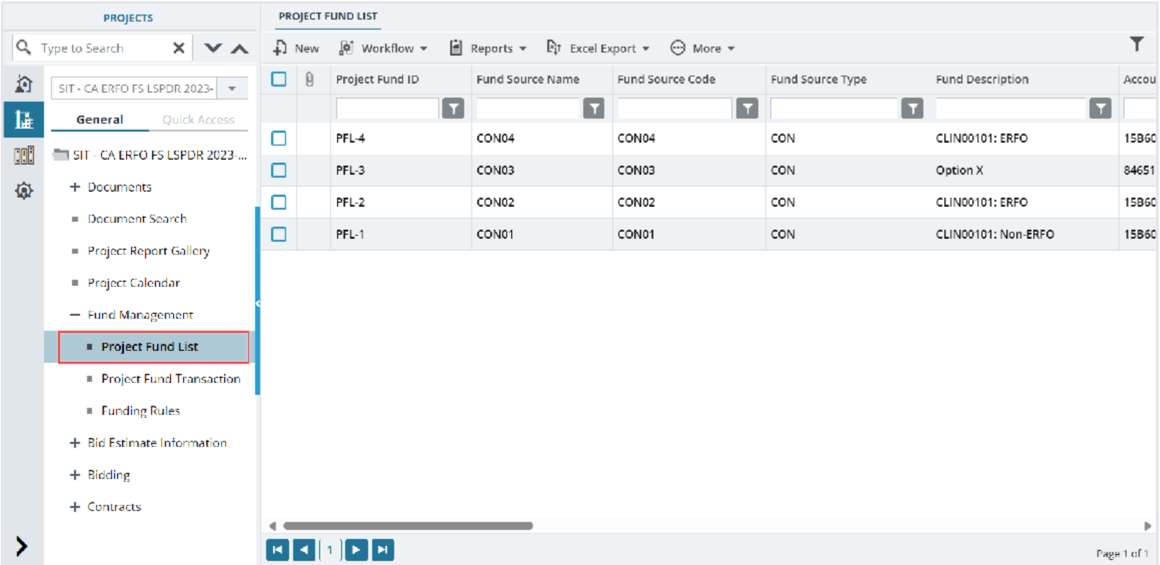


Figure 35: List Page

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

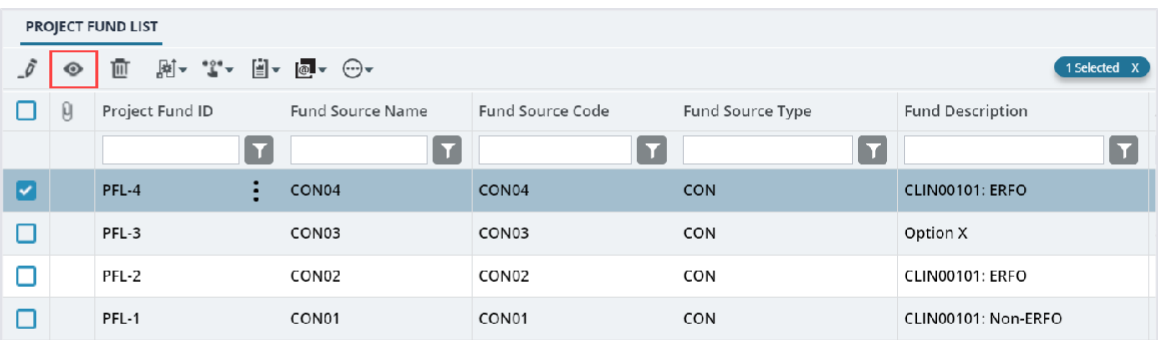


Figure 36: List Page

The details page of the form is displayed.

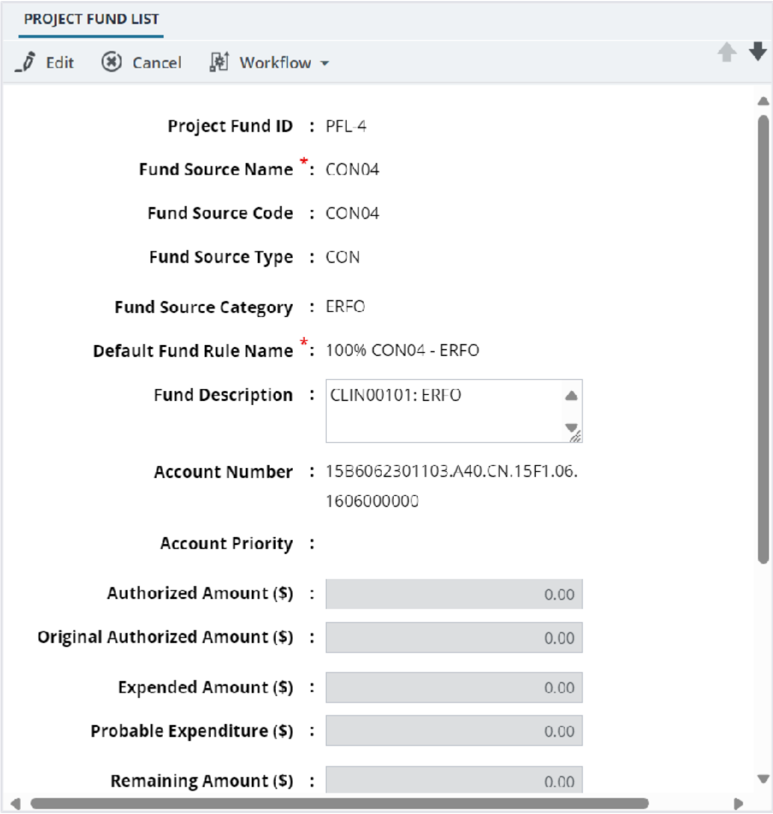


Figure 37: View the Record

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.

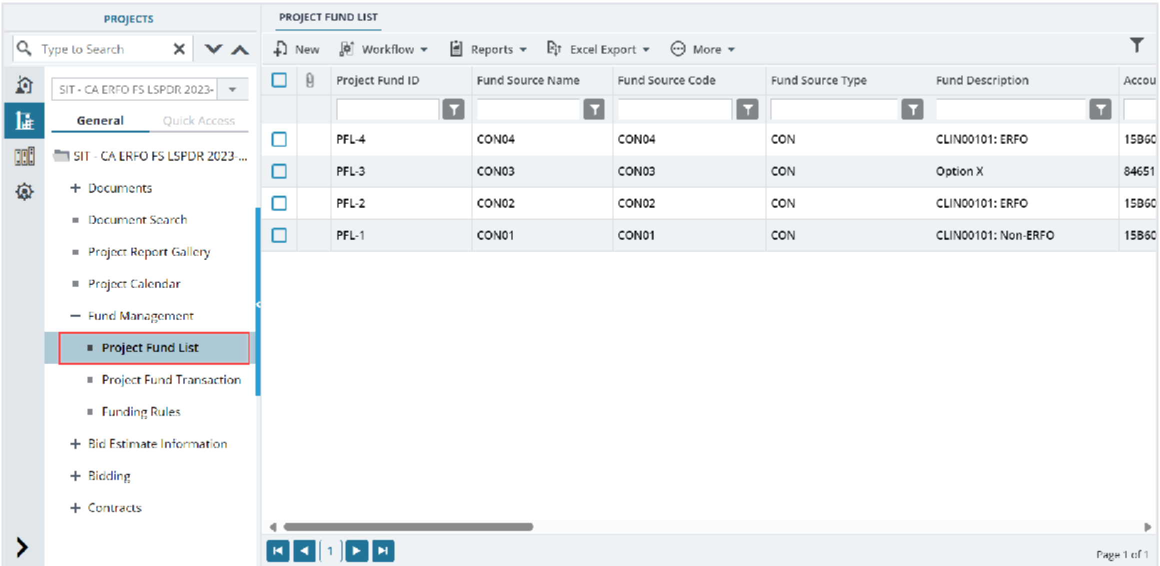


Figure 38: List Page

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

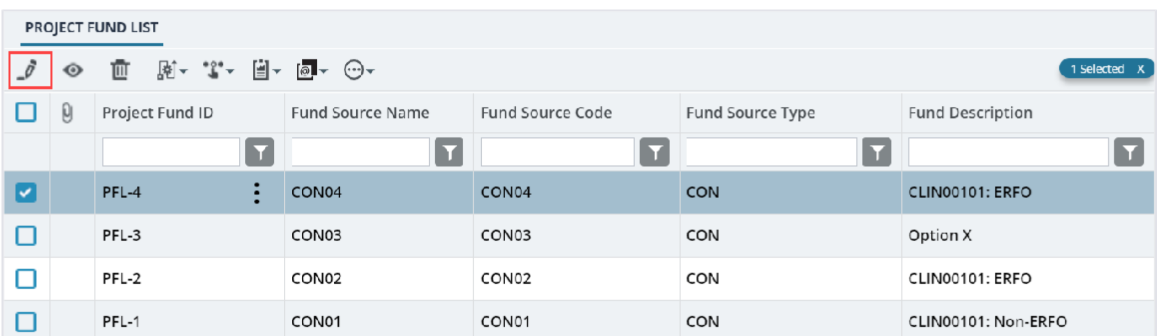


Figure 39: Edit

4. Make changes required.

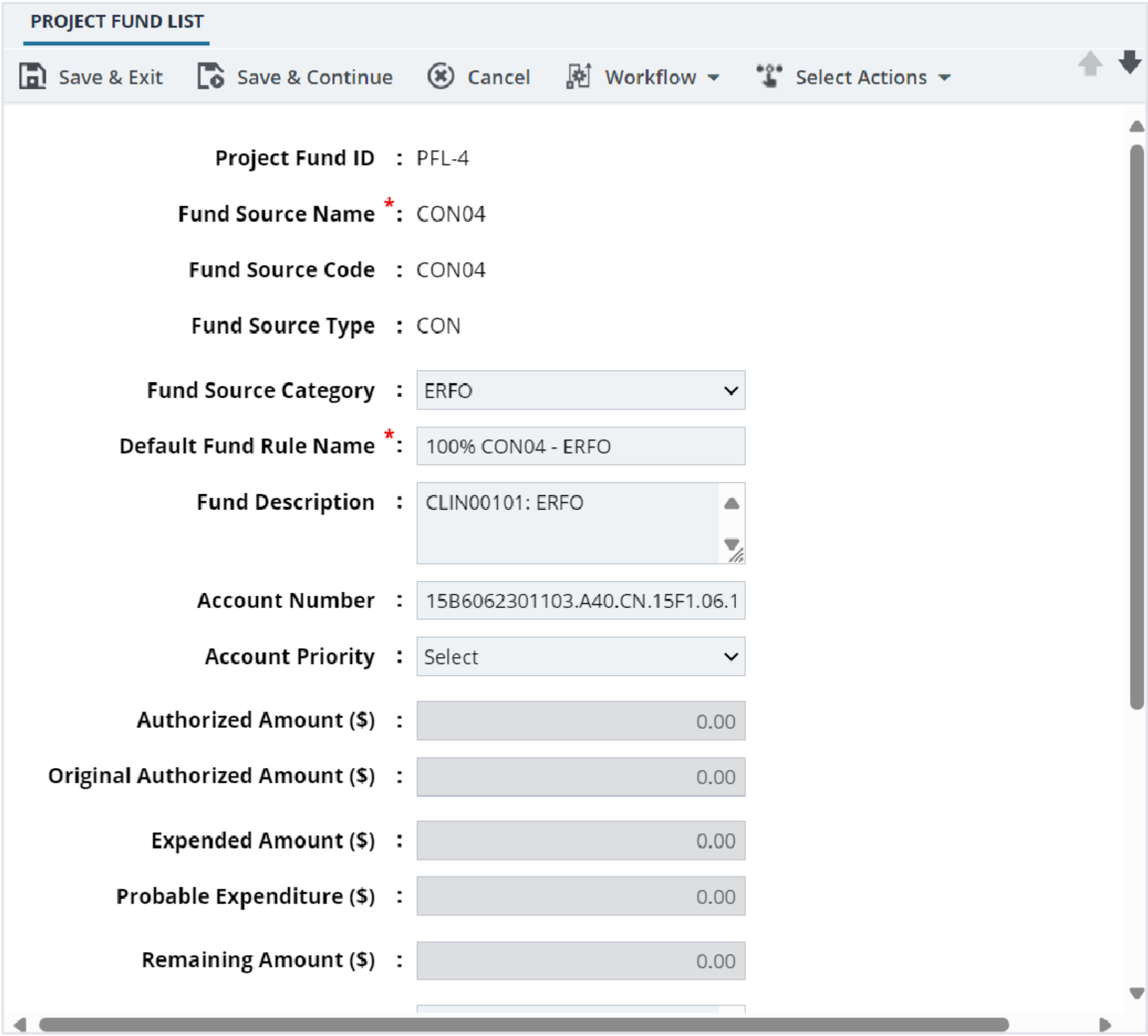


Figure 40: Edit the Record

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

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

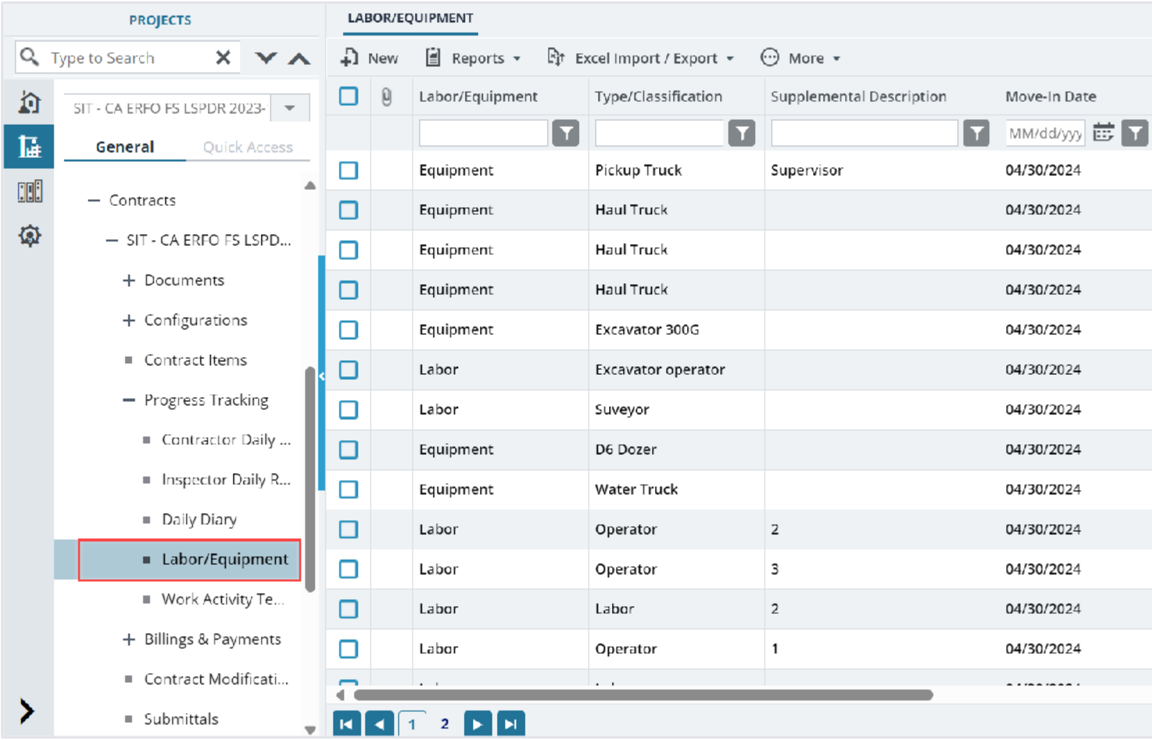


Figure 41: List Page

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

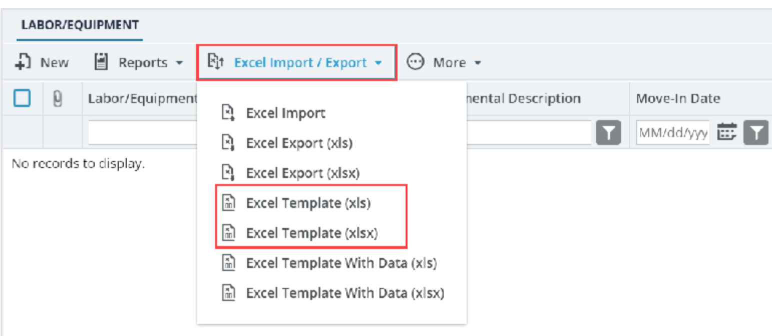


Figure 42: Excel Import /Export

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**.

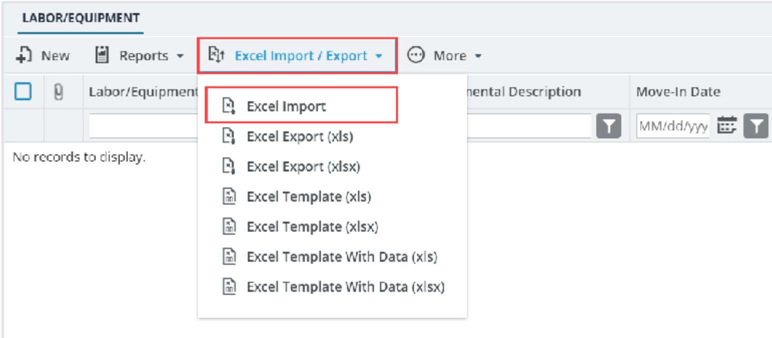


Figure 43: Excel Import

The **Import Details from Excel File** page is displayed.

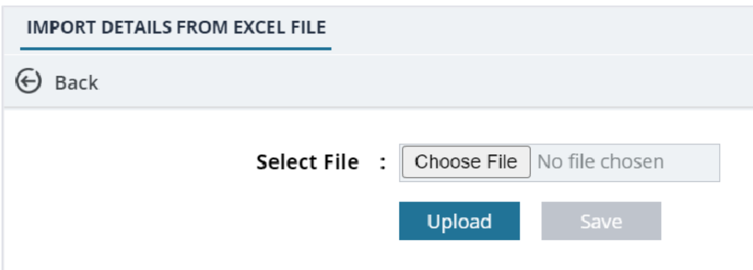


Figure 44: Import Details from Excel File

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

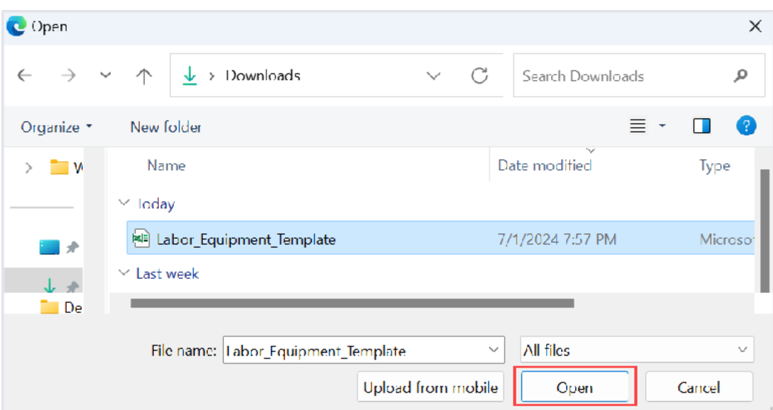


Figure 45: File to Upload

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

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

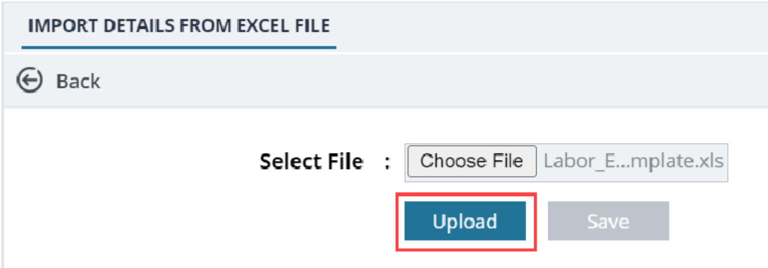


Figure 46: Upload the Excel

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**.

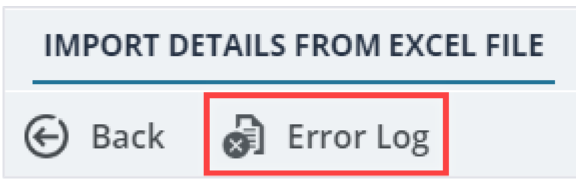
    

    Figure 47: Error Log Option

    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

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

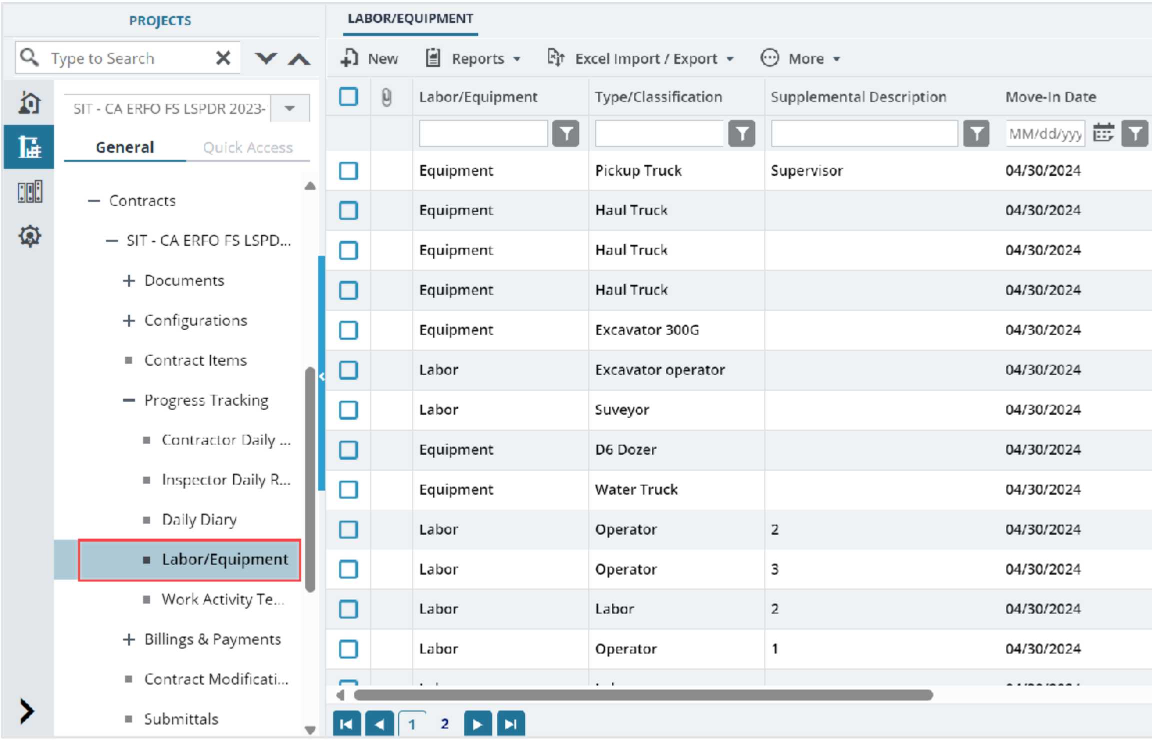


Figure 48: List Page

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

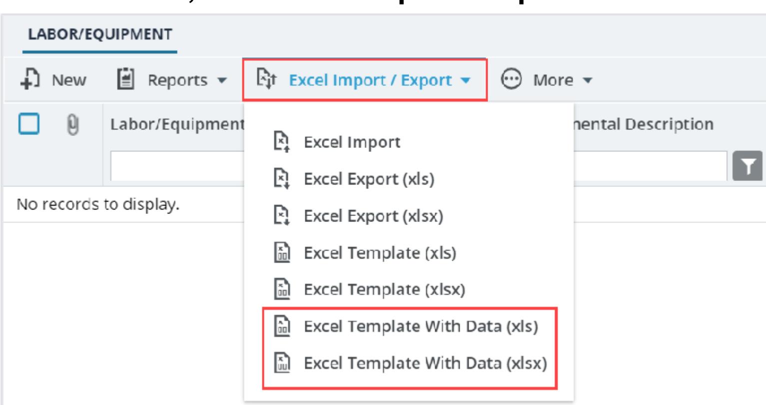


Figure 49: Excel Template with Data

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**.

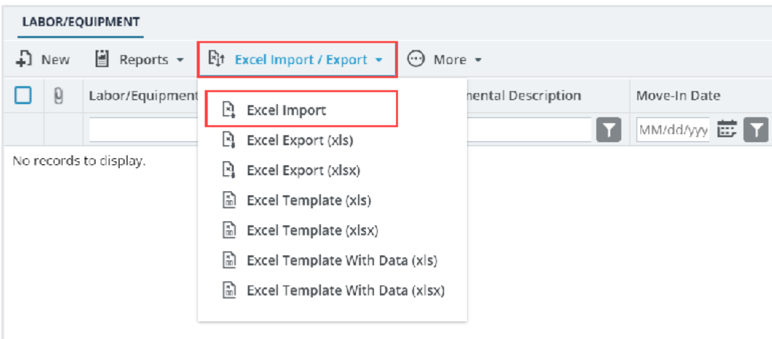


Figure 50: Excel Import

The **Import Details from Excel File** page is displayed.

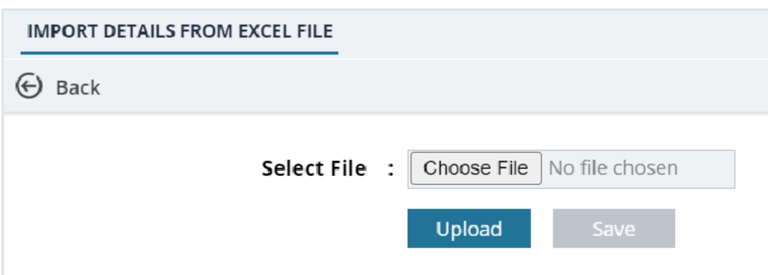


Figure 51: Import Details from Excel File

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**.

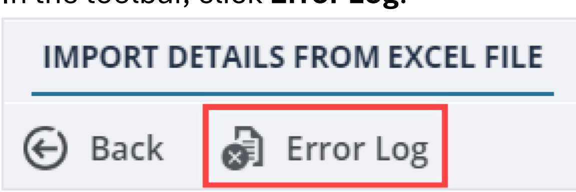


Figure 52: Error Log Option

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.

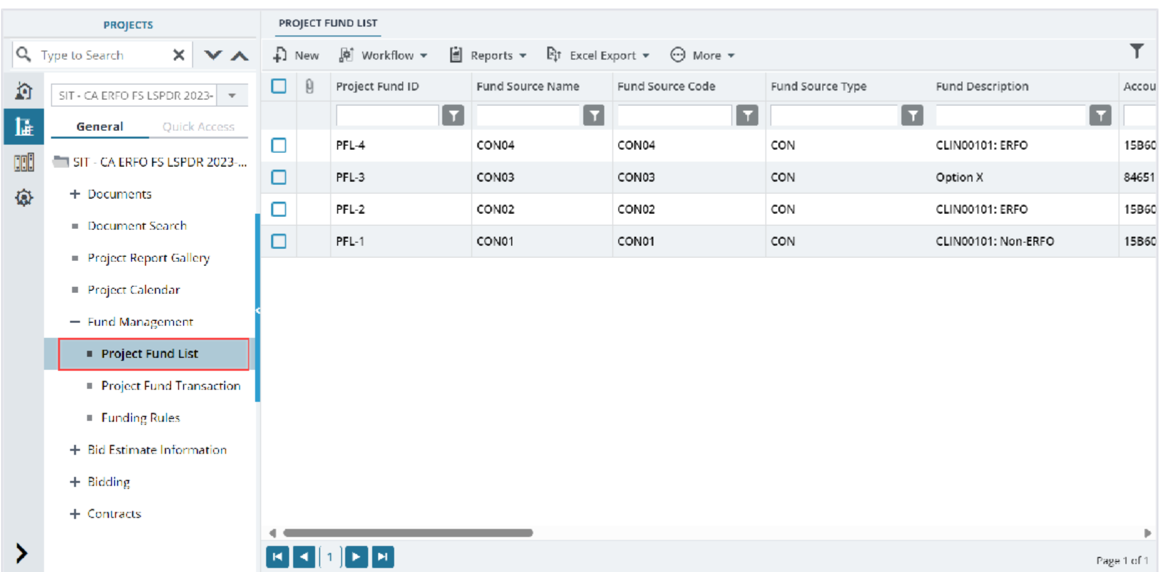


Figure 53: List Page

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

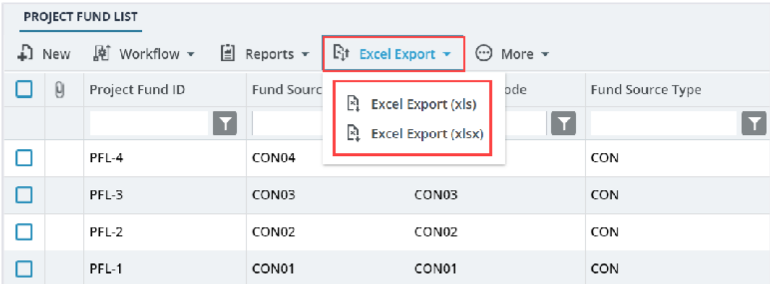


Figure 54: Excel Export

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.

   The list page of the selected form is displayed.

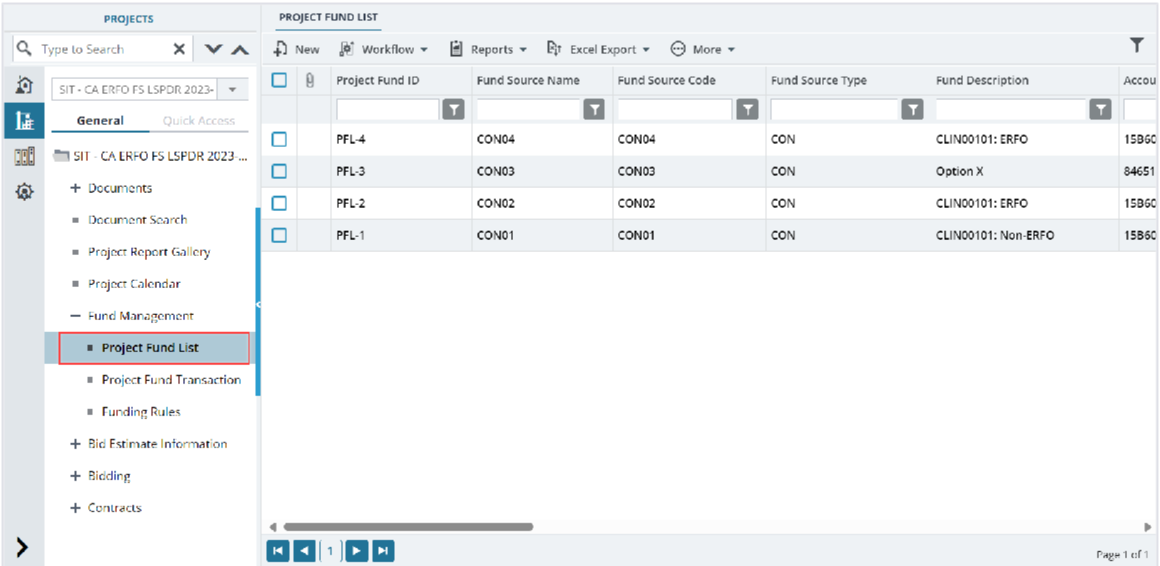


Figure 55: List Page

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

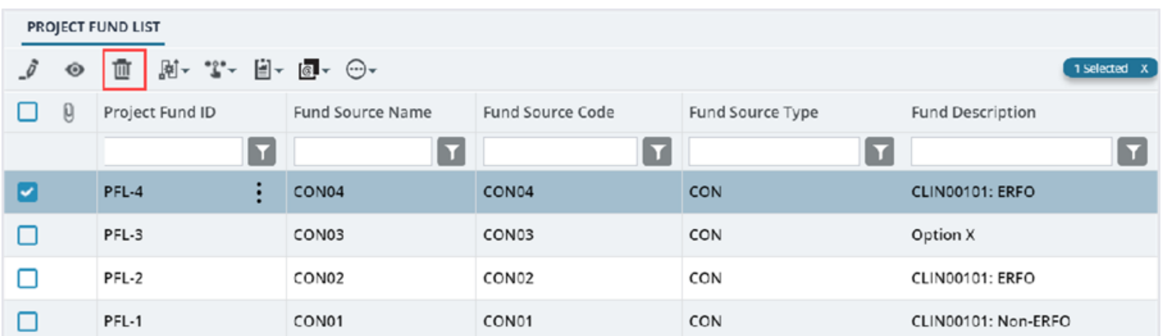


Figure 56: Delete Option

4. The delete confirmation message is displayed.

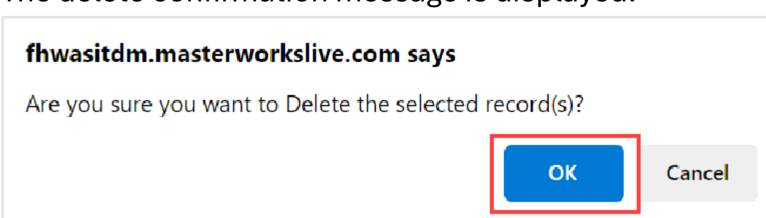


Figure 57: Confirmation message

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**.

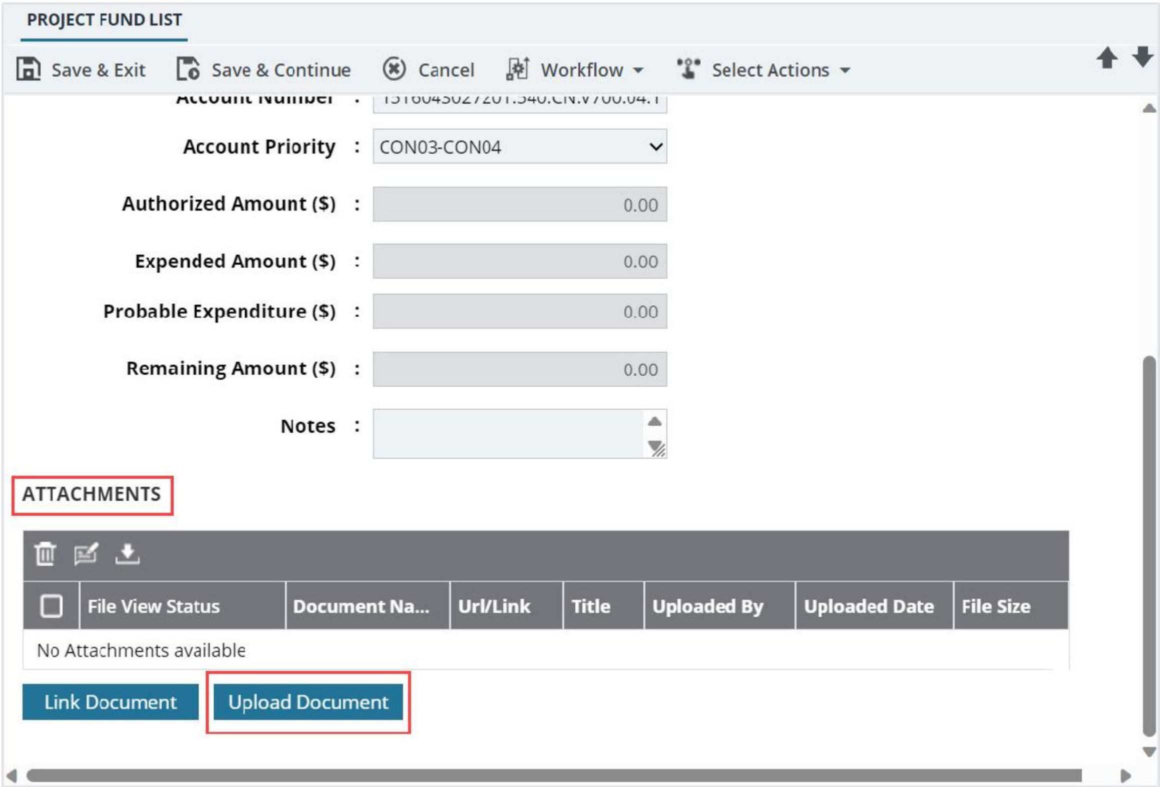


Figure 58: Using Upload Document Option

The **Open** dialog box is displayed.

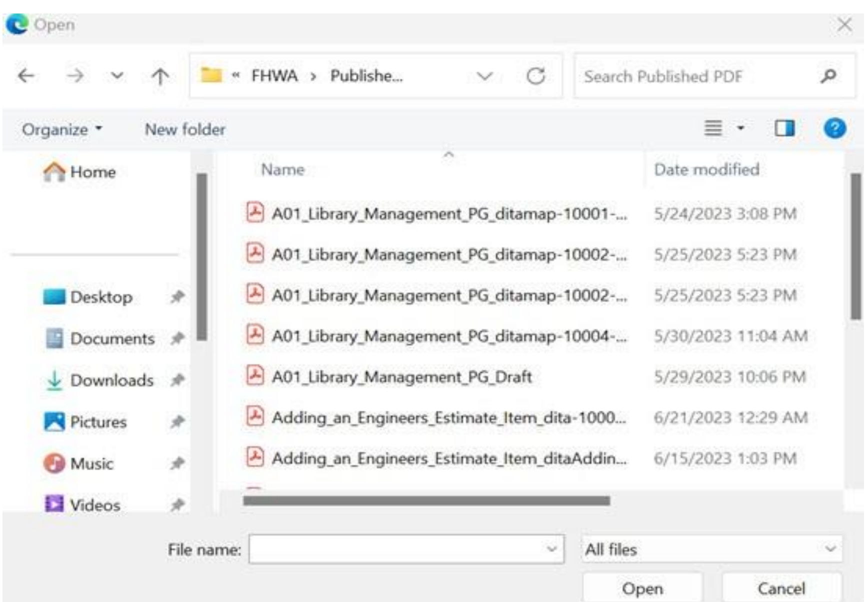


Figure 59: Open Dialog Box

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**.

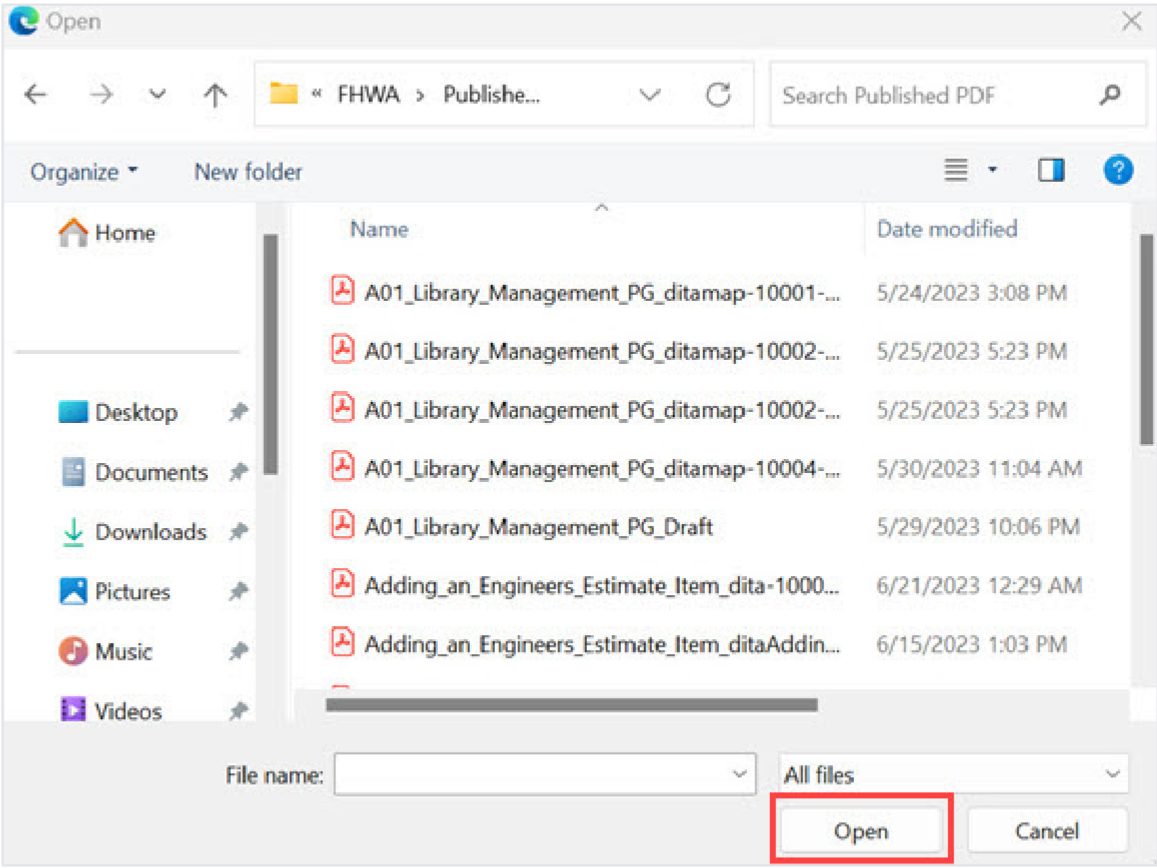


Figure 60: Open Option

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.

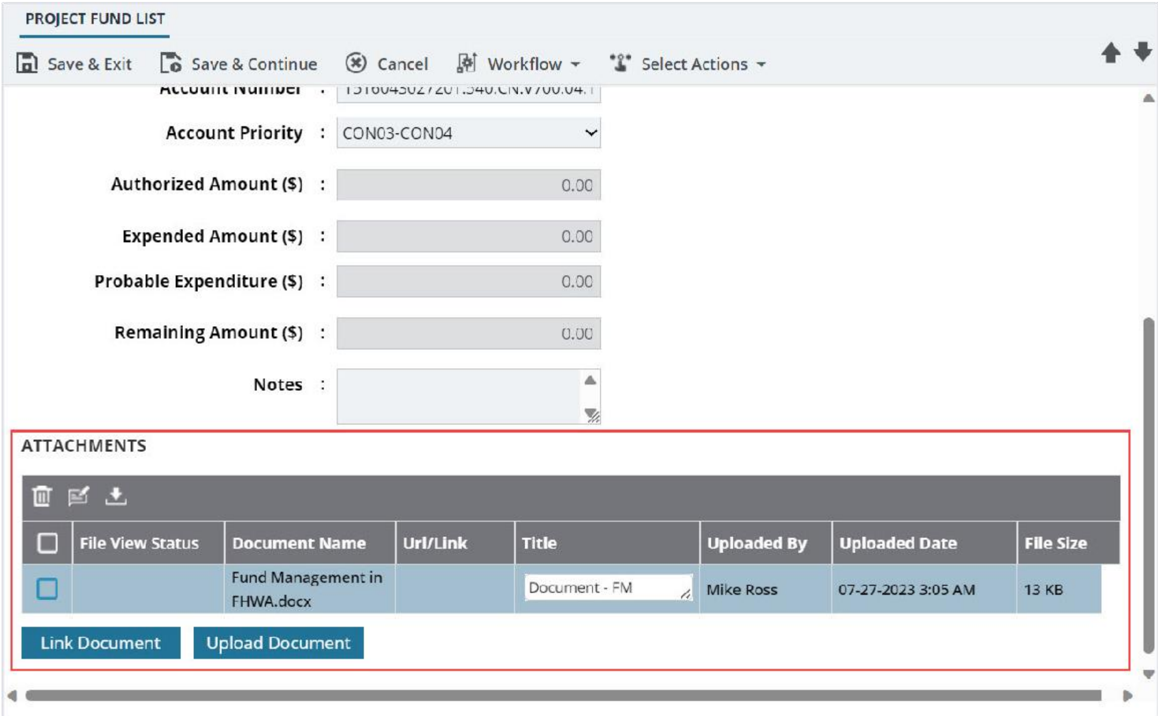


Figure 61: Uploaded File

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**.

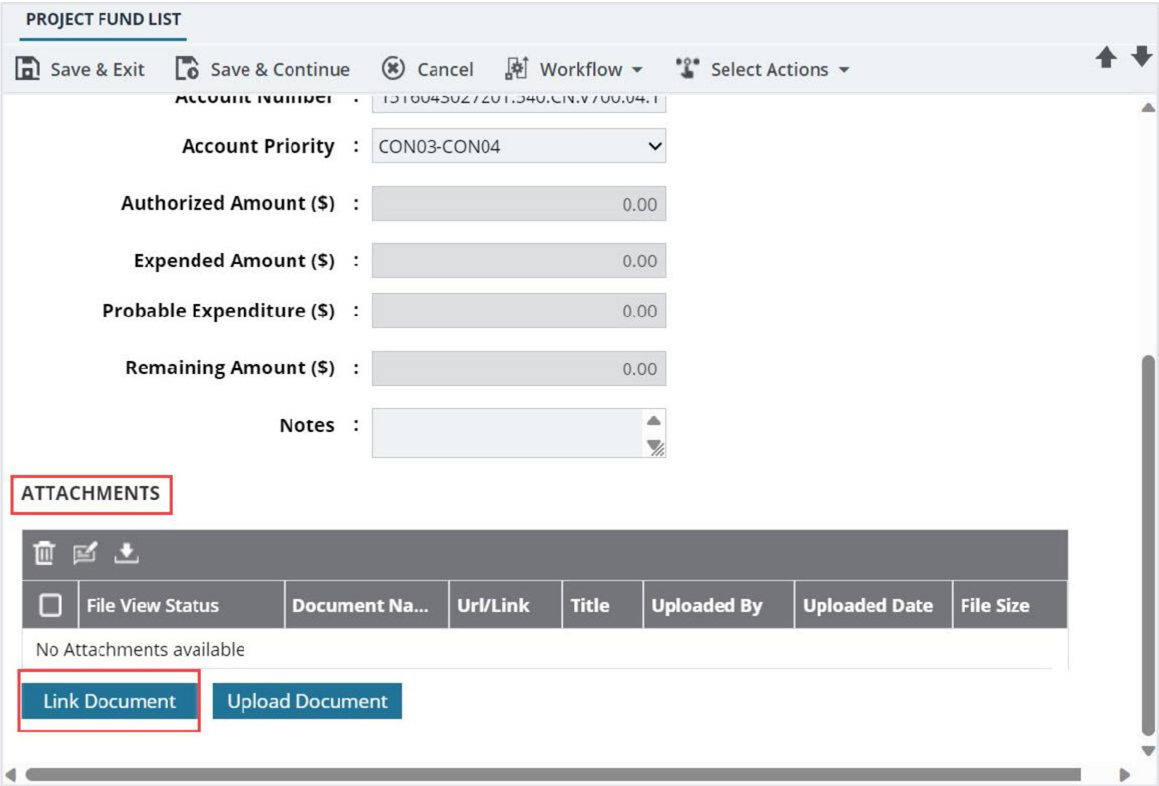


Figure 62: Using Link Document Option

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

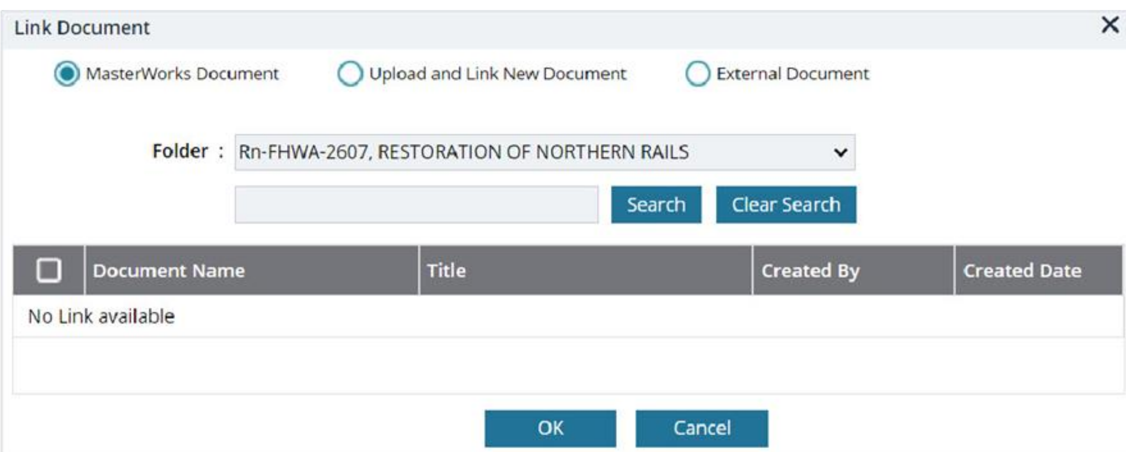


Figure 63: Link Document Dialog Box

2. Click **Masterworks Document**.

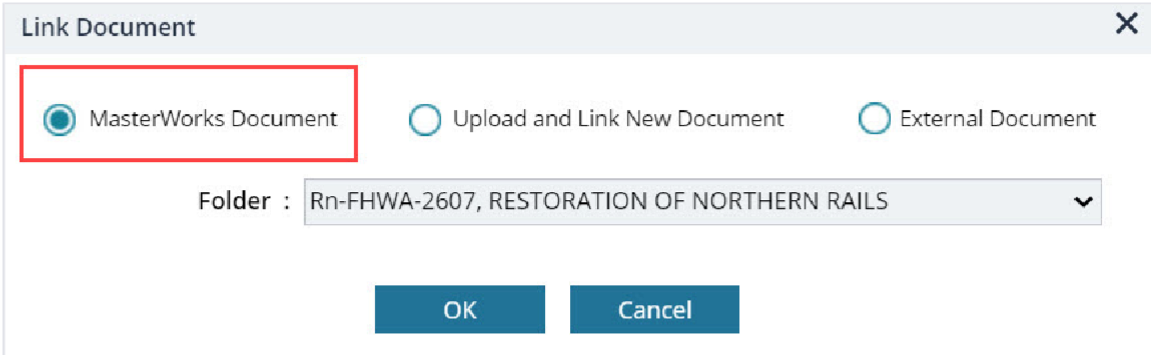


Figure 64: Using Masterworks Document Option

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.

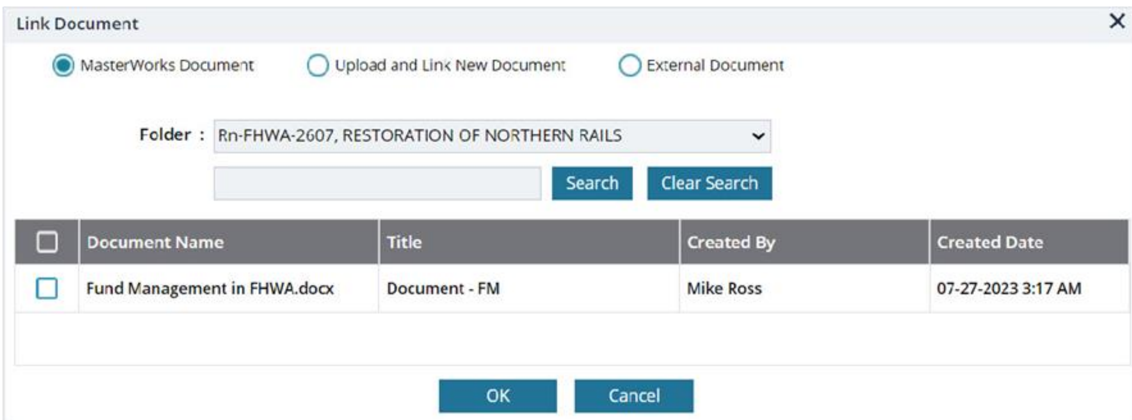


Figure 65: List of Documents

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.

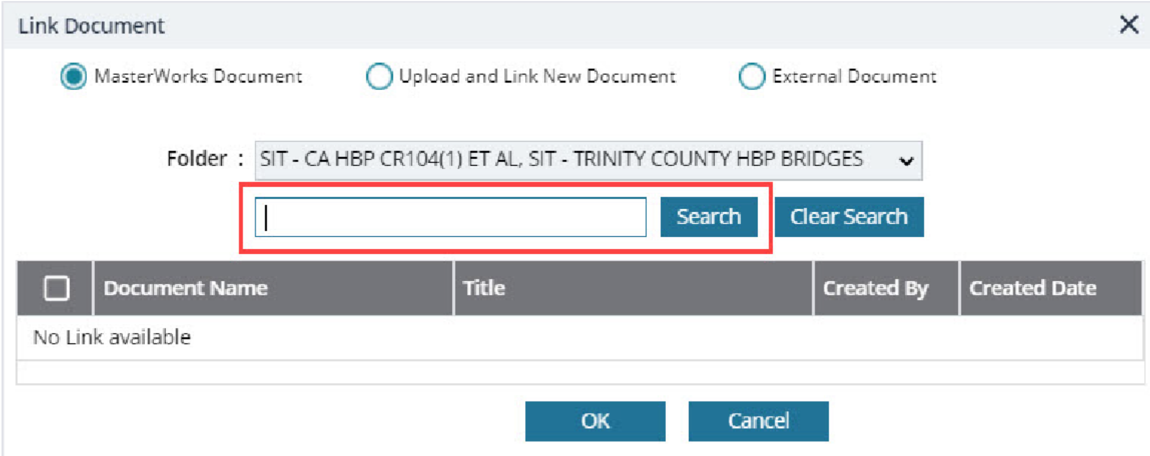


Figure 66: Using Search Option

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.

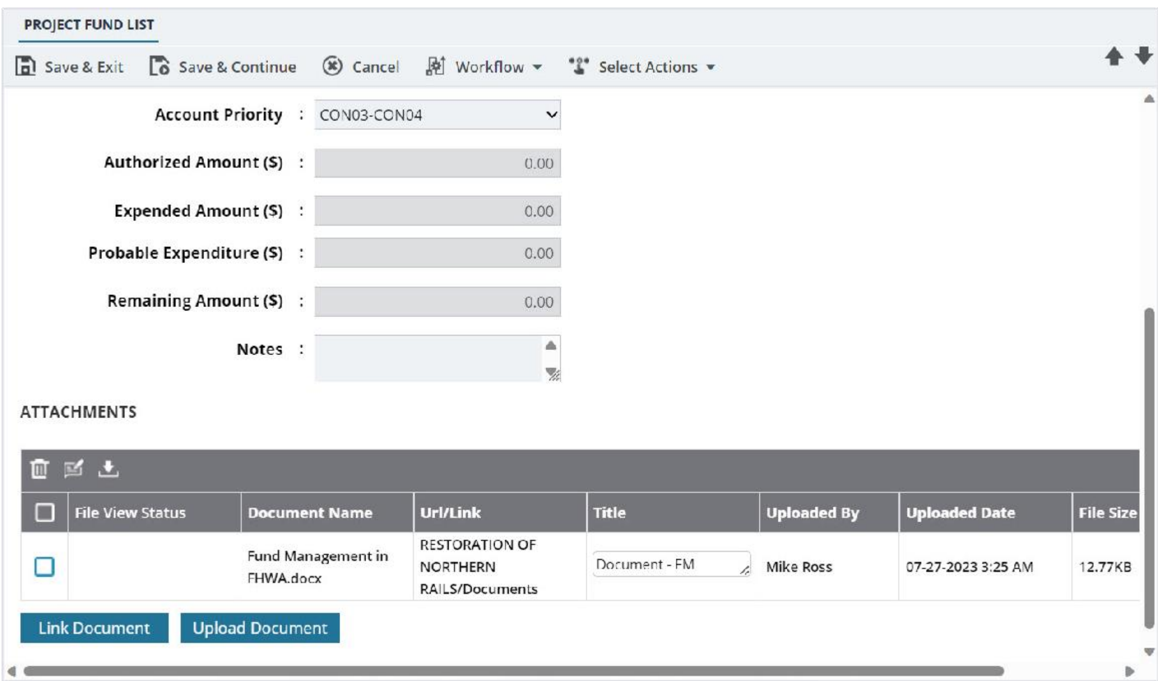


Figure 67: Linked Document

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**.

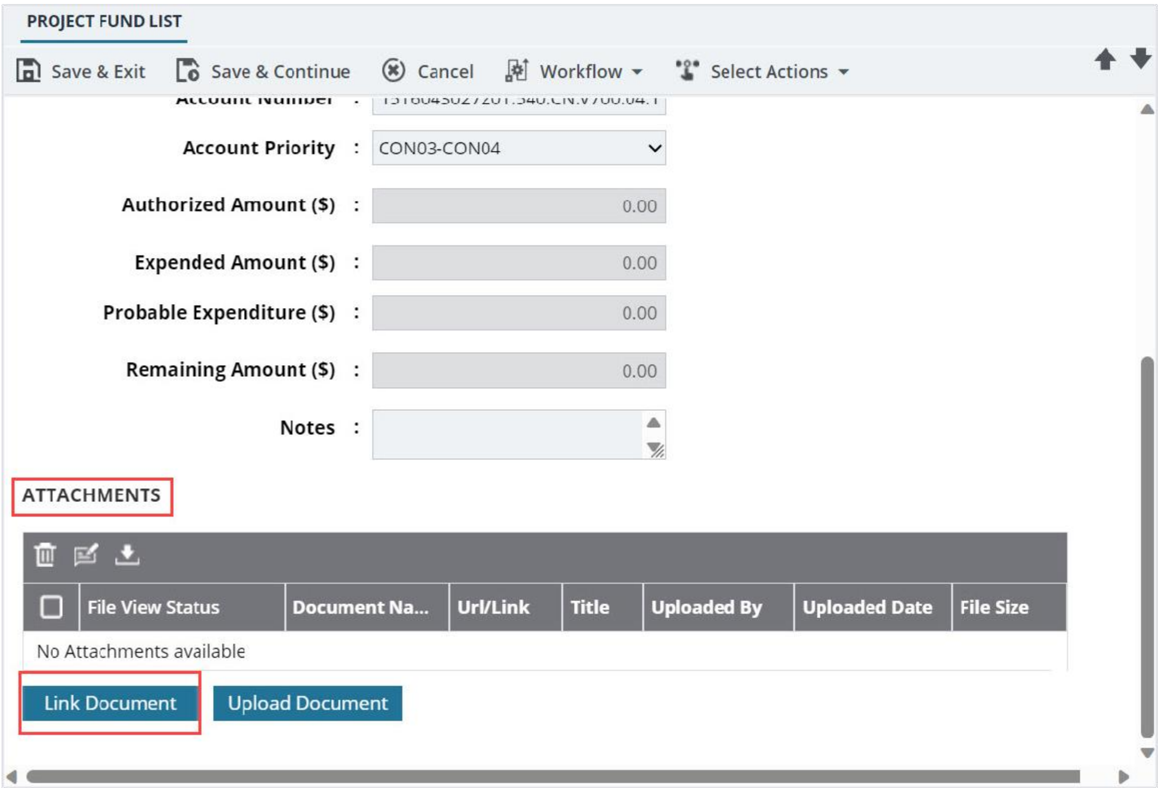


Figure 68: Using Link Document Option

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

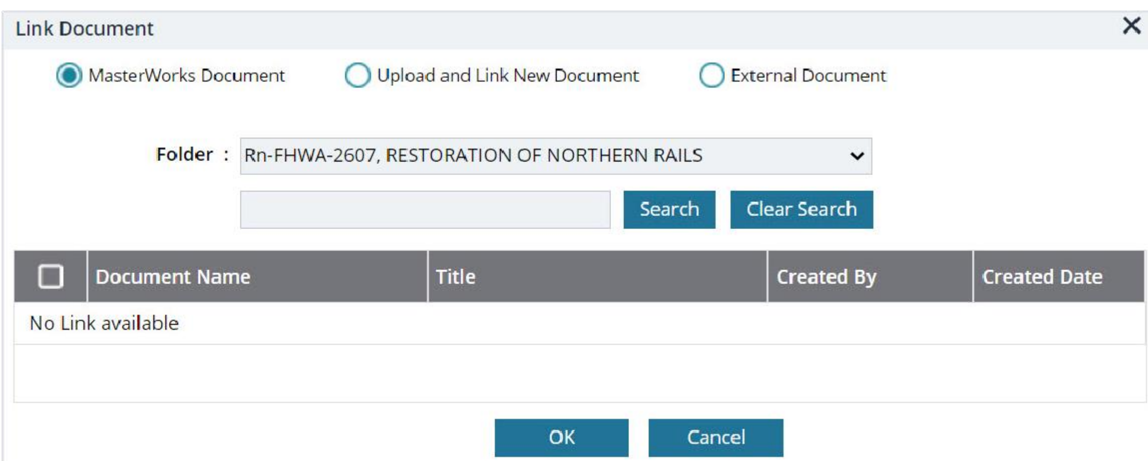


Figure 69: Link Document Dialog Box

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

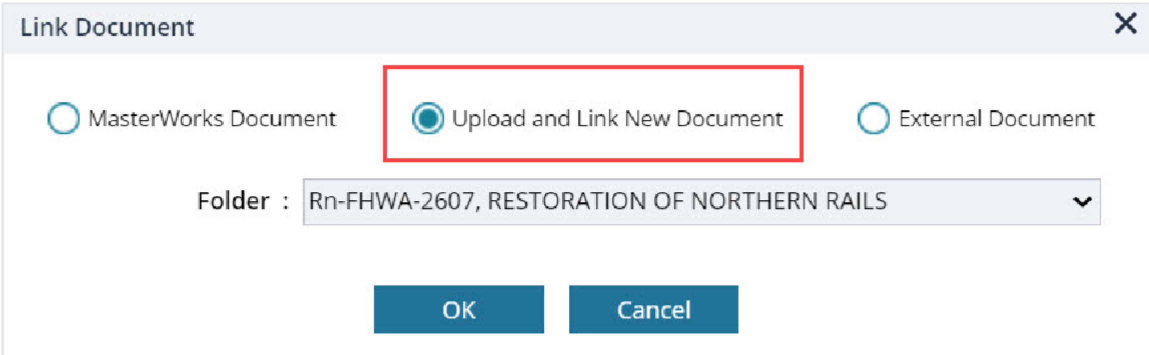


Figure 70: Using Upload and Link New Document Option

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.

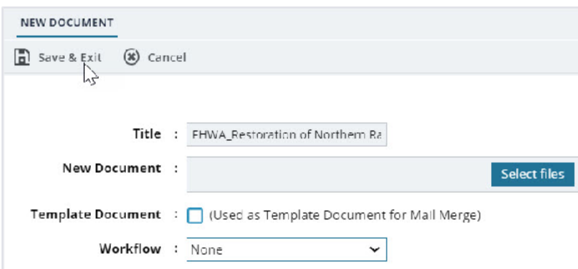


Figure 71: New Document Page

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**.

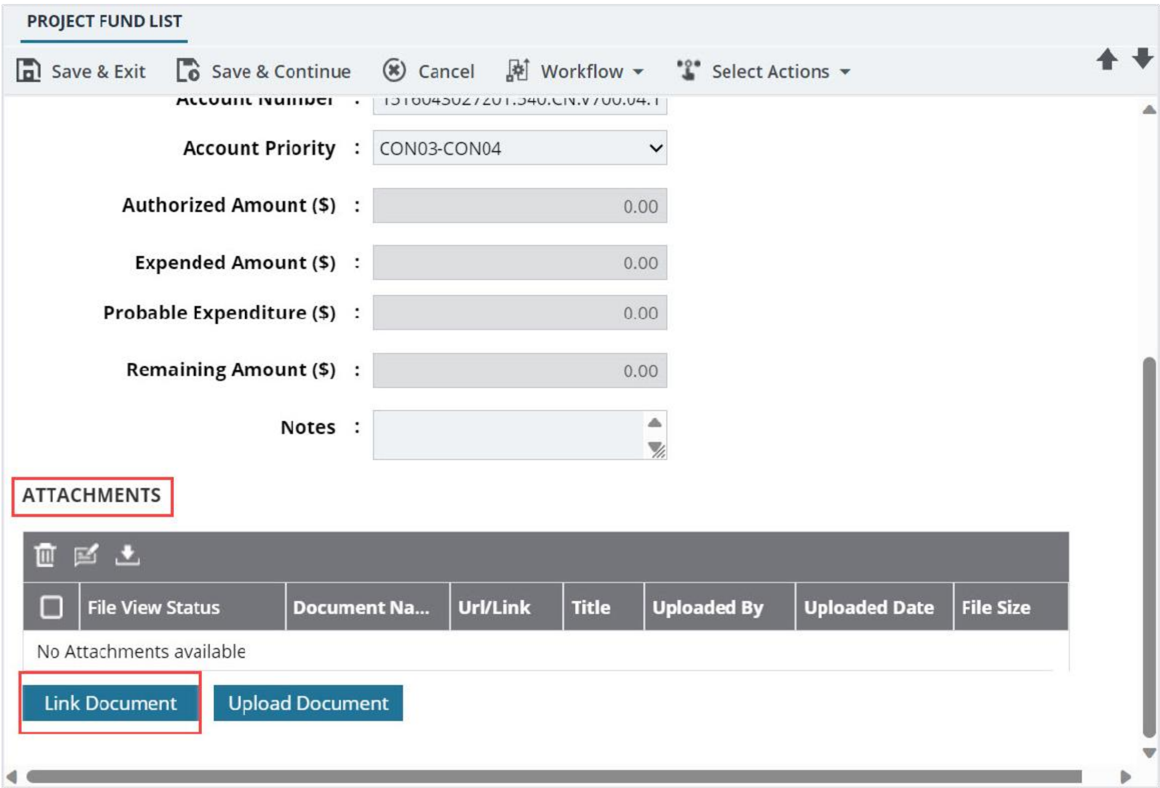


Figure 72: Using Link Document Option

2. Click **External Document**.

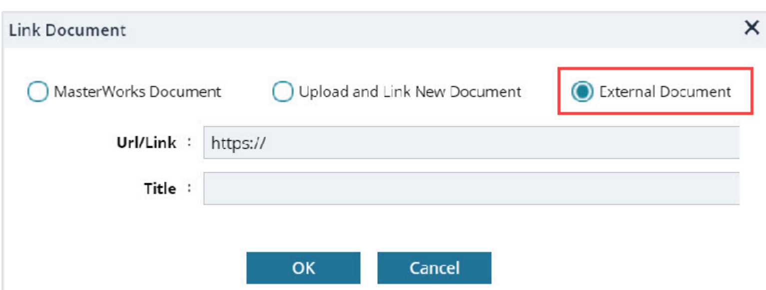


Figure 73: Using External Document Option

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.

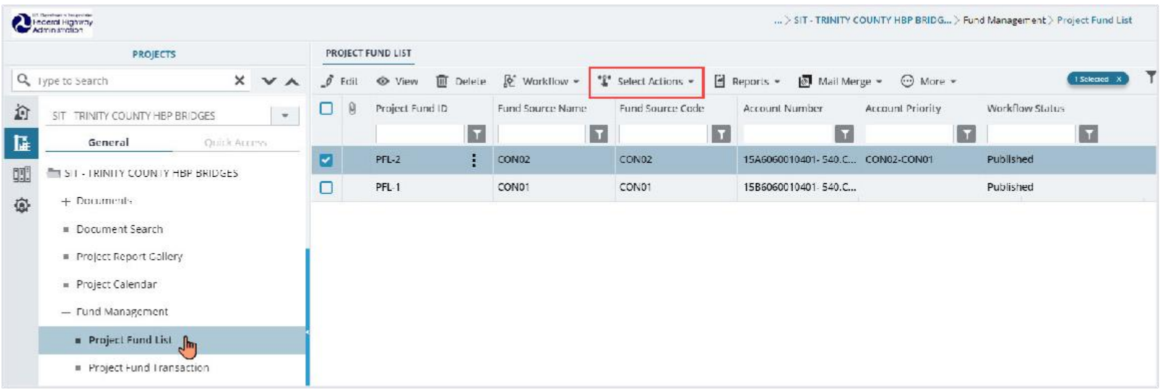
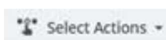


Figure 74: Using Select Actions Option

2. Click **Select Actions** 

and then click the appropriate workflow action. The Masterworks dialog box is displayed.

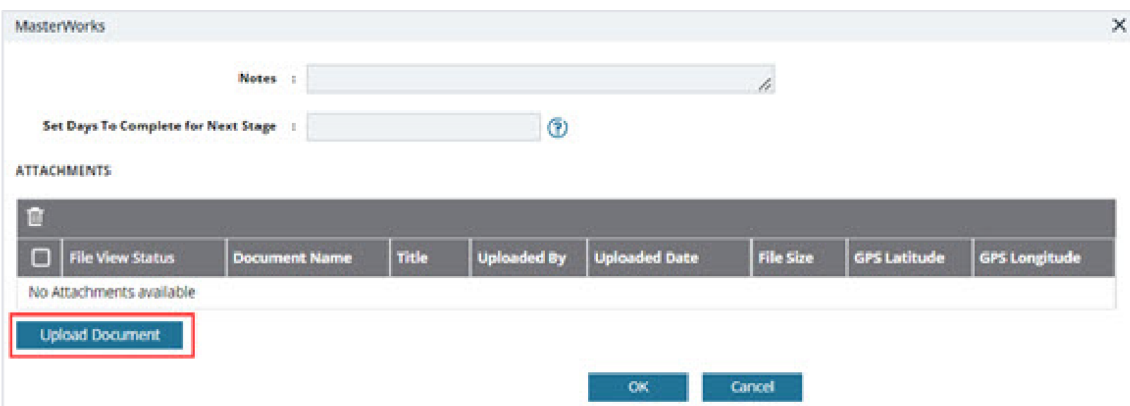


Figure 75: Masterworks Dialog Box

3. In the **Attachments** section, click **Upload Document**.
   The **Open** dialog box is displayed.

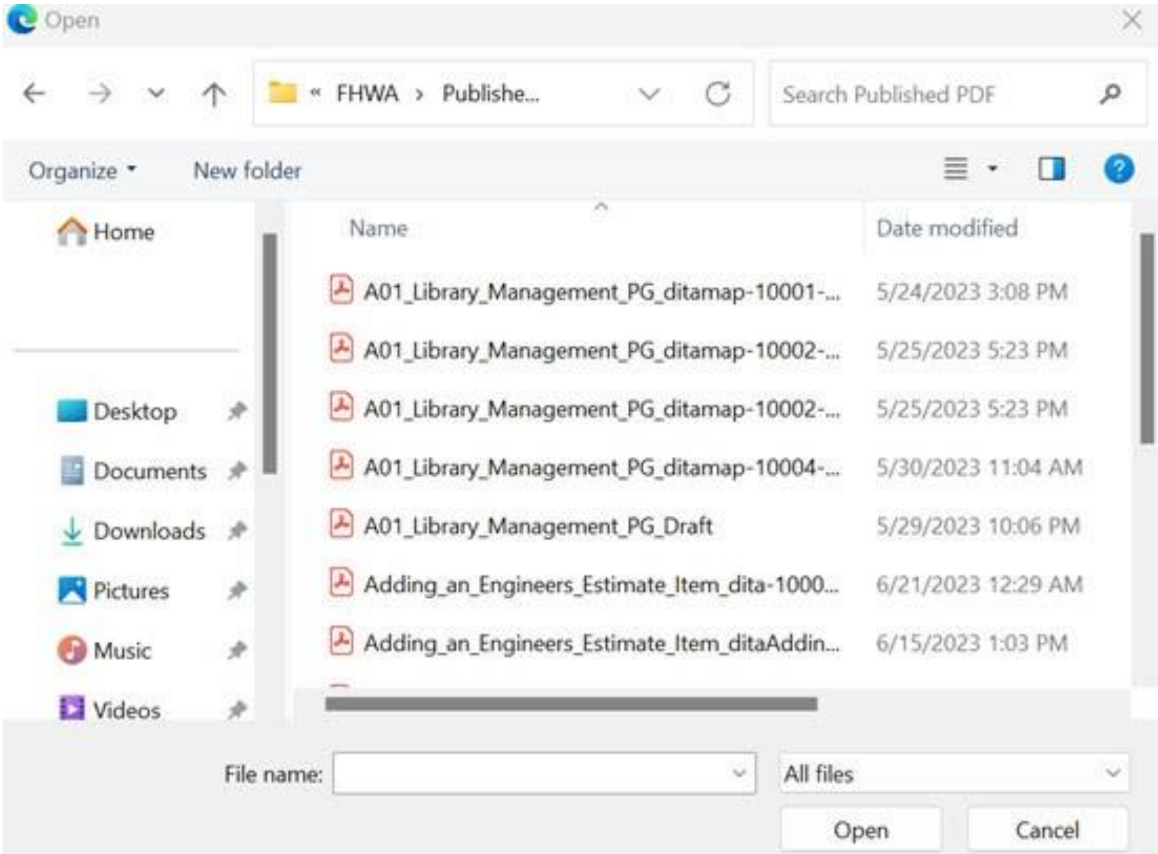


Figure 76: Open Dialog Box

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**.

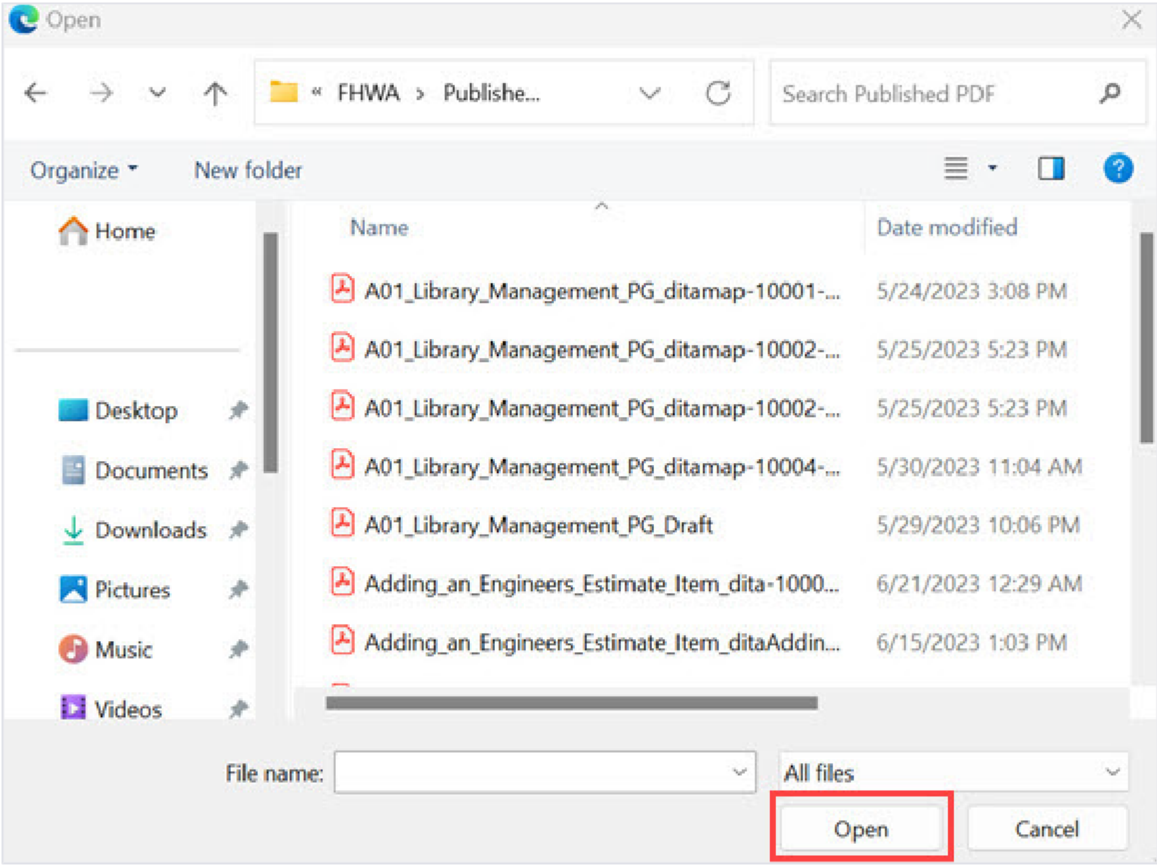


Figure 77: Using Open Option

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.

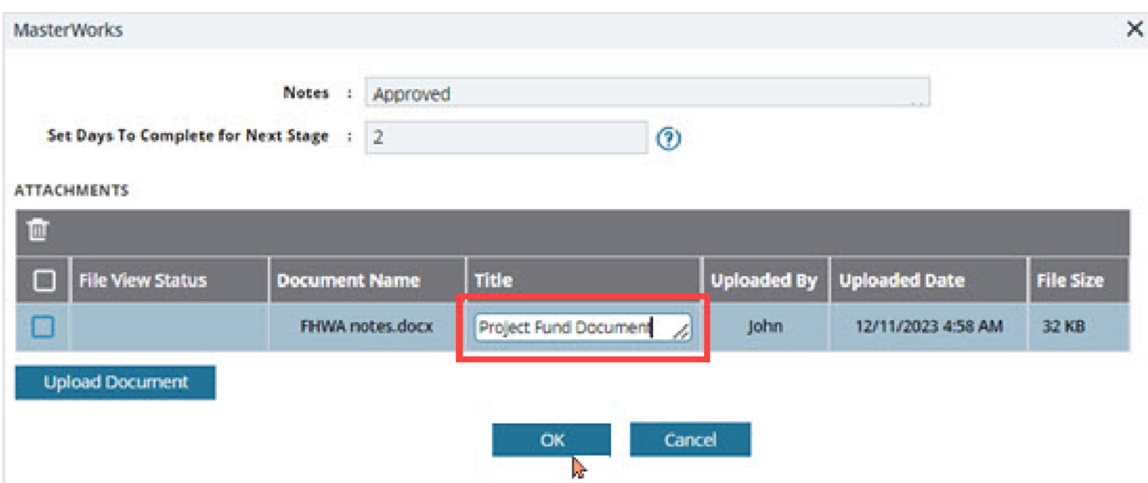


Figure 78: Updating Title for the Attached File

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

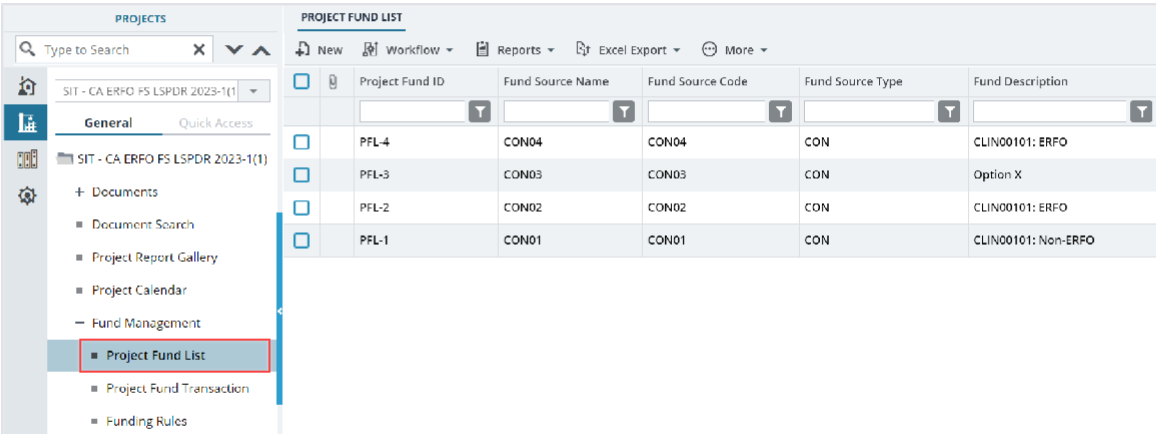


Figure 79: Project Fund List Page

The form list page is displayed.

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

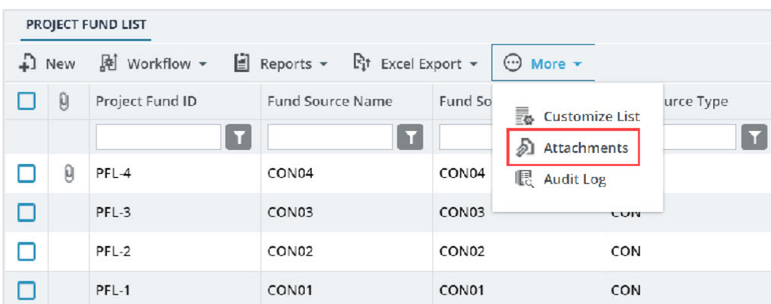


Figure 80: Using Attachments Option

The attachments of all the records are listed.

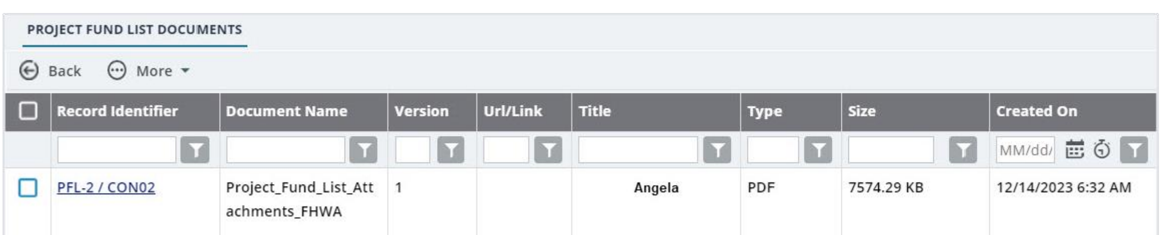


Figure 81: List of Attachments

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

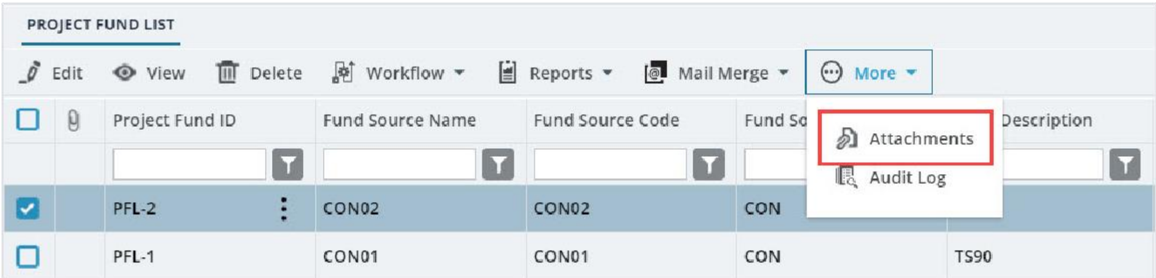


Figure 82: Viewing Files Attached to a Record

- 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.

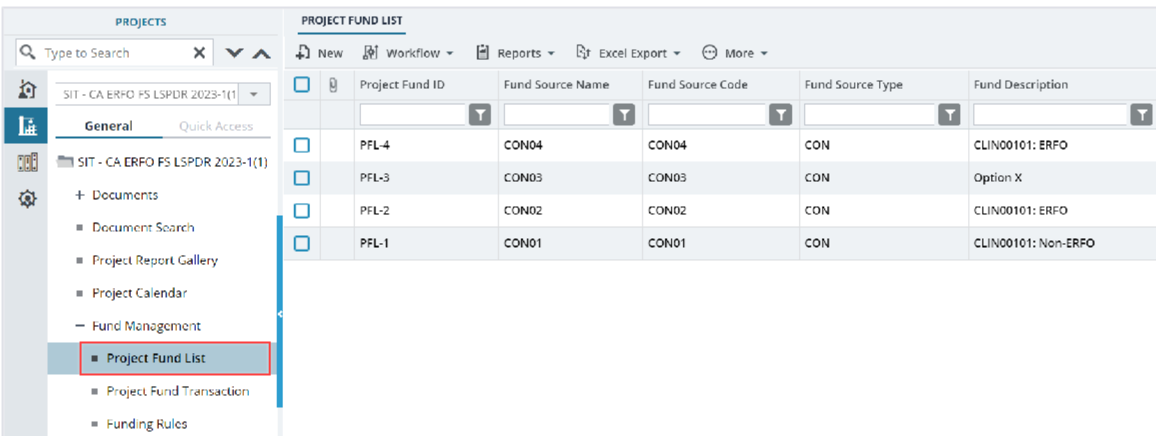


Figure 83: Project Fund List Page

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

Figure 84: Using View Option

The form details page is displayed.

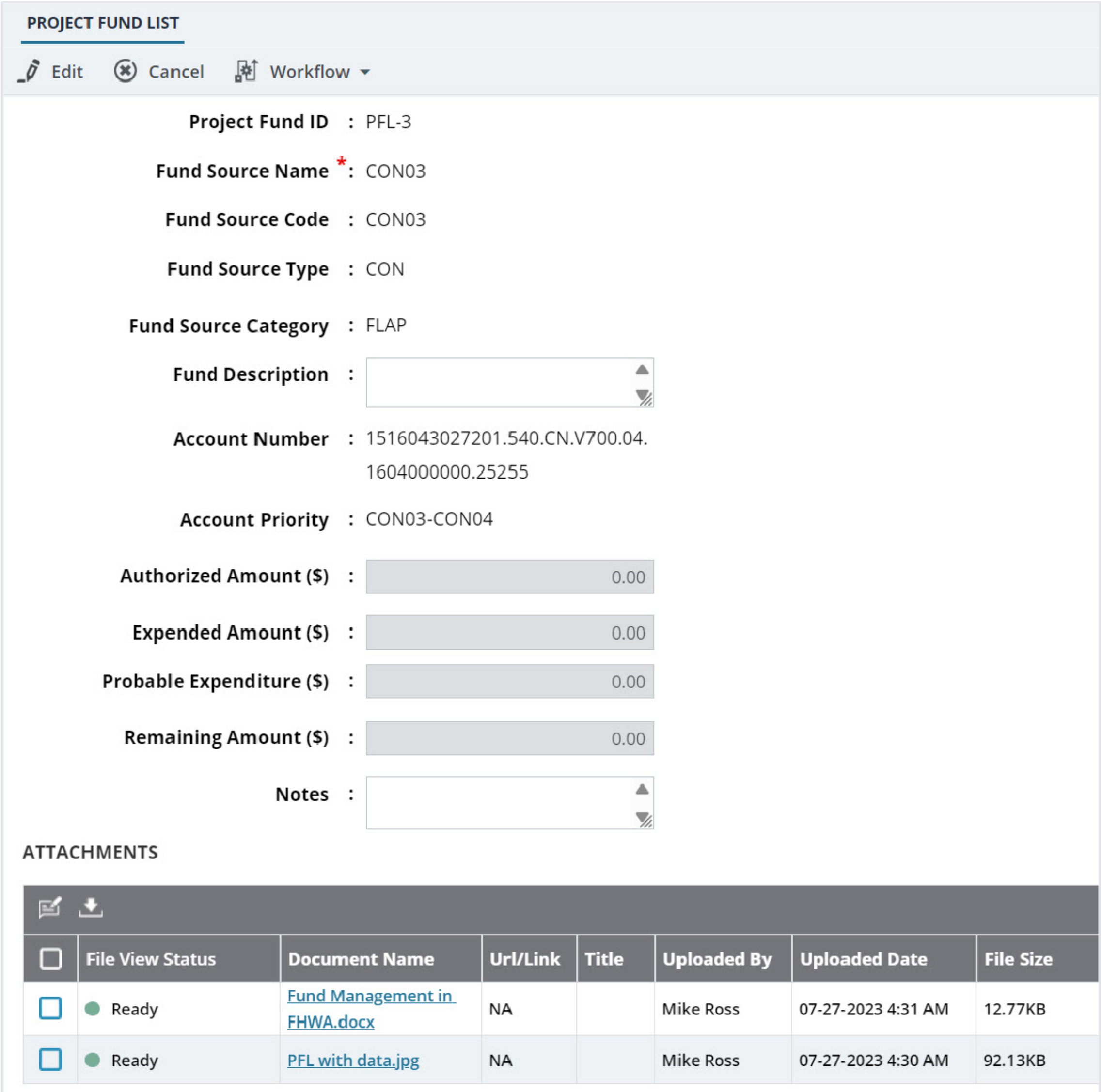


Figure 85: Project Fund List Page in View Mode

3. In the **Attachments** section, select the appropriate files, and then click .

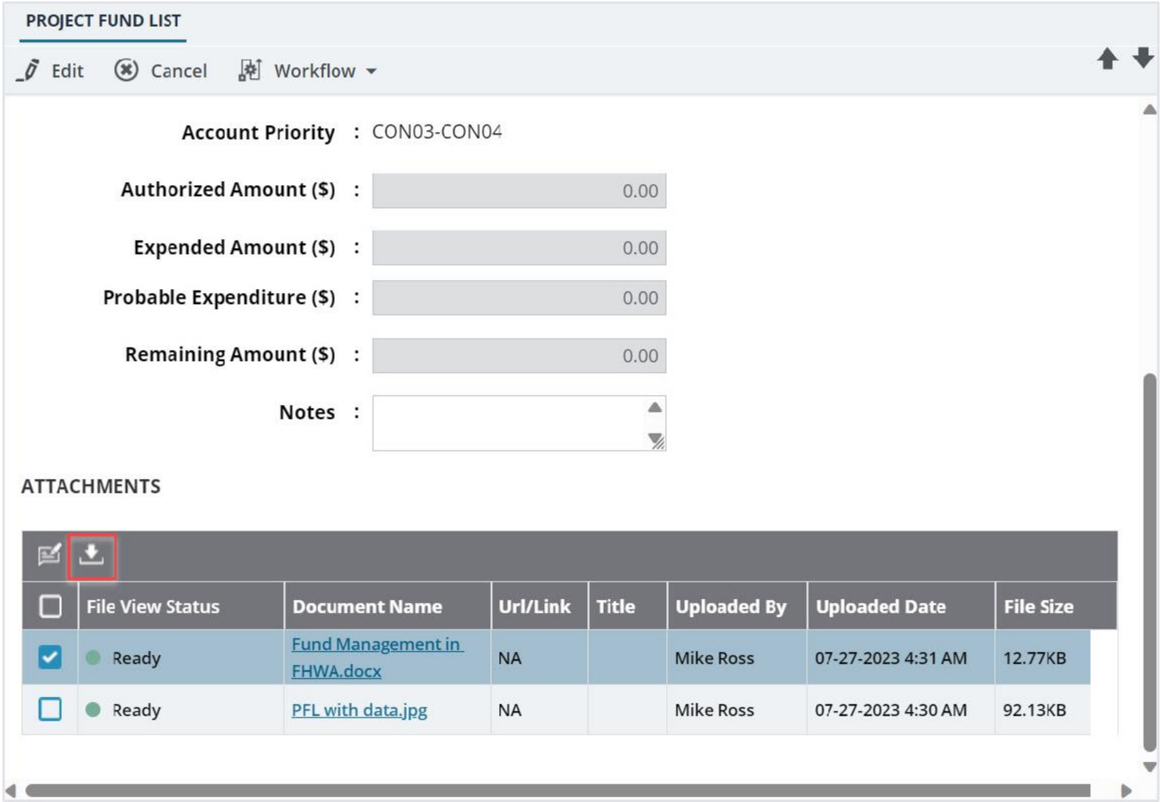


Figure 86: Using Download Option

- To access and download files attached to a workflow:

1. In the navigation pane, click the appropriate form.

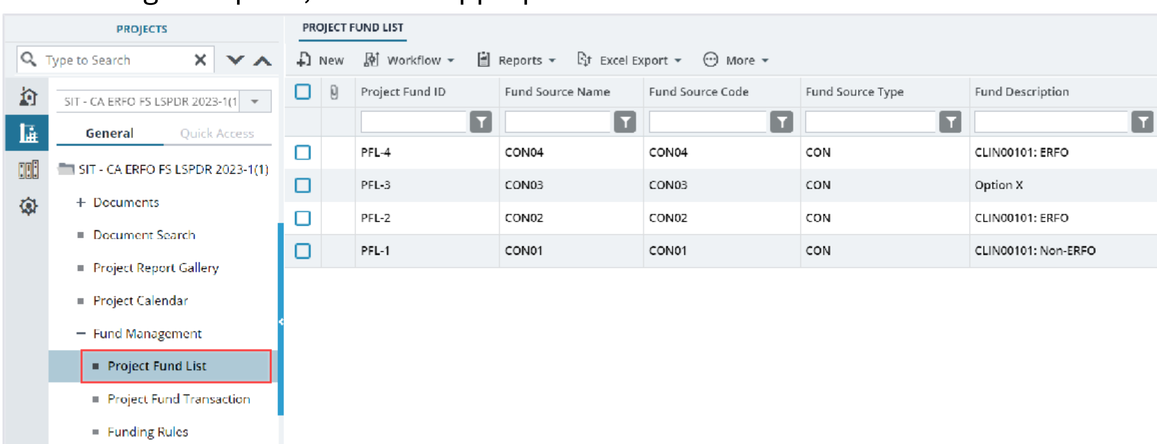


Figure 87: Project Fund List Page

The form list page is displayed.

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

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

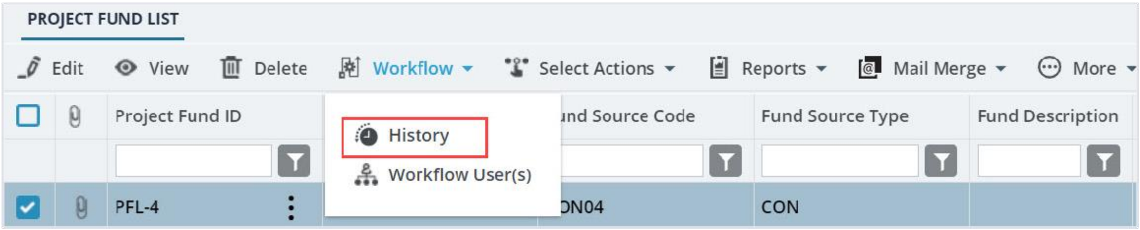


Figure 88: Using History Option

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

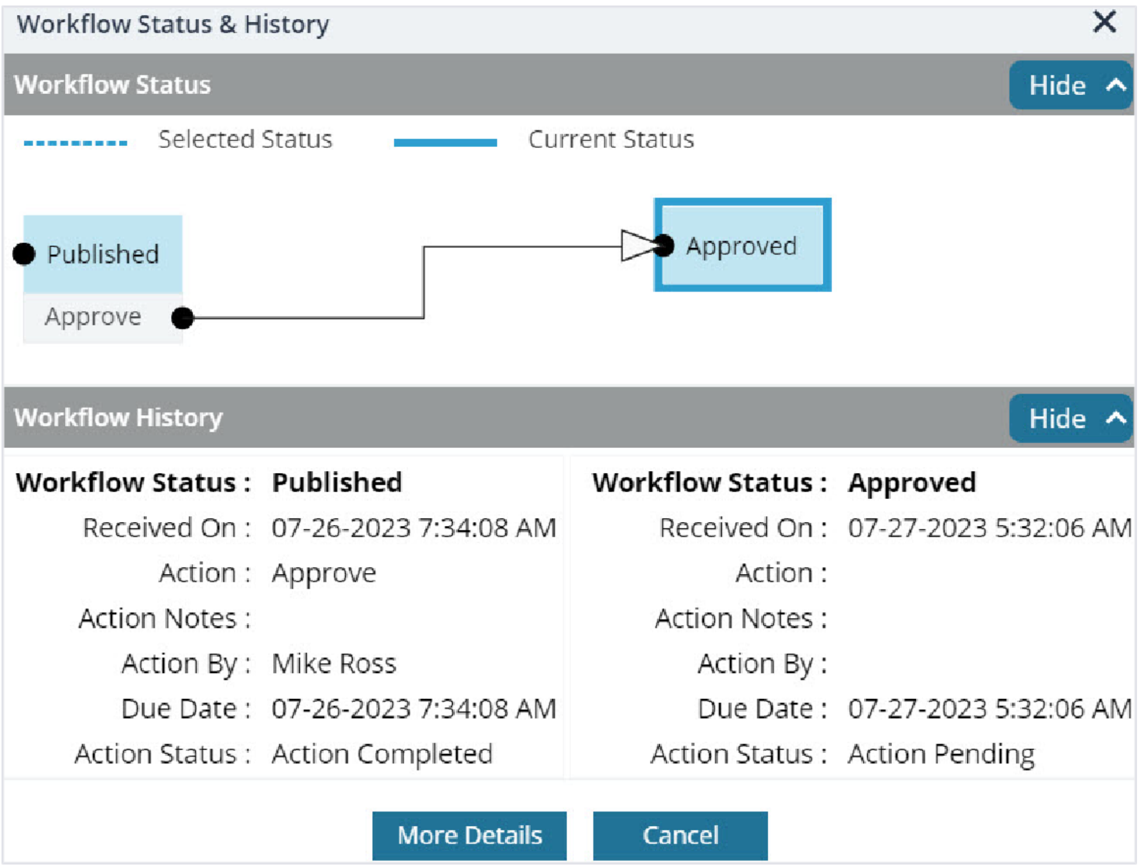


Figure 89: Workflow Status & History Dialog Box

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

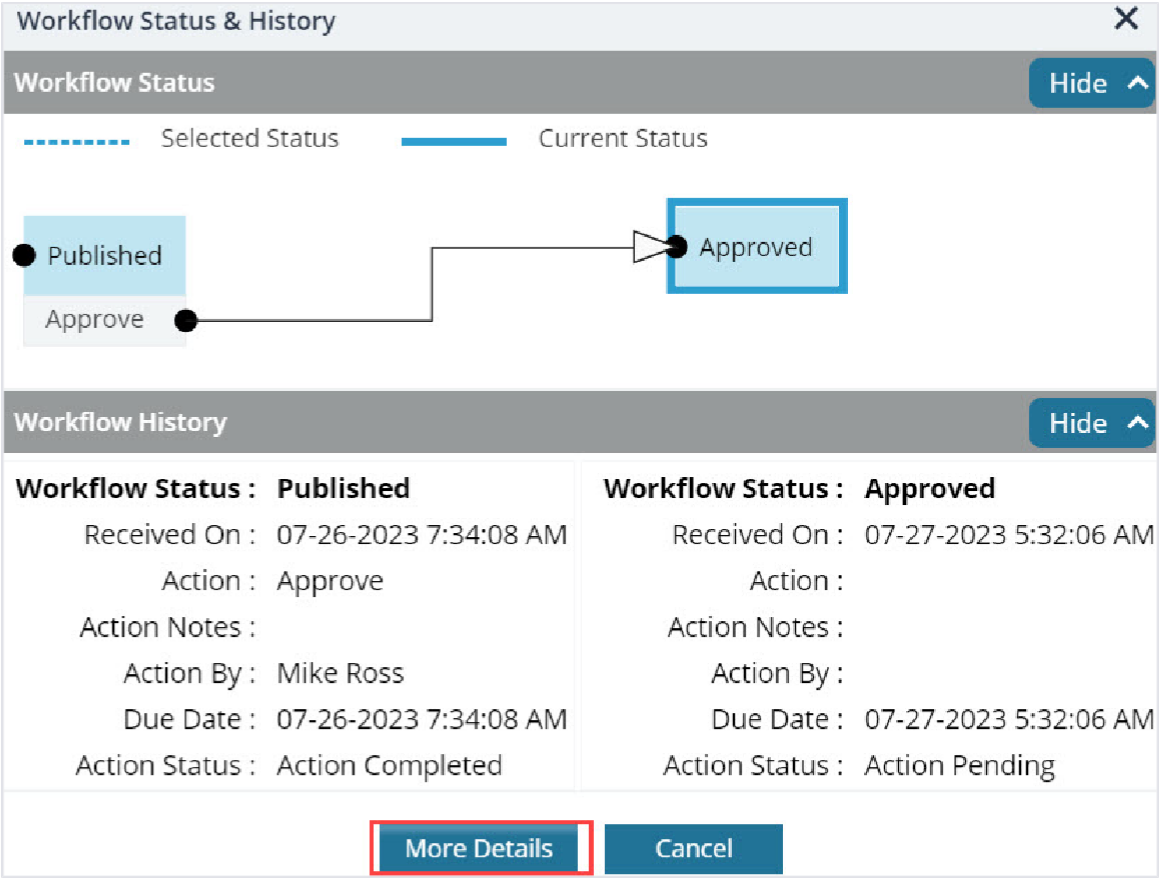


Figure 90: Using More Details Option

The **History** page is displayed.

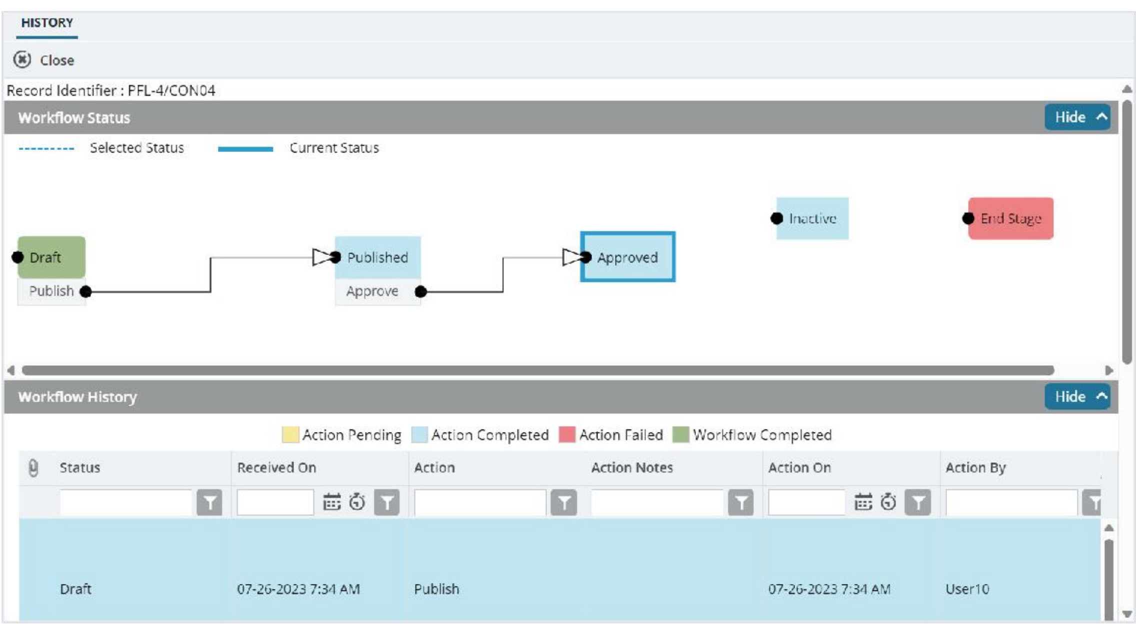


Figure 91: History Page

5. In the **Attachments** section, select the appropriate documents, and then click .

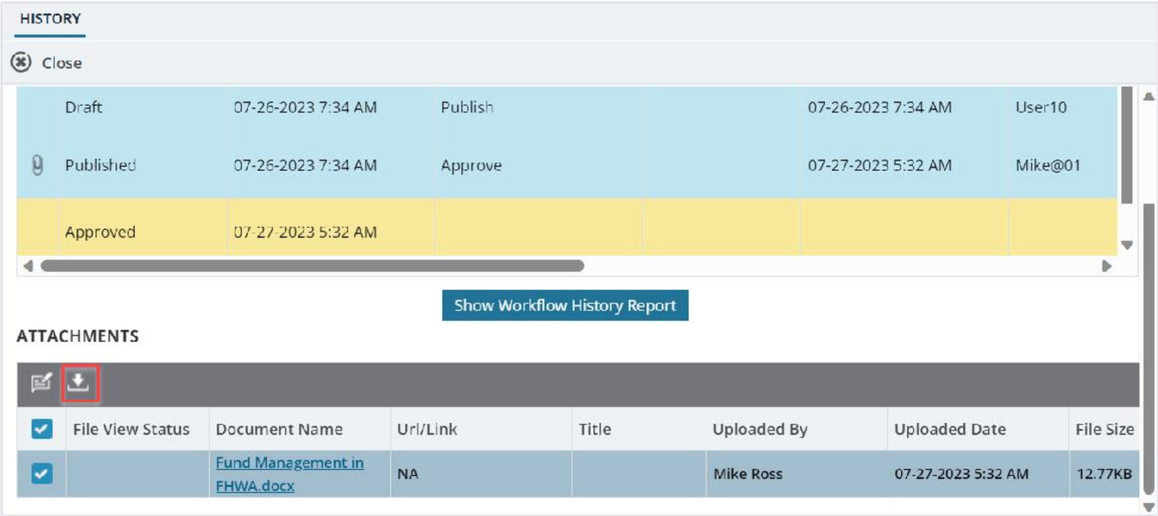


Figure 92: Using Download Option

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.

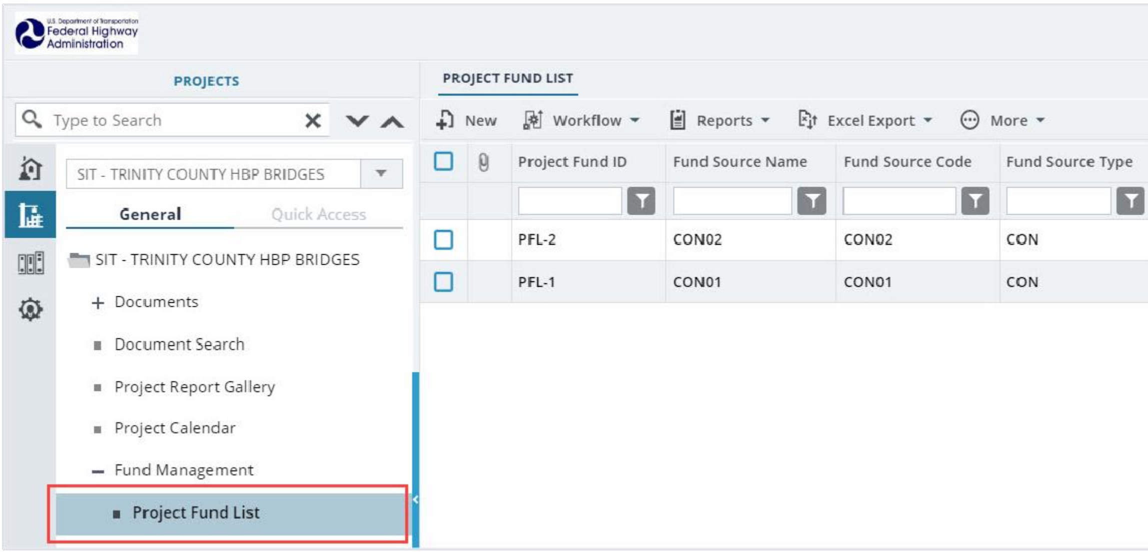


Figure 93: Project Fund List Page

   The form list page is displayed.

   b. Click **More**, and then click **Attachments**.

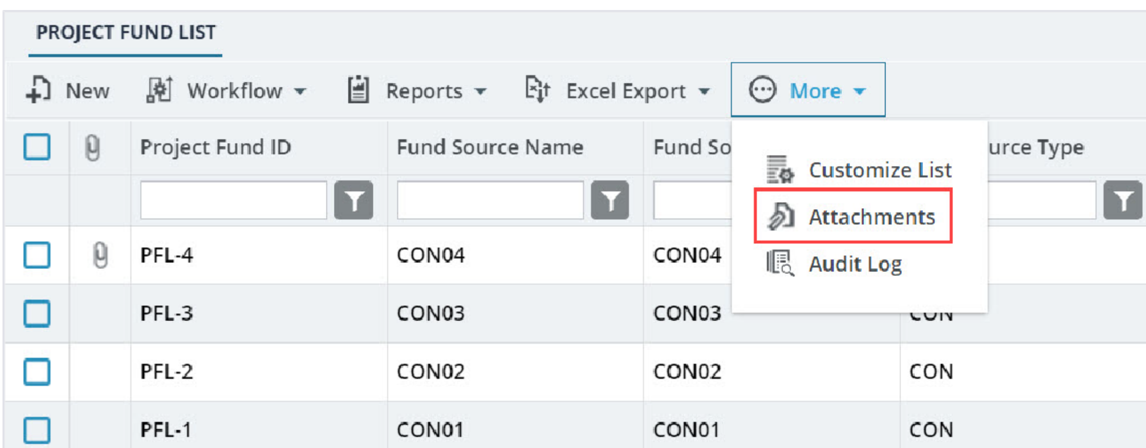


Figure 94: Using Attachments Option

The attachments of all the records are listed.

Figure 95: List of Attachments

Various document management features are available for attachments.

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

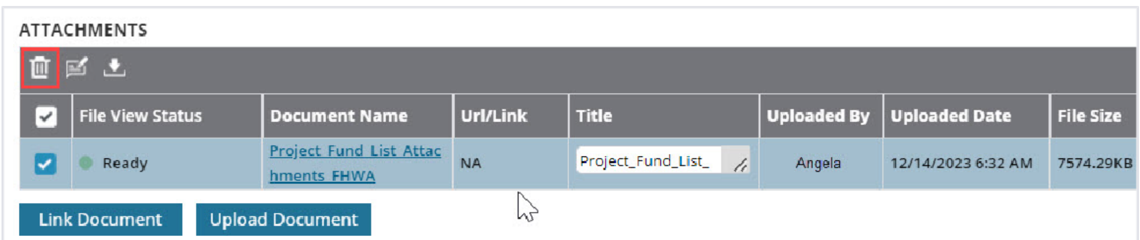


Figure 96: Using Delete Option

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.

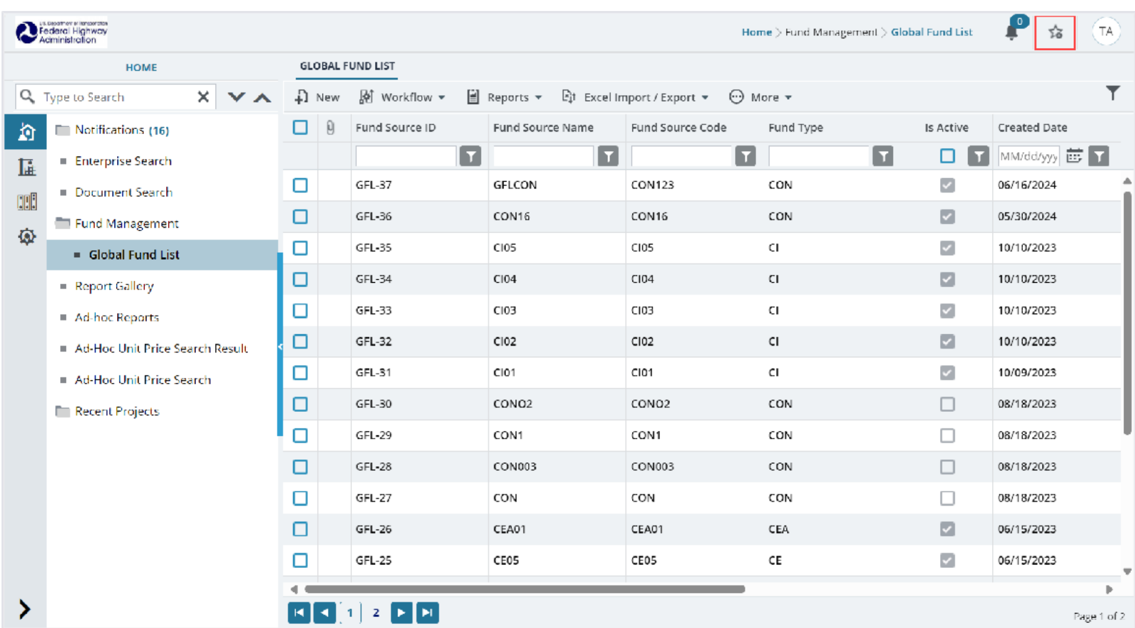


Figure 97: Navigating to Favorites

2. Click **Favorites**.
   The following image displays a sample form to add a bookmark.

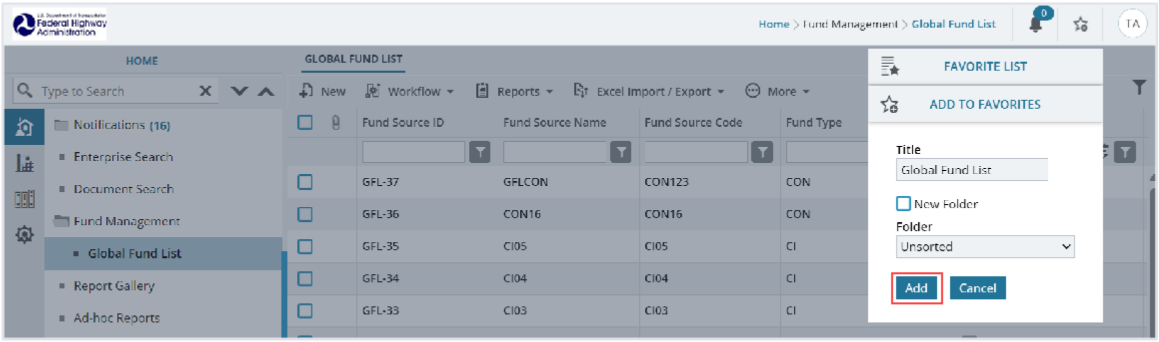


Figure 98: Favorites

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.

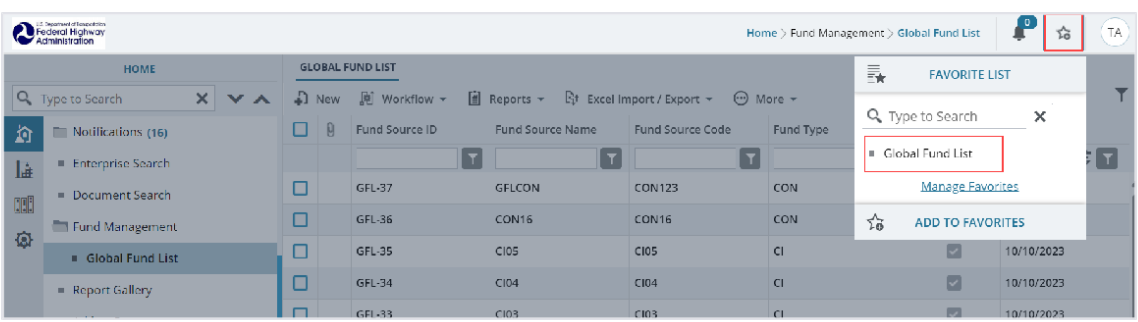


Figure 99: Favorite List

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**.

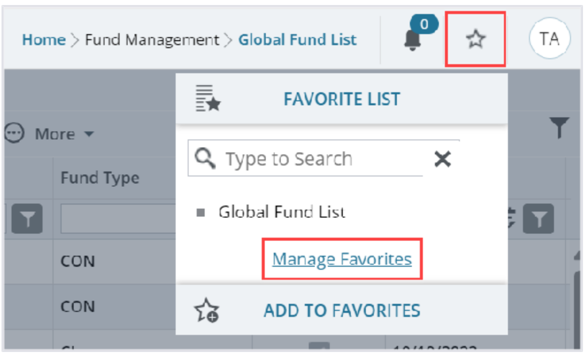


Figure 100: Manage Favorites

The **Favorite Management** page is displayed.

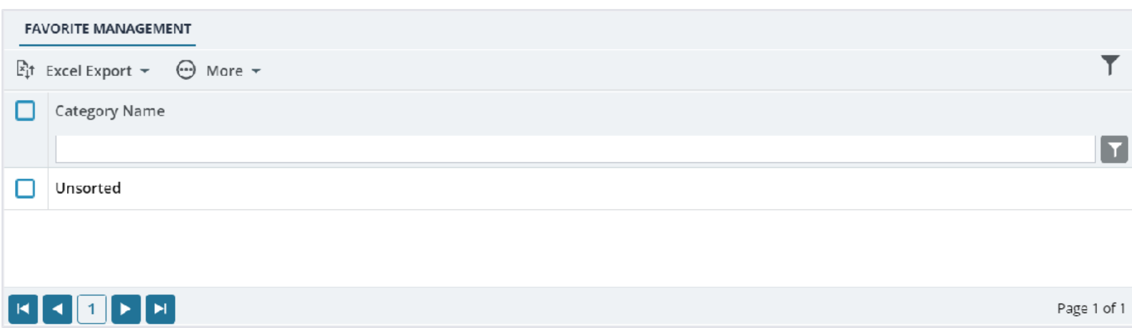


Figure 101: Favorite Management

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

Figure 102: Edit the Favorite

The bookmarks in the category are displayed.

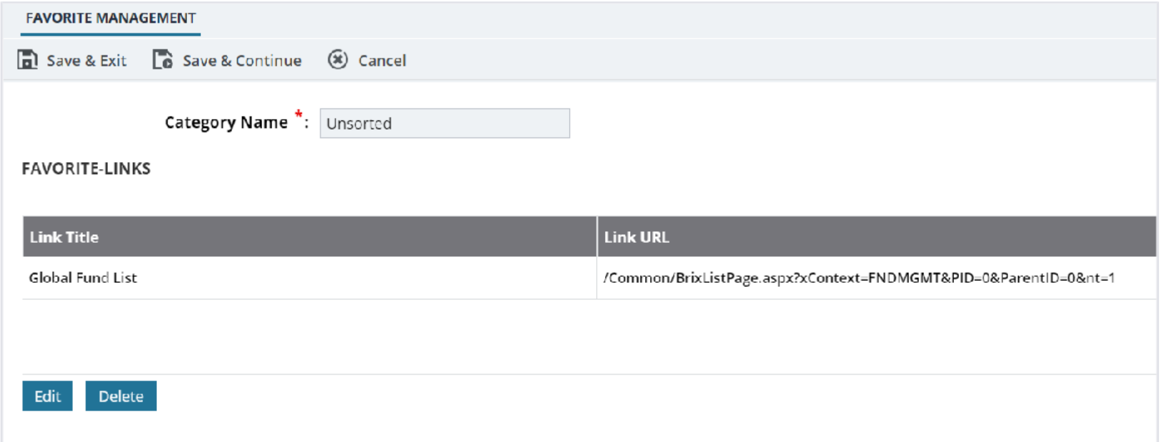


Figure 103: Favorite Management - Edit

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.

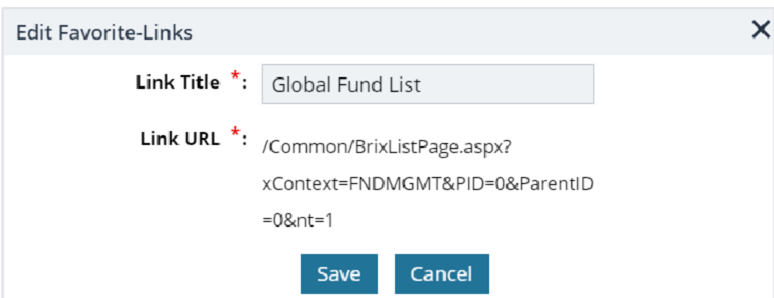


Figure 104: Edit Favorite Links

    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**.

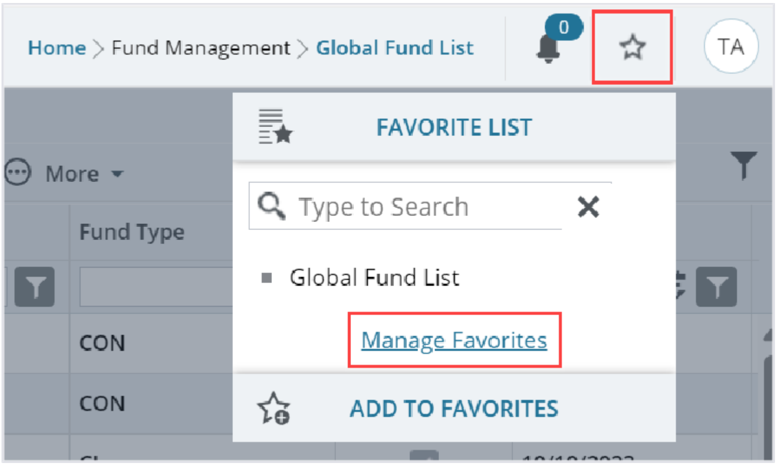


Figure 105: Manage Favorites

The **Favorite Management** page is displayed.

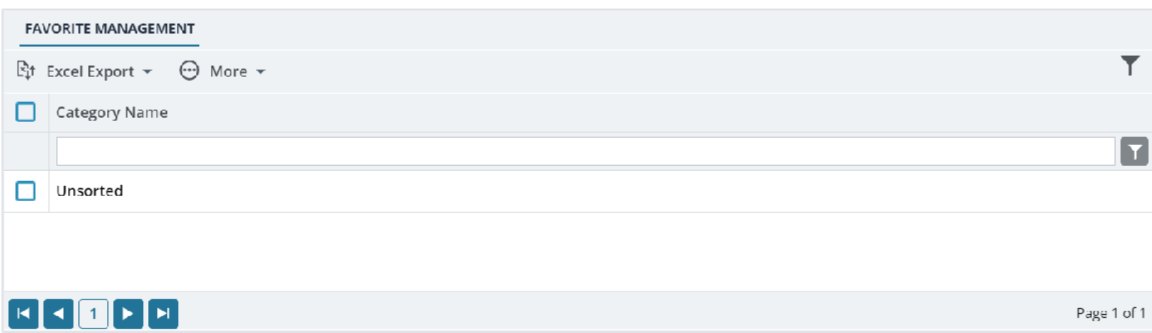


Figure 106: Favorite Management

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**.

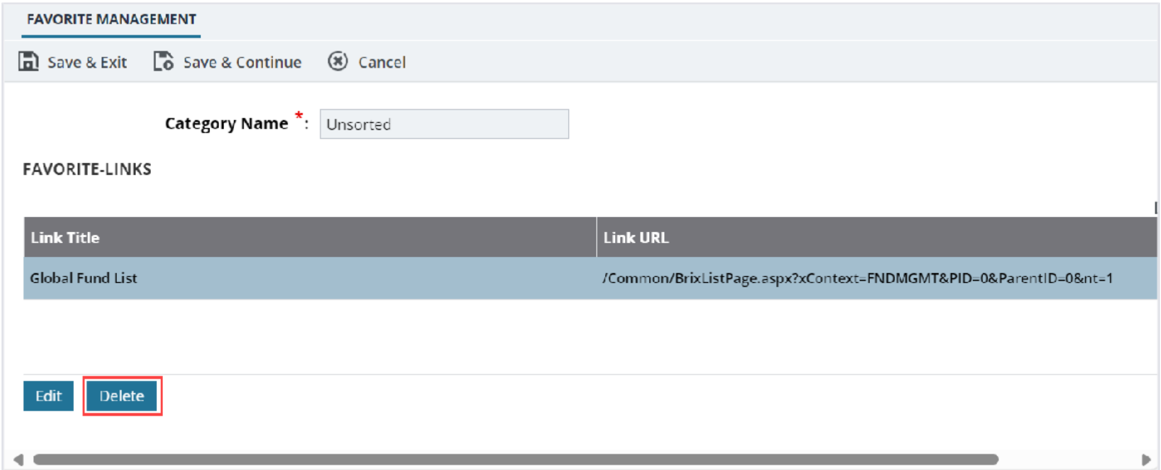


Figure 108: Delete the Favorite

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**.

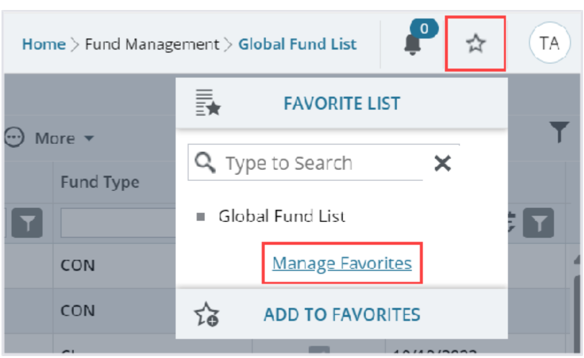


Figure 109: Manage Favorites

The **Favorite Management** page is displayed.

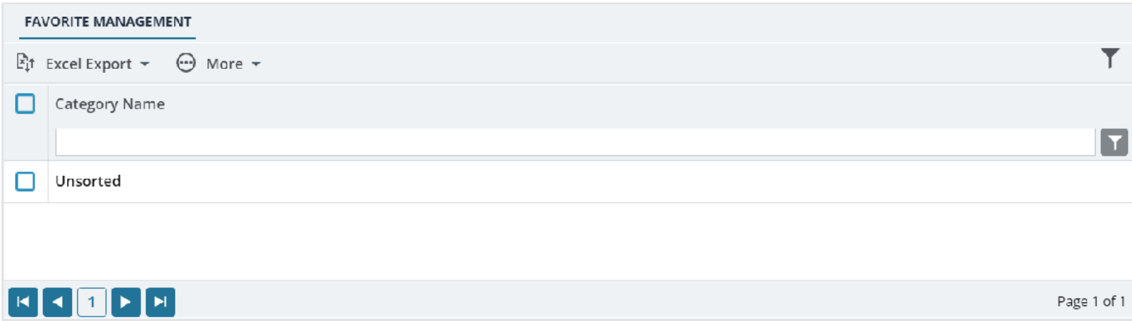


Figure 110: Favorite Management

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

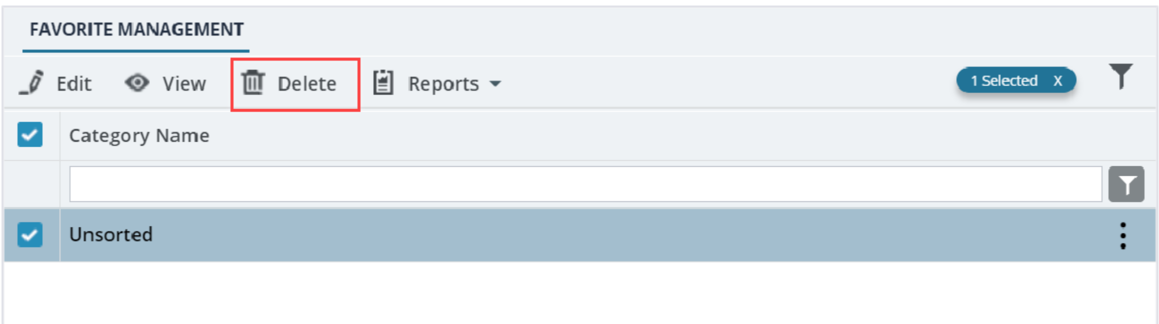


Figure 111: Delete Favorite Folder

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 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.

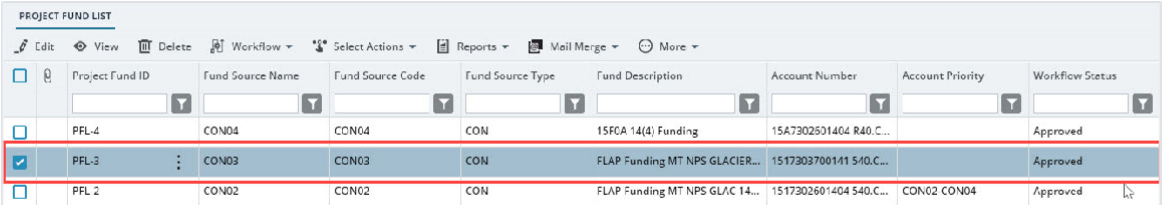


Figure 112: Selecting a Record

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

Figure 113: Selecting Multiple Records with the same Workflow Status

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

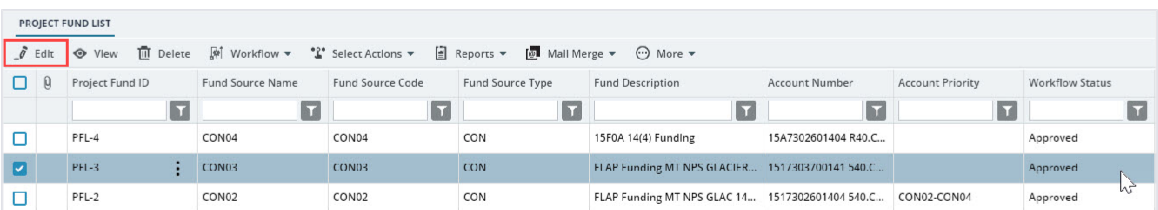


Figure 114: Editing a Record

The Project Fund List page is displayed.

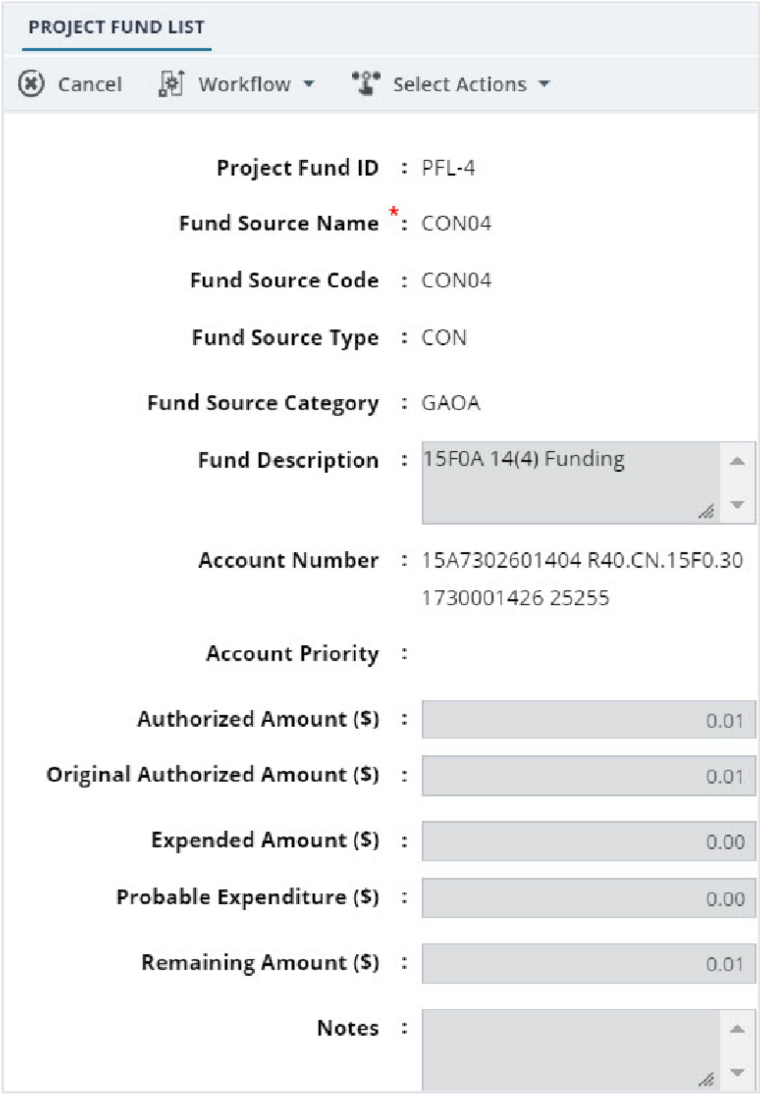


Figure 115: Project Fund List Page

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

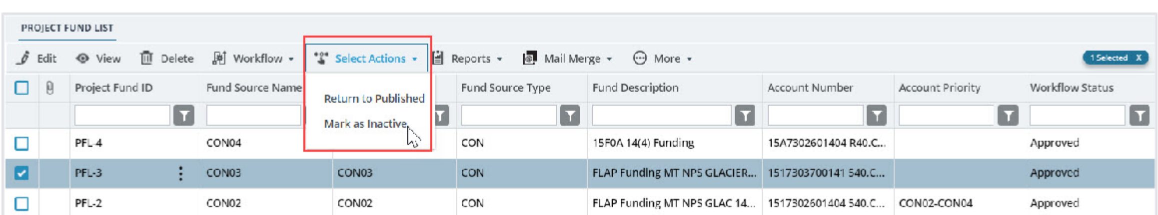


Figure 116: Using Select Actions Option – List Page

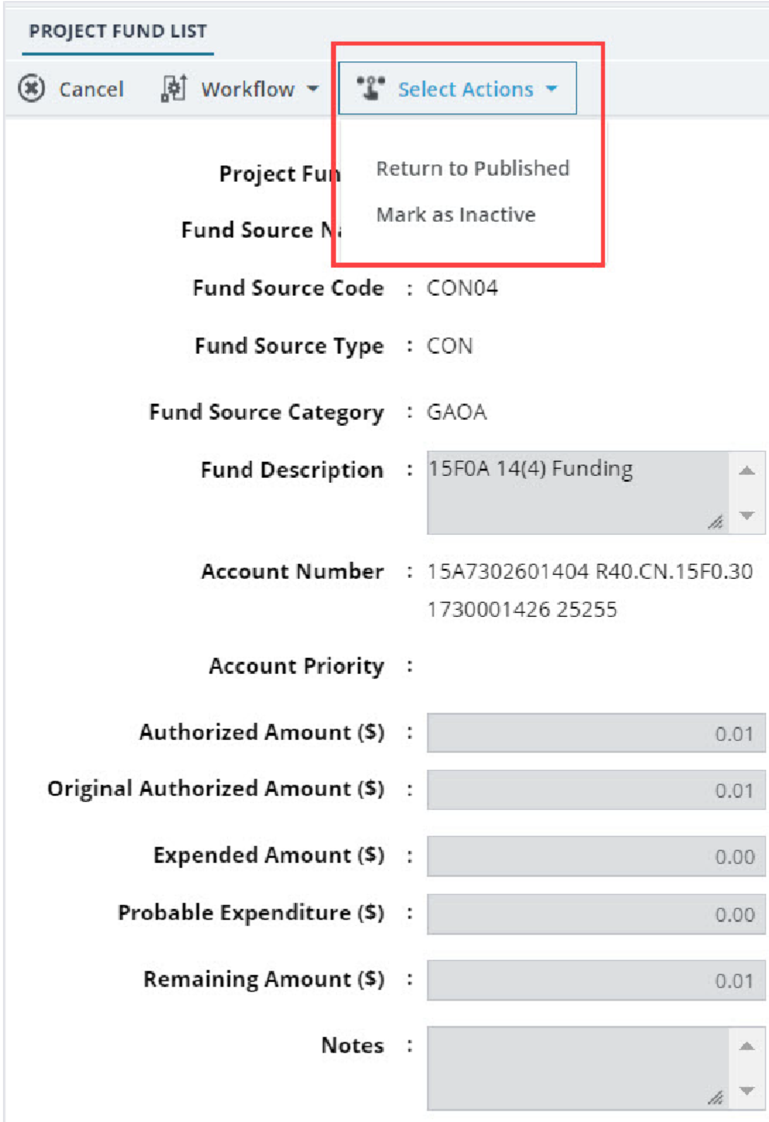


Figure 117: Using Select Actions Option – Details Page

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

The **Masterworks** dialog box is displayed.

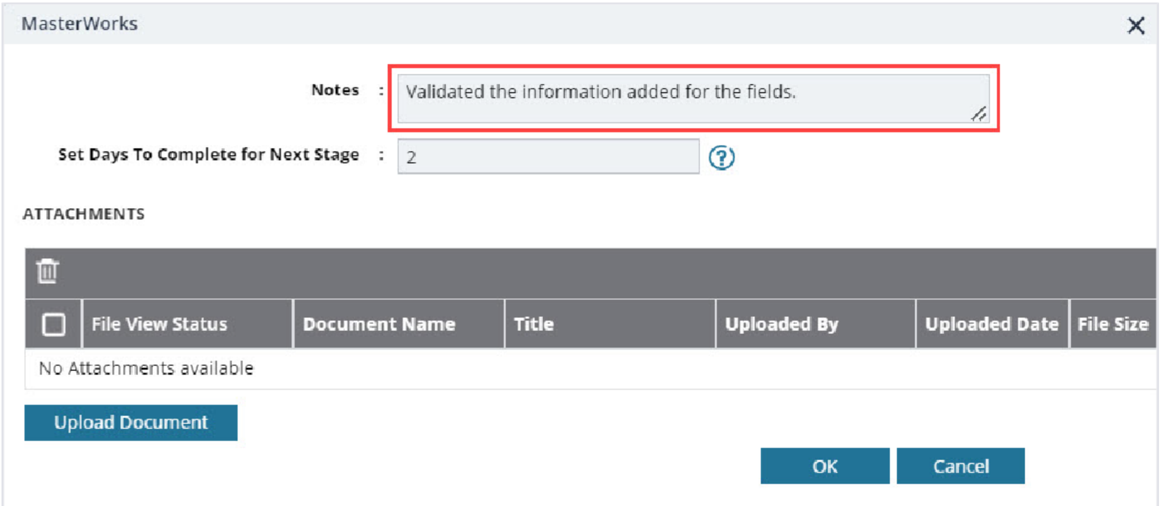


Figure 118: Masterworks Dialog Box

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.

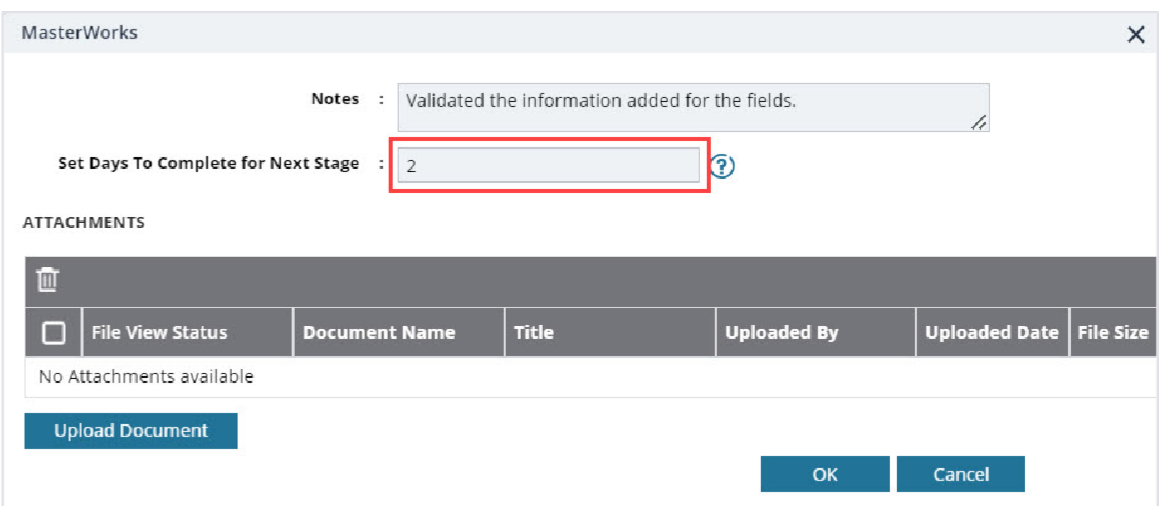


Figure 119: Set Days To Complete for Next Stage

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

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

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.

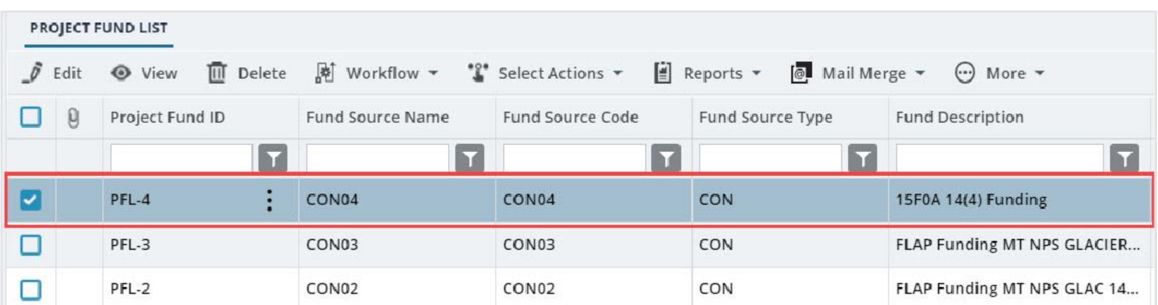


Figure 120: Selecting a Record

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

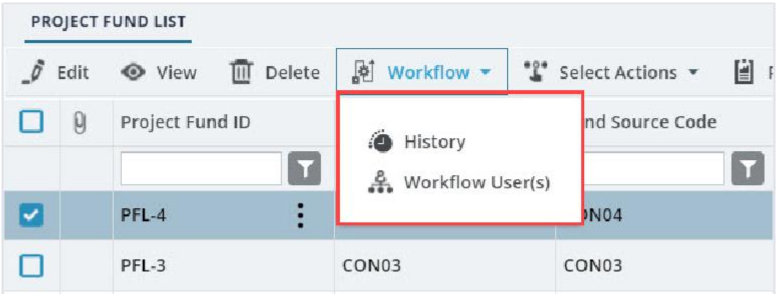


Figure 121: Using History Option

The Workflow Status & History dialog box is displayed.

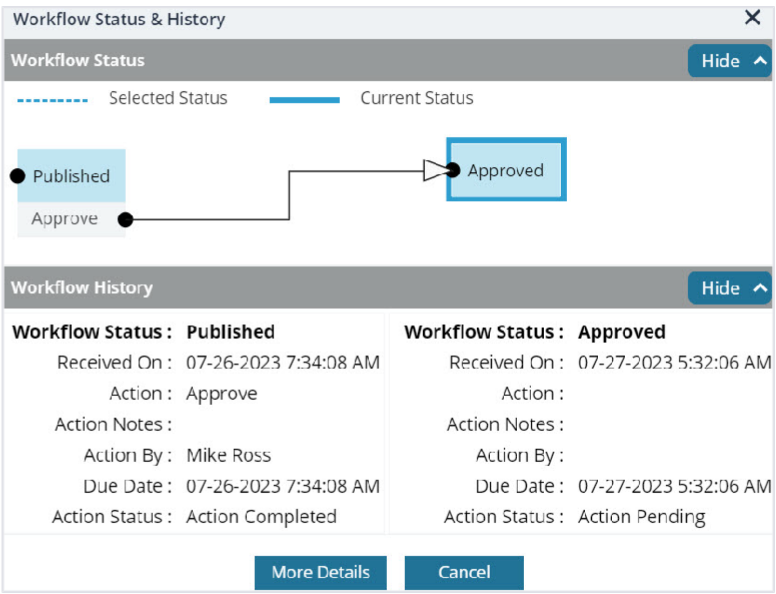


Figure 122: Workflow Status & History Dialog Box

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

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

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

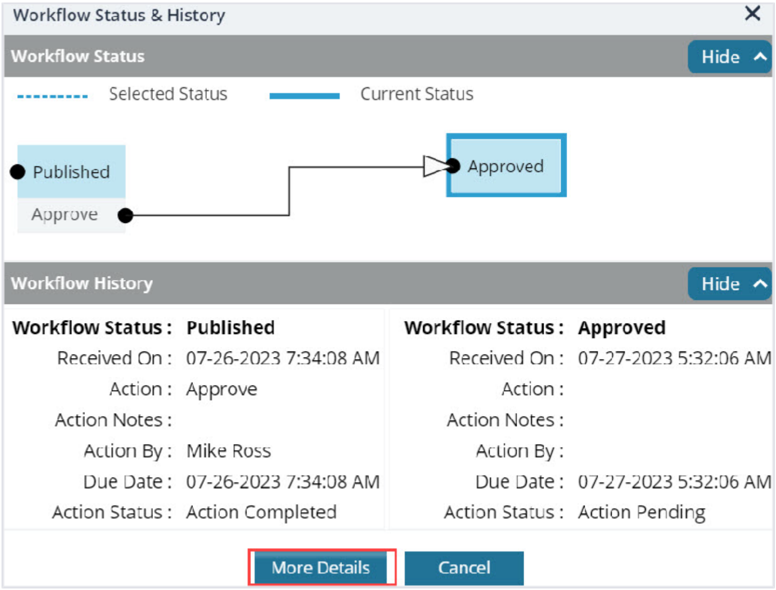


Figure 123: More Details option

The **History** page is displayed.

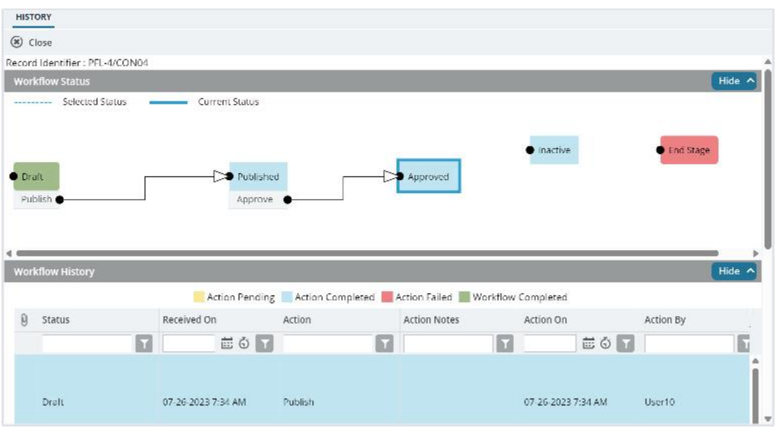


Figure 124: History Page

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.

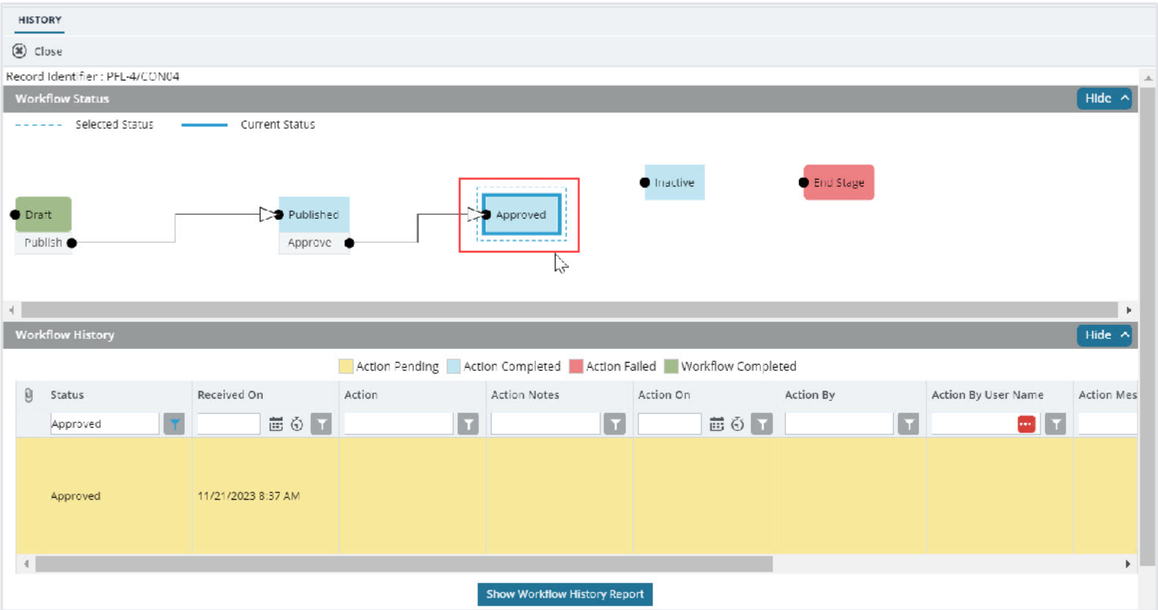


Figure 125: Workflow Status Section

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.

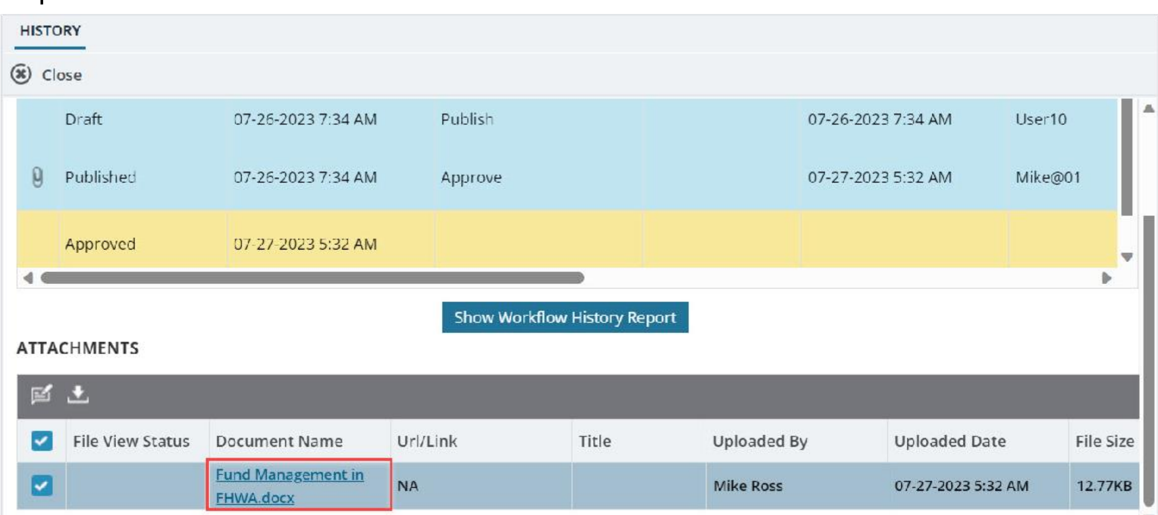


Figure 126: Clicking Document Name

The document is opened in the application viewer.

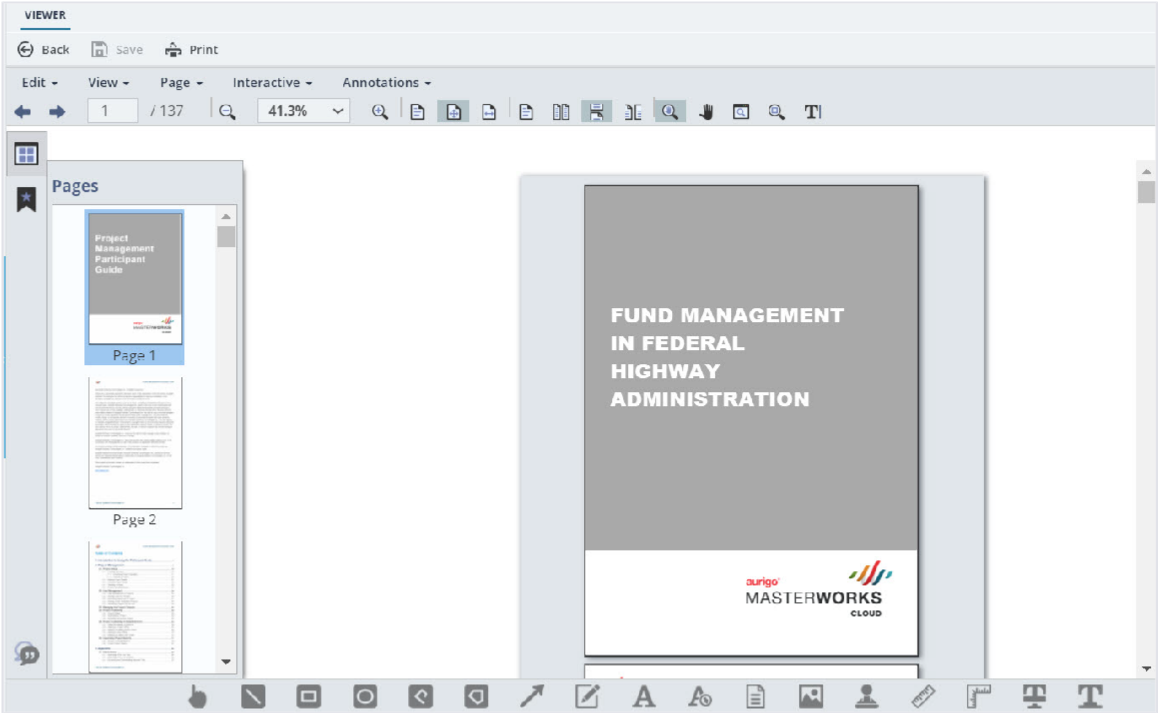


Figure 127: Viewing a Document in the Application Viewer

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

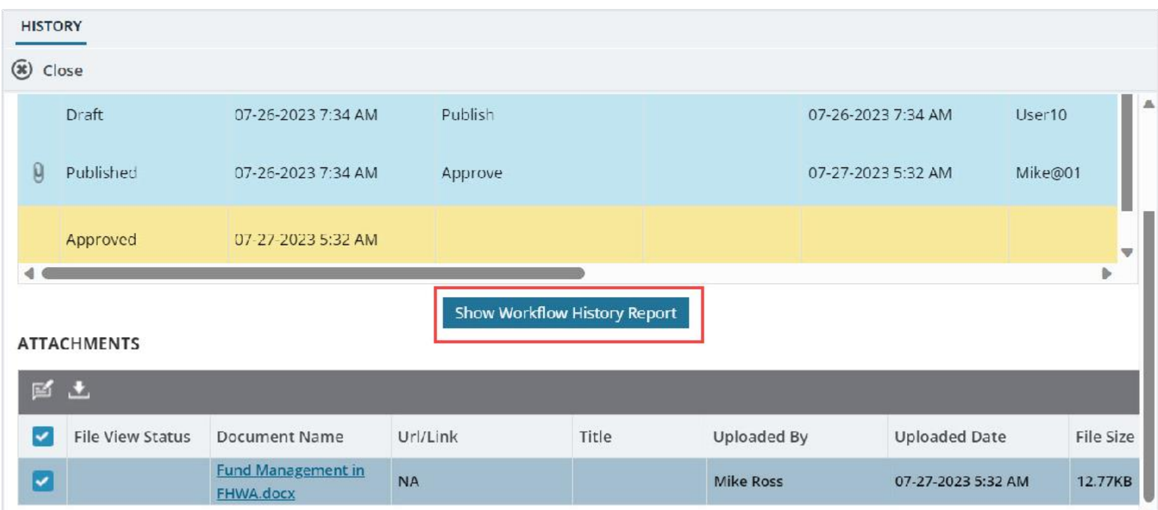
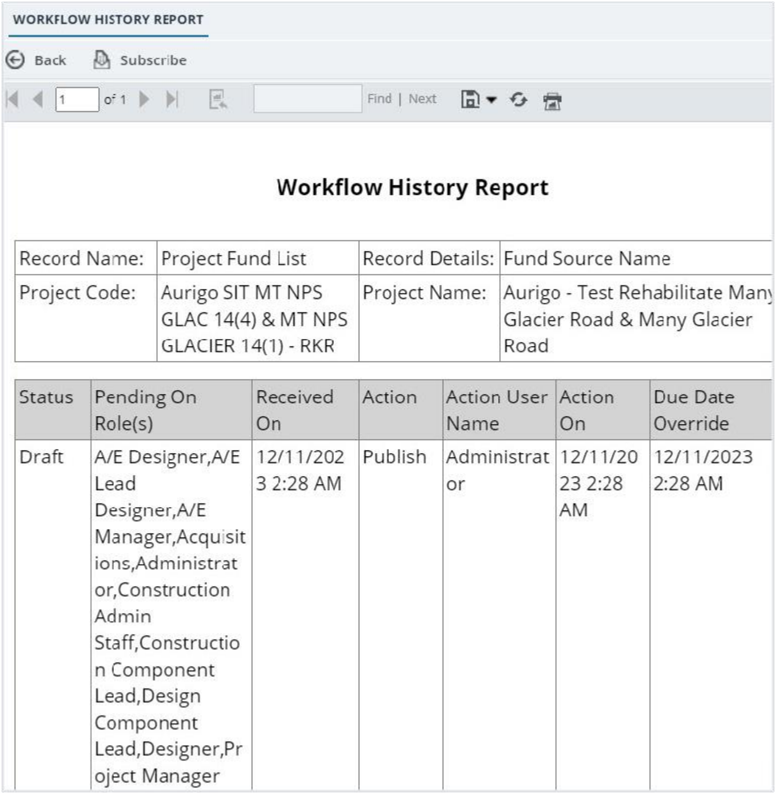


Figure 128: Using Show Workflow History Report Option

The **Workflow History Report** is displayed.



WORKFLOW HISTORY REPORT

Back Subscribe

1 of 1 Find | Next

Workflow History Report

Record Name:	Project Fund List	Record Details:	Fund Source Name
Project Code:	Aurigo SIT MT NPS GLAC 14(4) & MT NPS GLACIER 14(1) - RKR	Project Name:	Aurigo - Test Rehabilitate Many Glacier Road & Many Glacier Road

Status	Pending On Role(s)	Received On	Action	Action User Name	Action On	Due Date Override
Draft	A/E Designer,A/E Lead Designer,A/E Manager,Acquisitions,Administrator,Construction Admin Staff,Construction Component Lead,Design Component Lead,Designer,Project Manager	12/11/2023 2:28 AM	Publish	Administrator	12/11/2023 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)**.

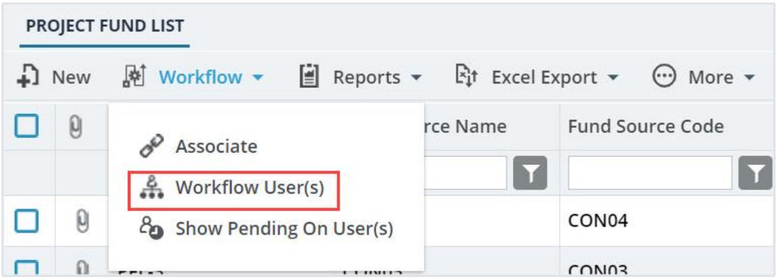


Figure 130: Using Workflow User(s) Option

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

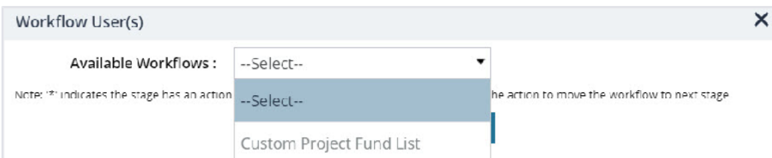


Figure 131: Published Workflows

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

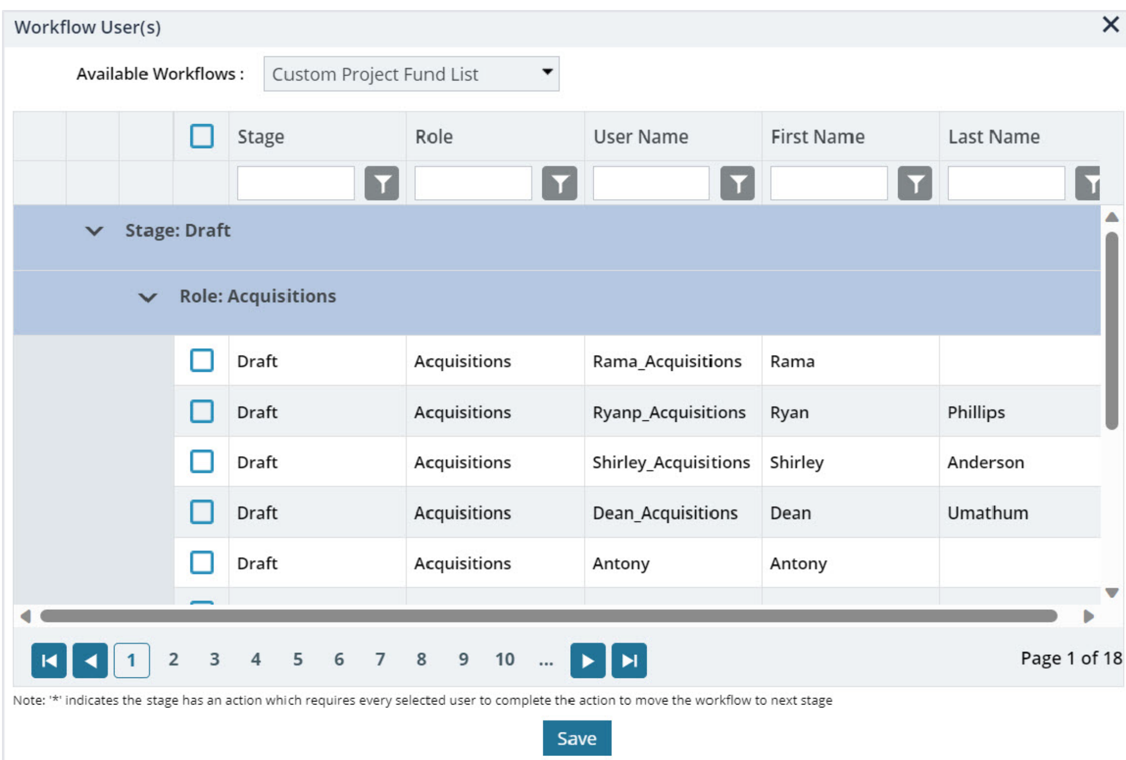


Figure 132: List of Stakeholders

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)**.

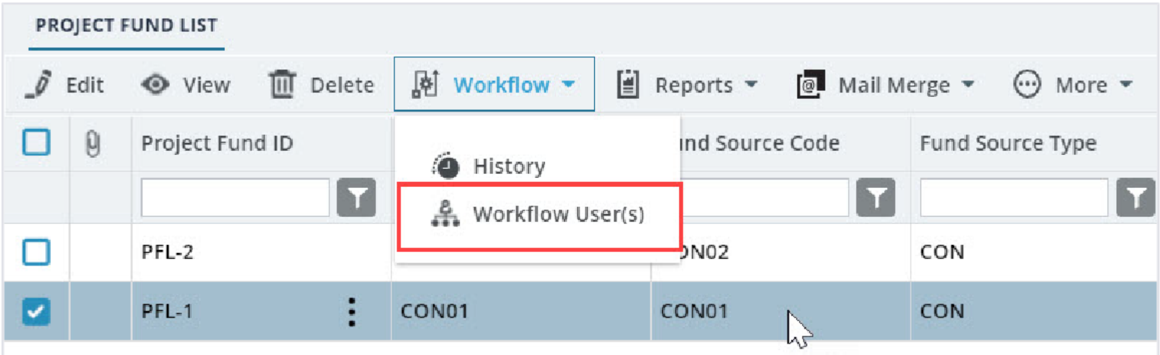


Figure 133: Using Workflow User(s) Option

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

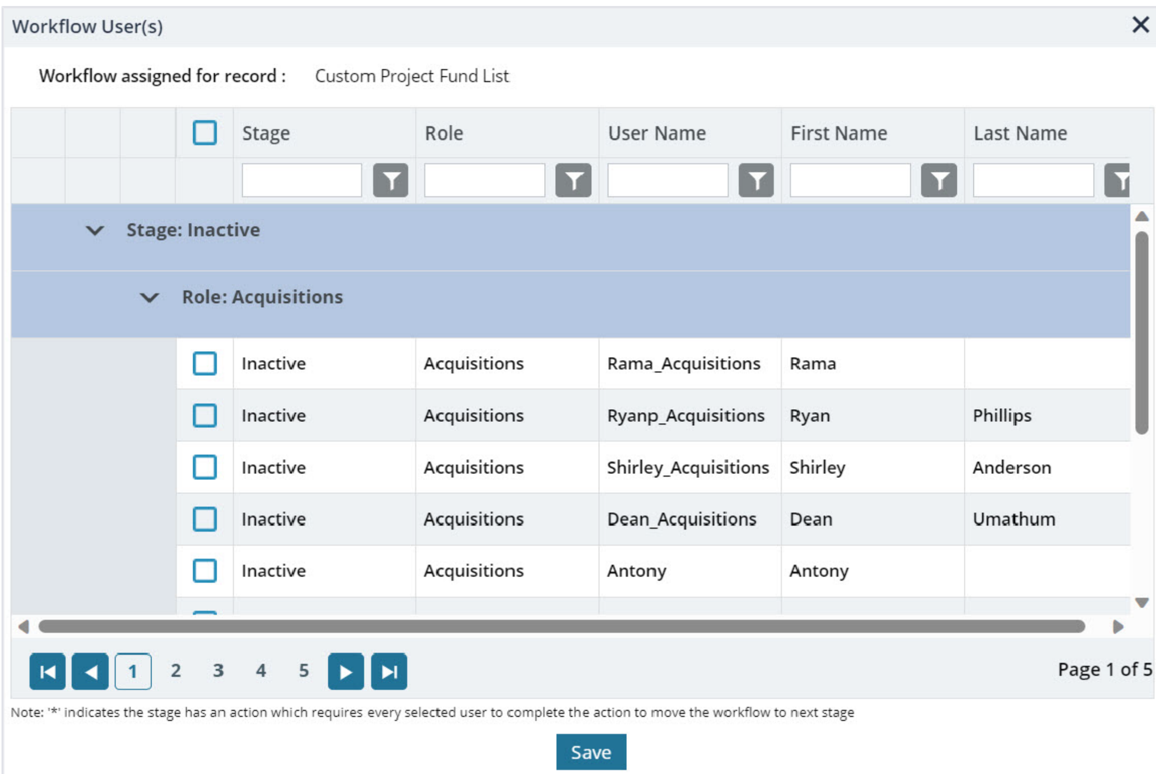


Figure 134: Workflow User(s) Page

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

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

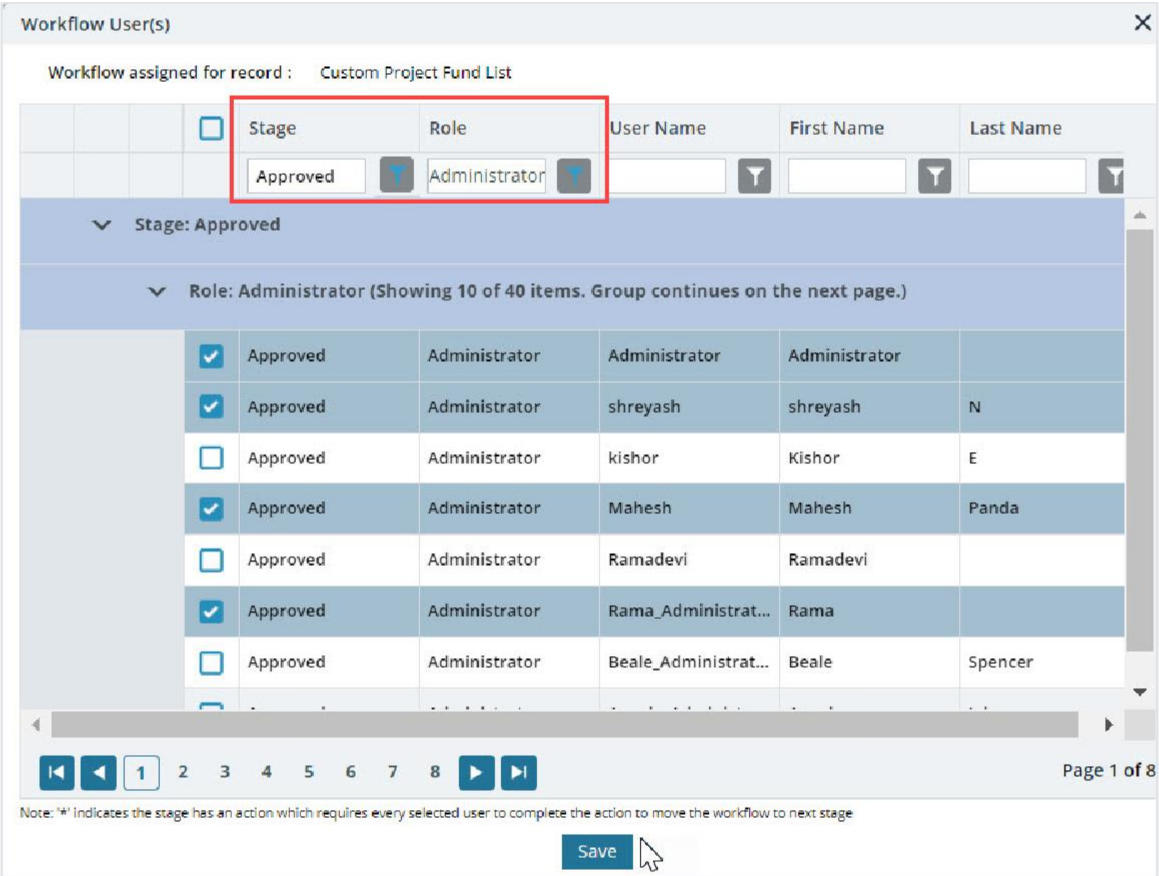


Figure 135: Using Filter Option

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

- Stage
- Role
- User Name
- First Name
- 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.

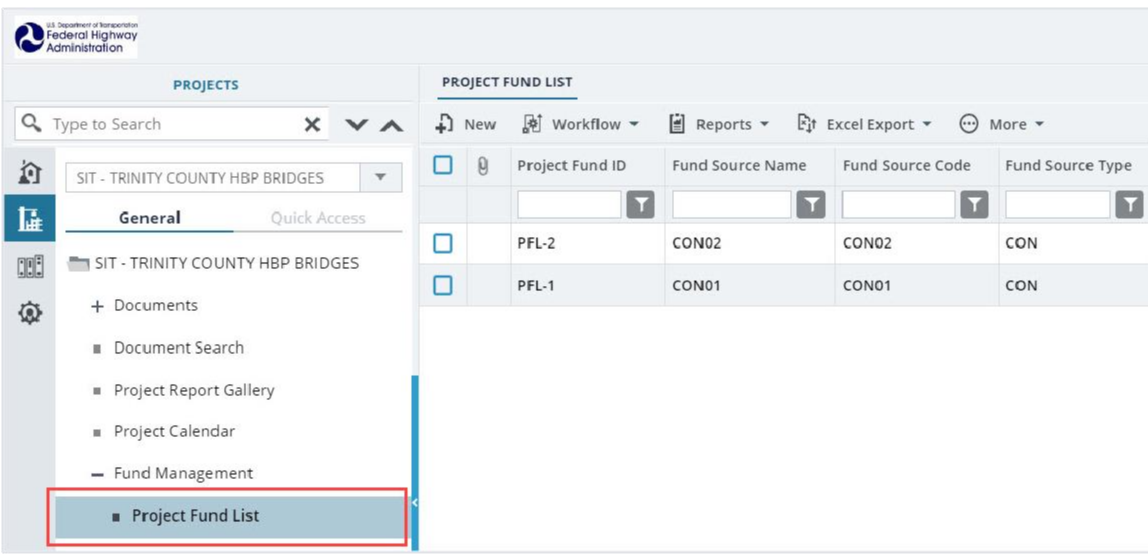


Figure 136: Selecting a Form

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

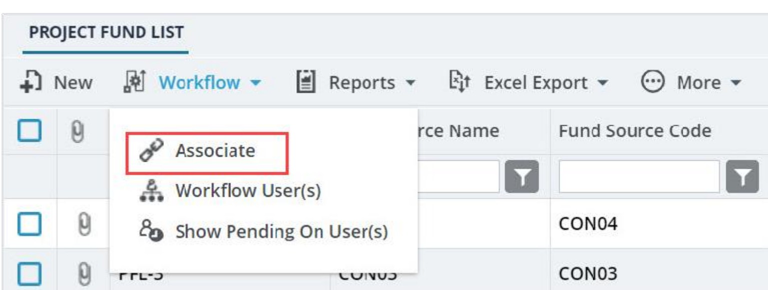


Figure 137: Using Associate Option

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

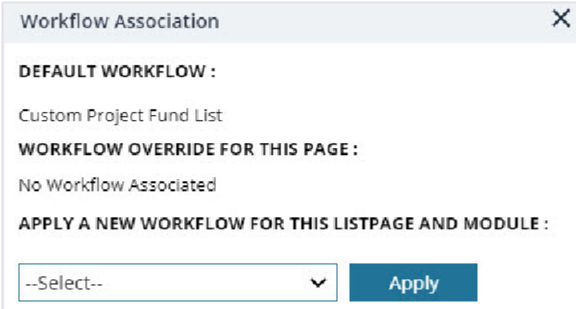


Figure 138: Workflow Association Dialog Box

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

3. 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.

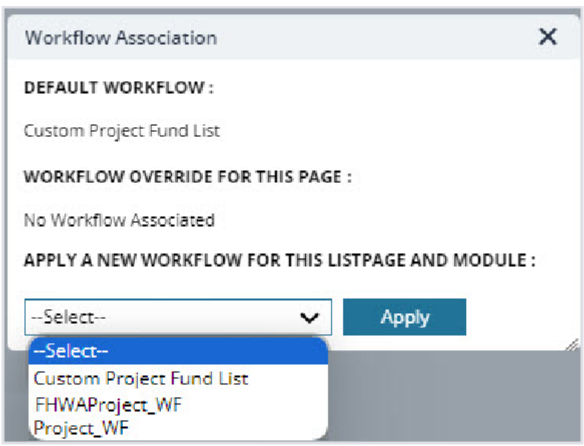


Figure 139: Using Applying a new Workflow for this List Page and Module Option

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.

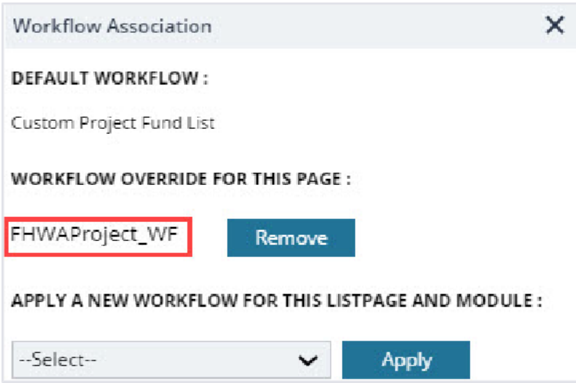


Figure 140: Updated Workflow Override for this Page Field

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.

4. 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.

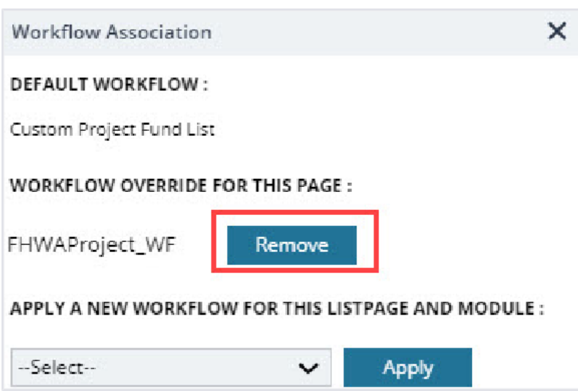


Figure 141: Resetting to Default Workflow

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.

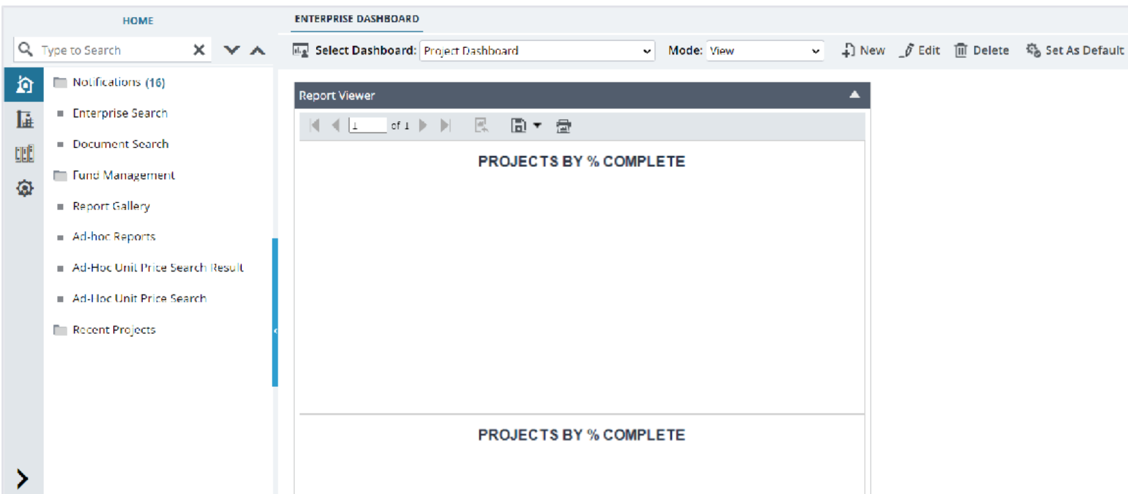


Figure 142: Enterprise Dashboard

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

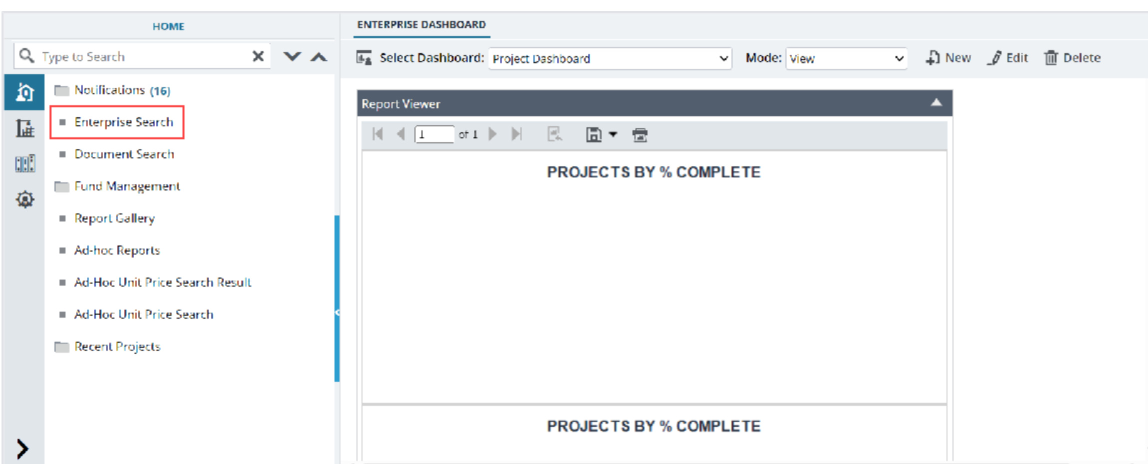


Figure 143: Enterprise Search

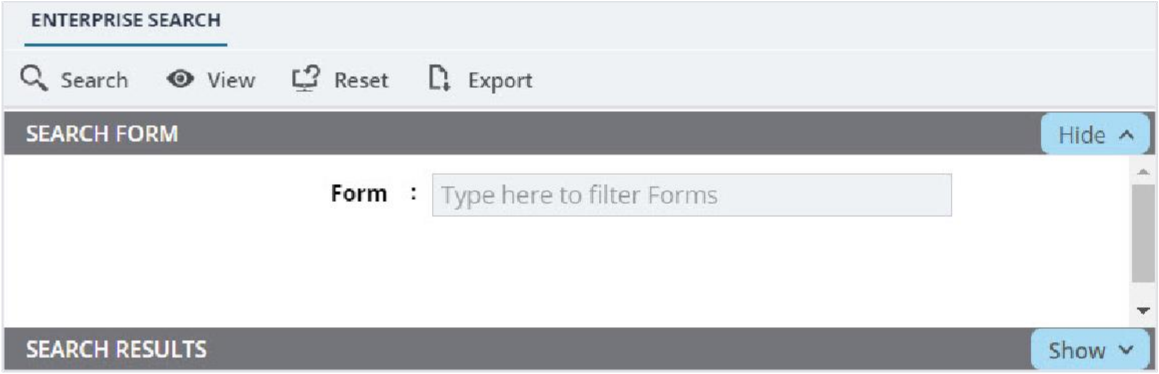


Figure 144: Enterprise Search

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.

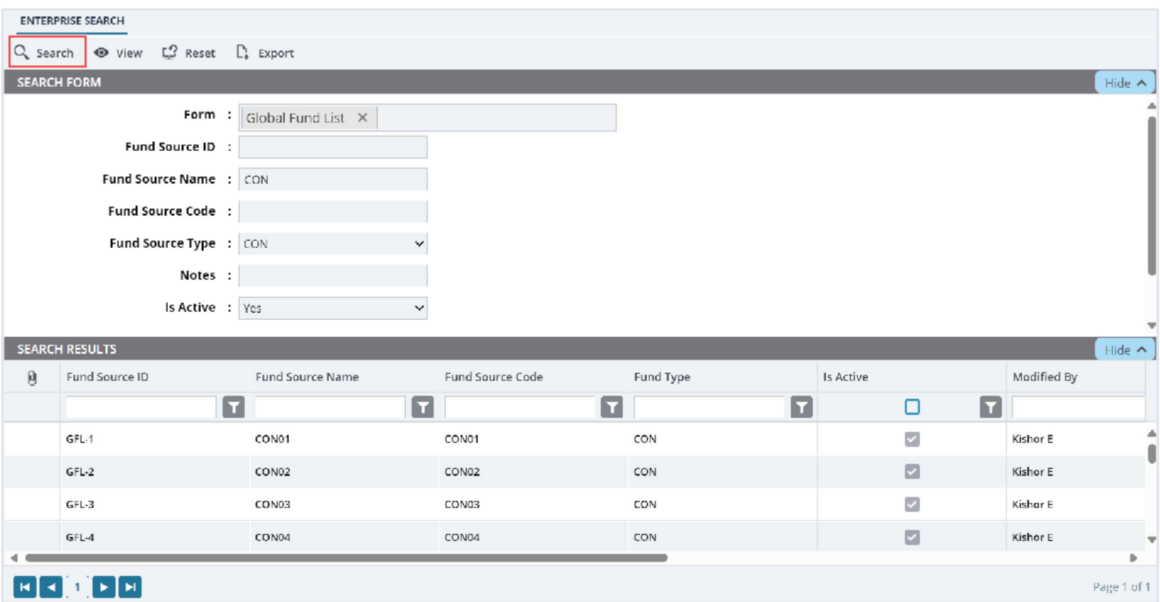


Figure 145: Search Results

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.

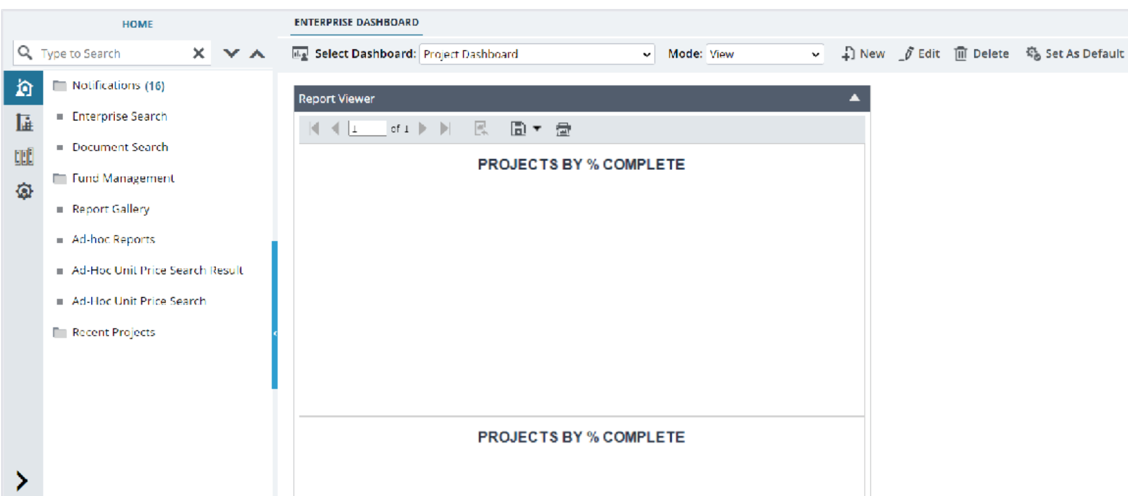


Figure 146: Enterprise Dashboard

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

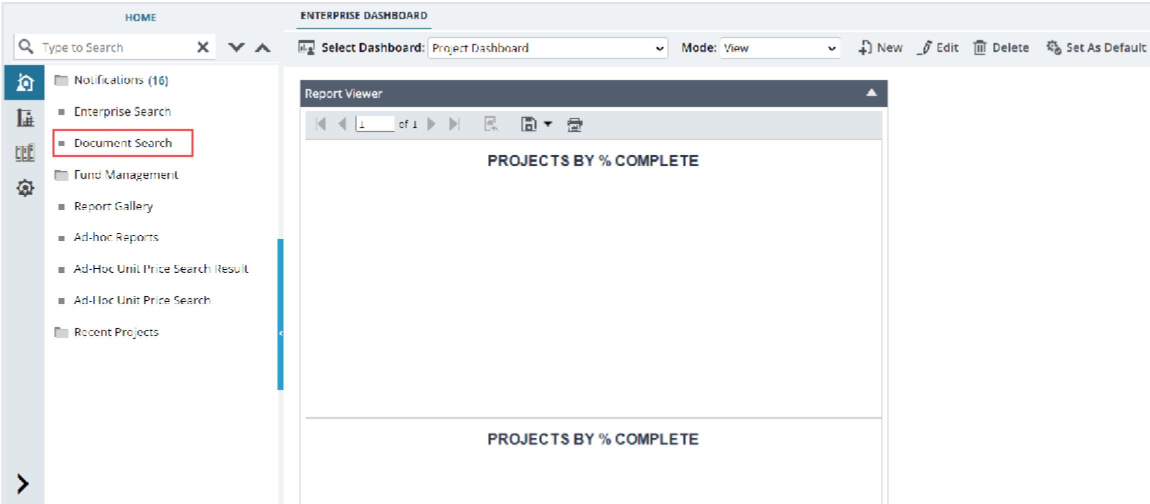


Figure 147: Document Search

The **SEARCH DOCUMENTS** page is displayed.

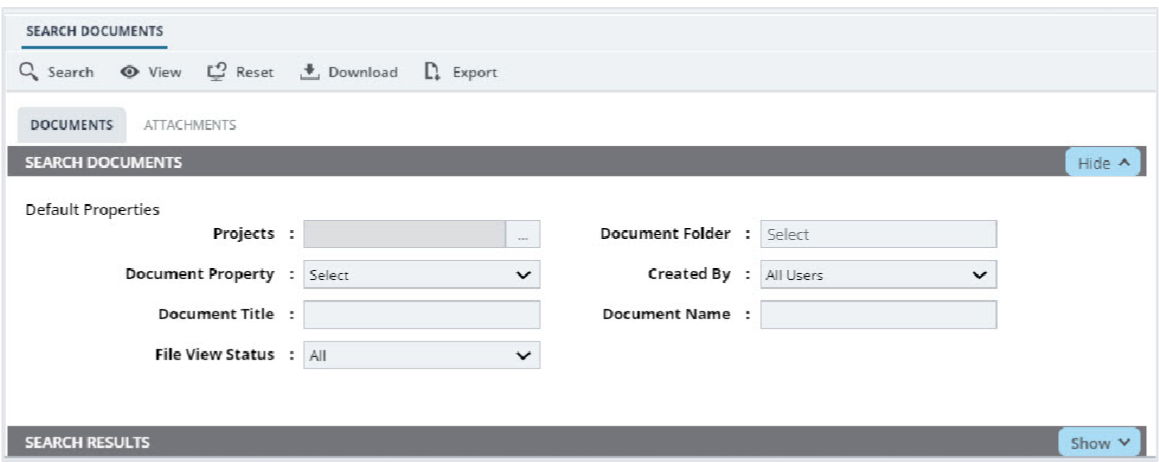


Figure 148: Search Documents

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.

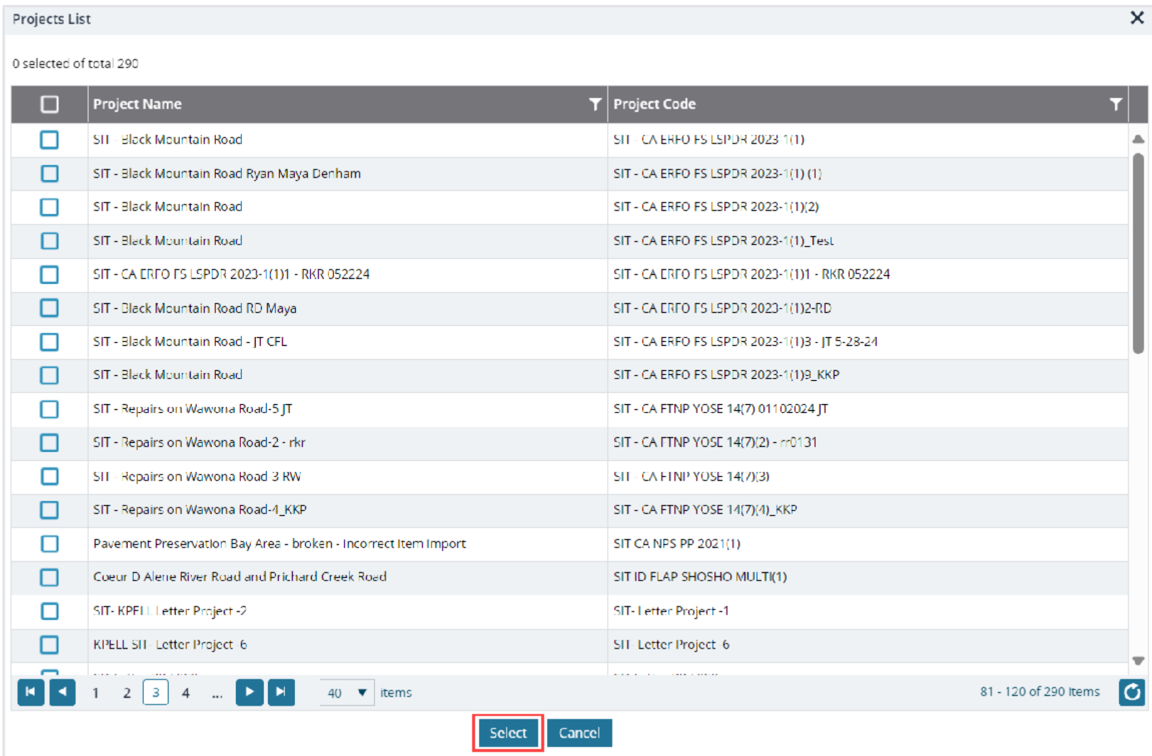


Figure 149: Projects List Dialog Box

   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.

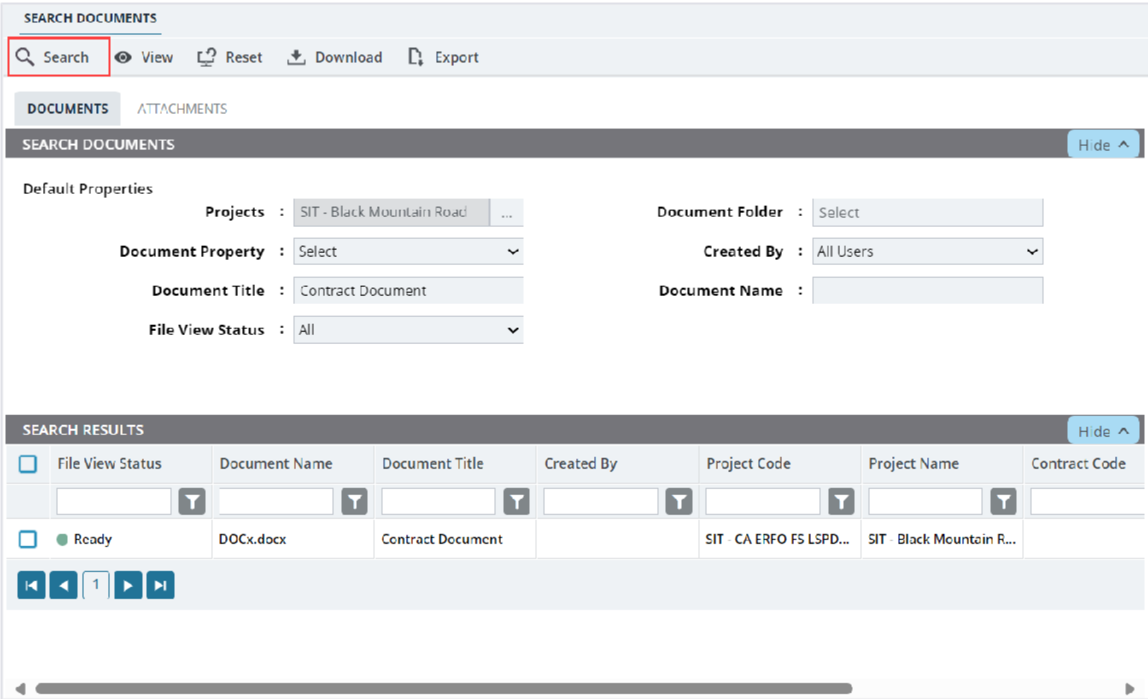


Figure 150: Search Results

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

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

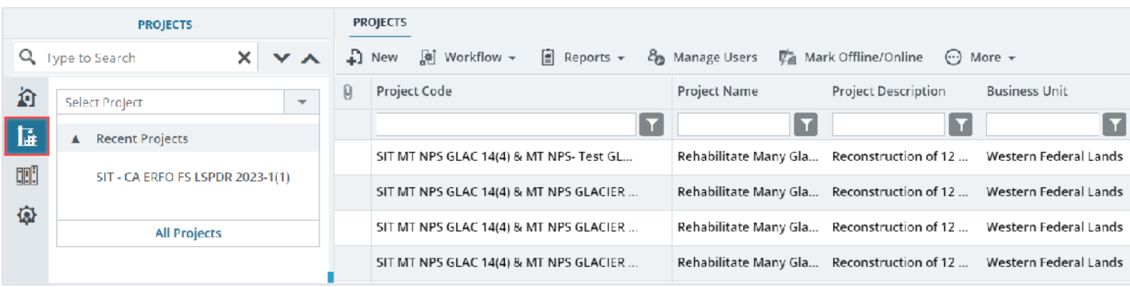


Figure 151: Navigation to Projects module

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

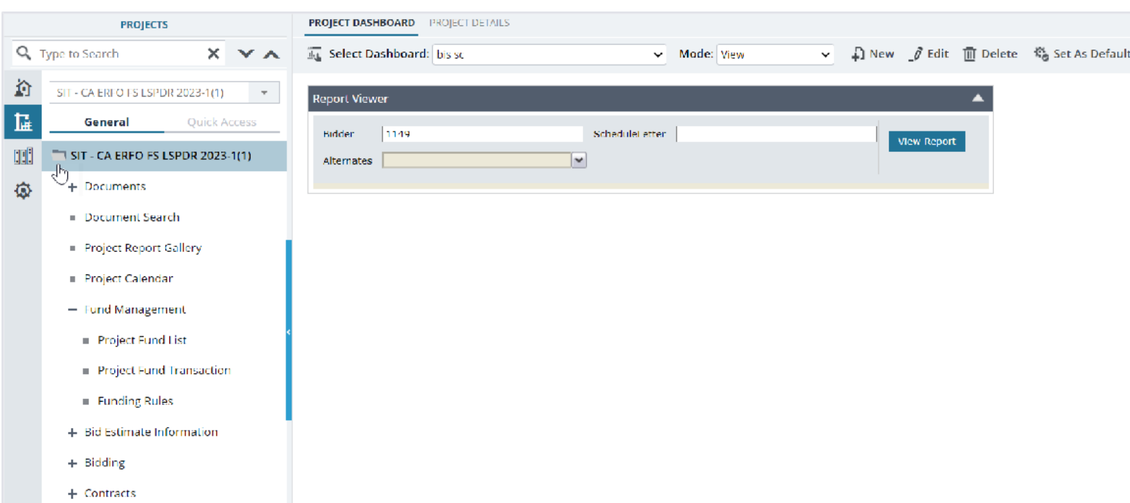


Figure 152: Expanding Projects Folder

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

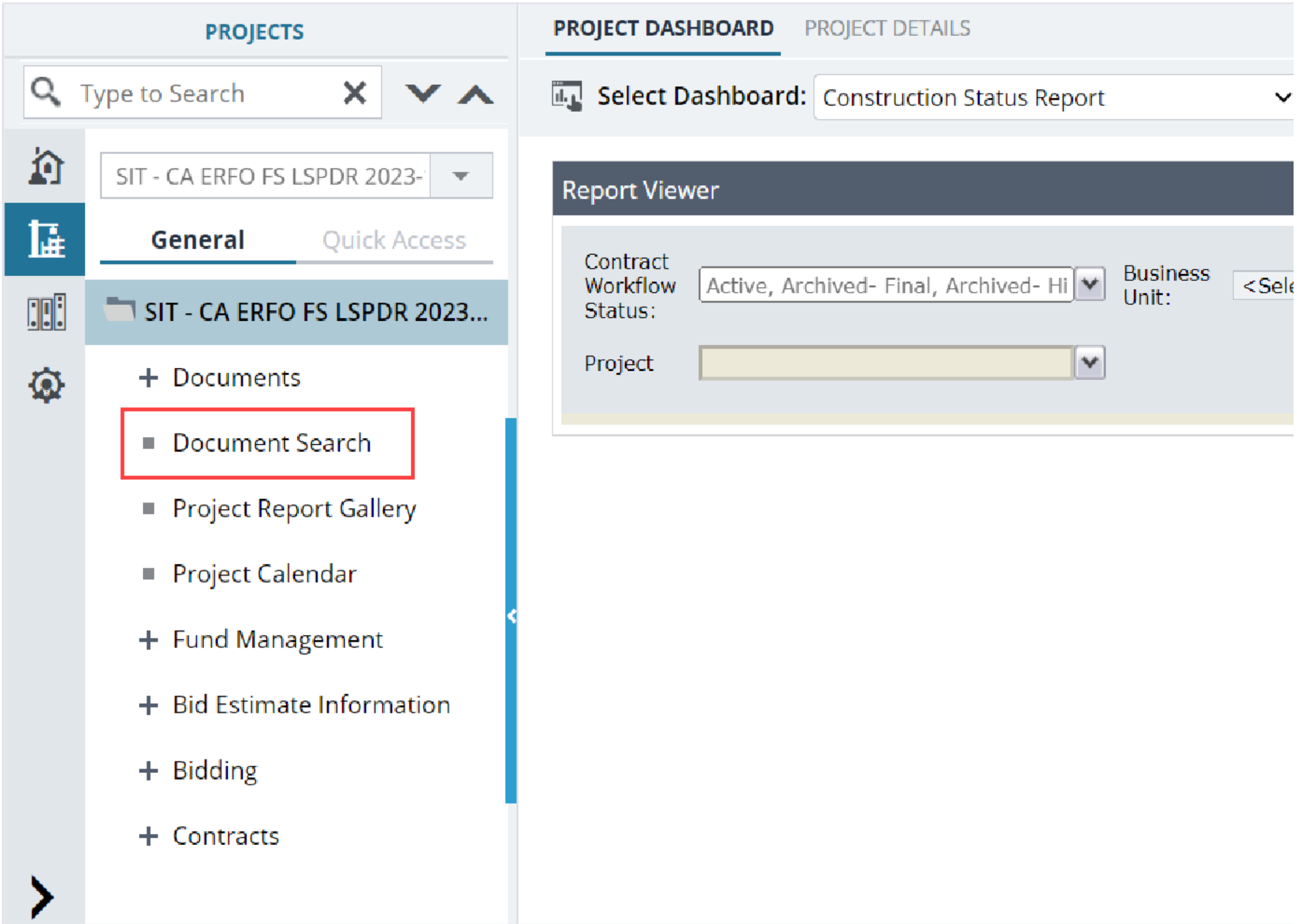


Figure 153: Document Search

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.

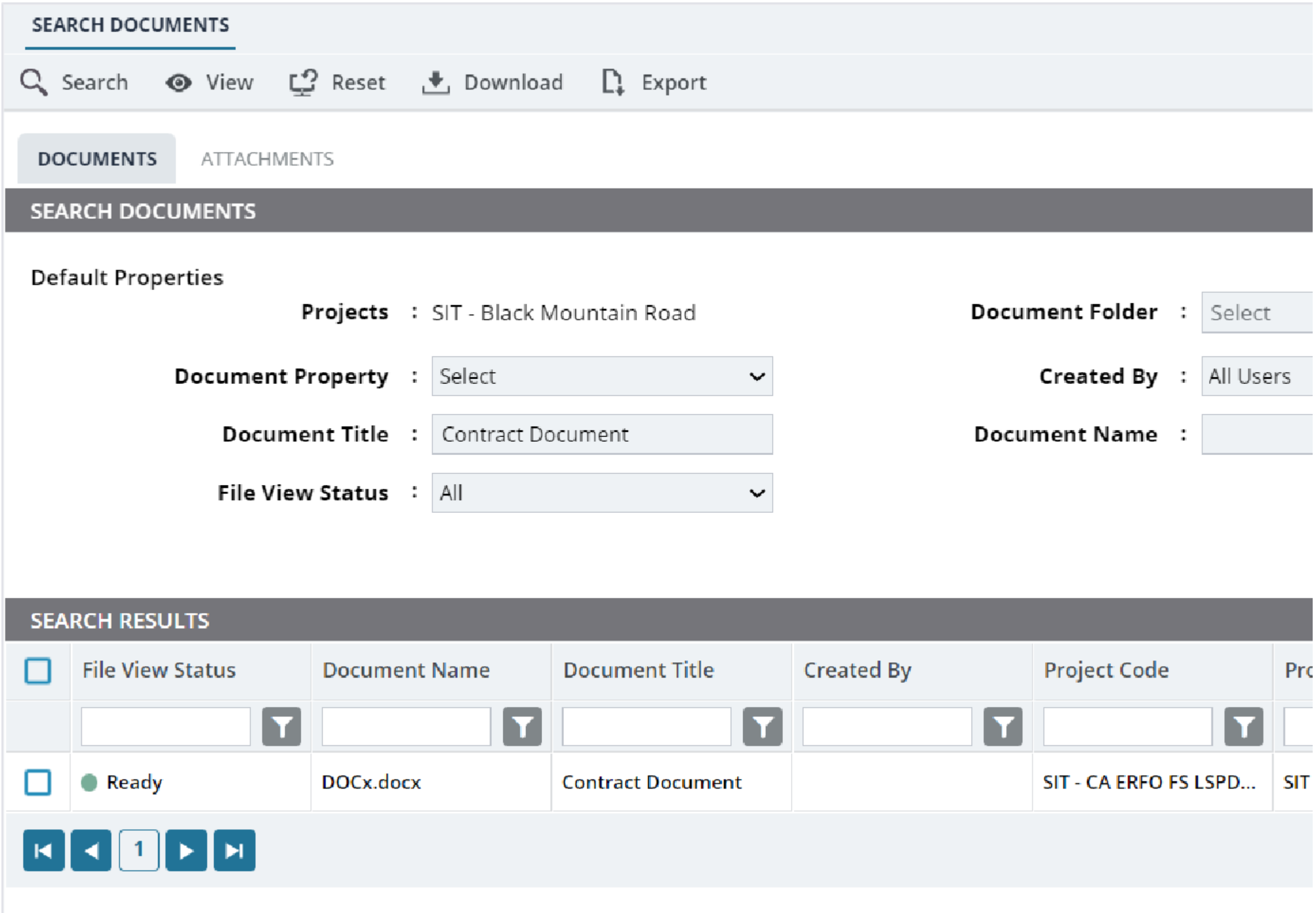


Figure 154: Search Results

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 Section 7.4.1. Viewing My Tasks.

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 Section 7.4.2. 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:

- 7.4.3. Complete a pending Task
- 7.4.4. Customize my tasks notifications

7.4.1. Viewing My Tasks

Overview

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

Steps

1. In Masterworks, click .

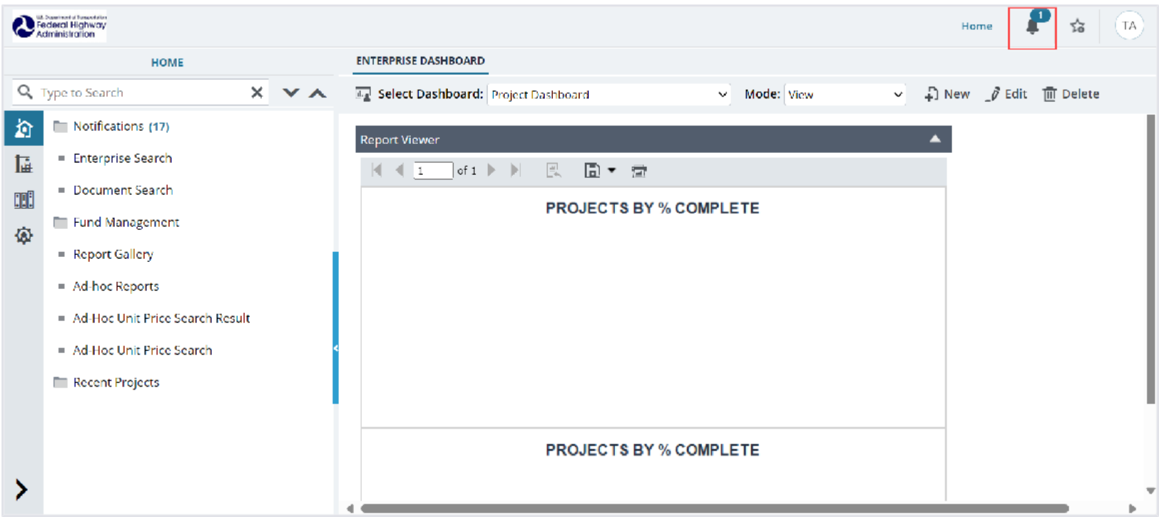


Figure 155: Notifications

The **My Tasks** page is displayed.

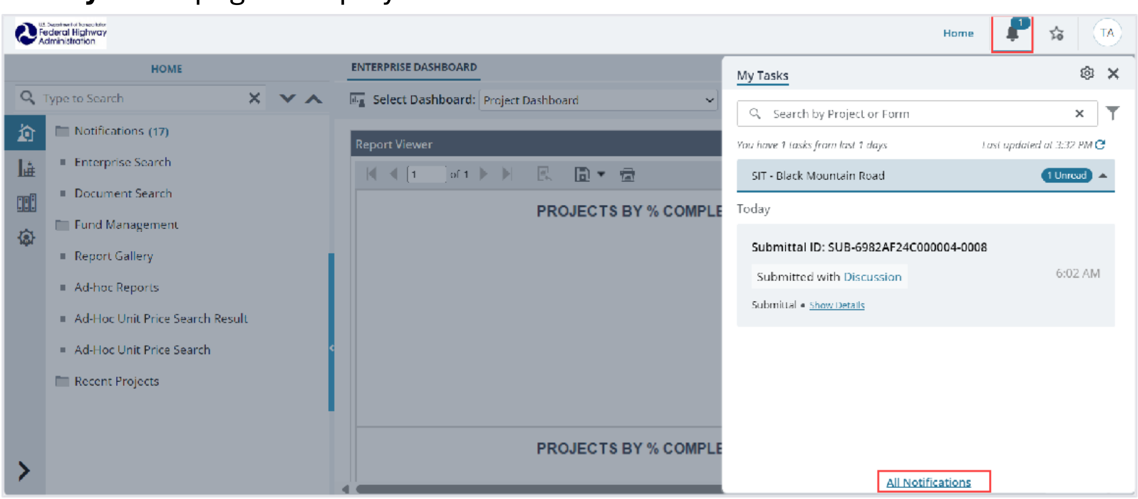


Figure 156: My Tasks Page

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.

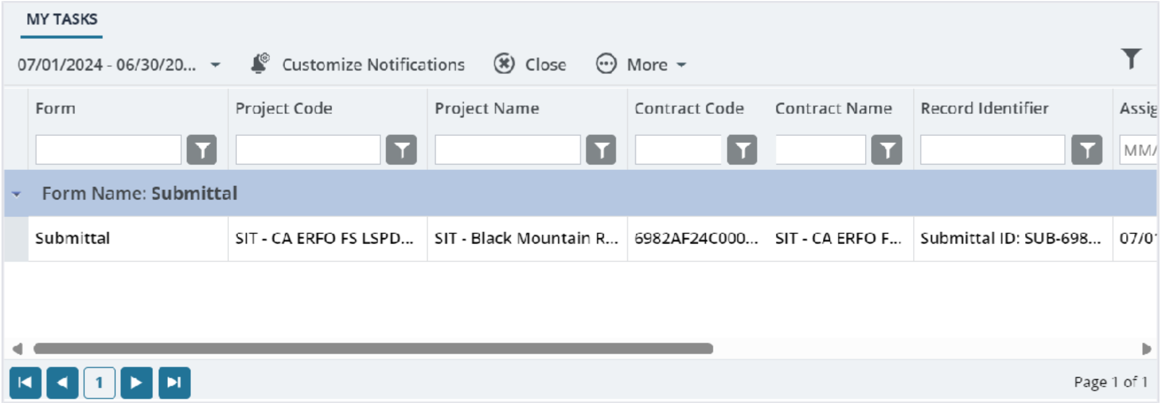


Figure 157: My Tasks List Page

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.

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 . The **My Tasks** page is displayed.

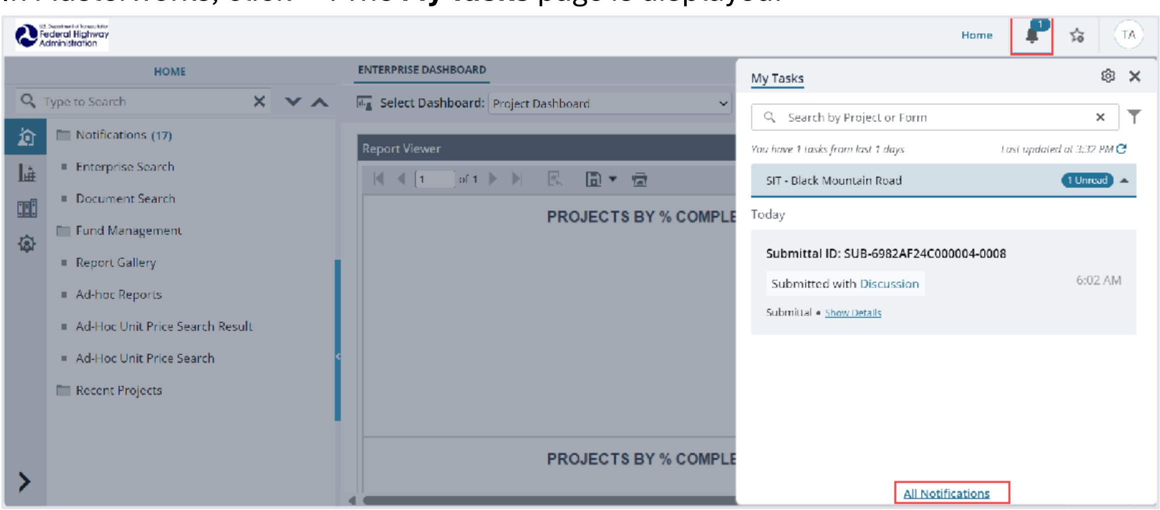


Figure 158: My Tasks page

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.

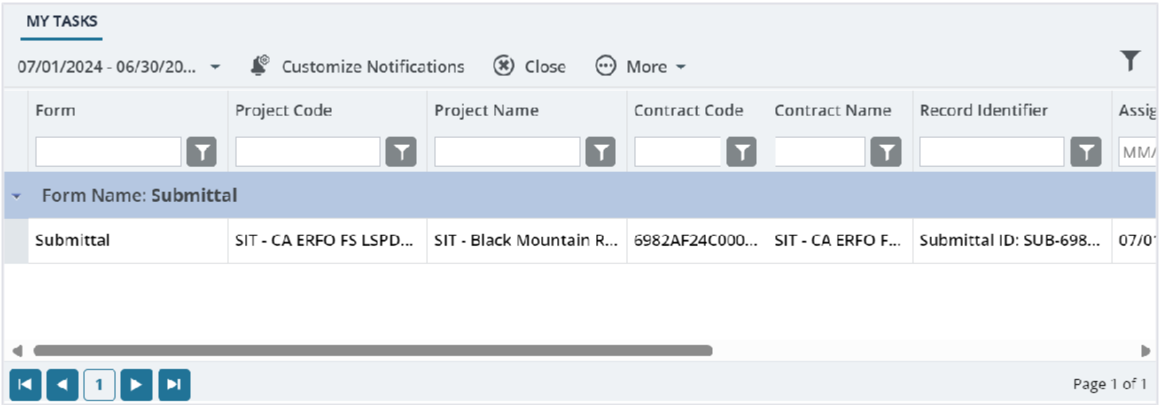


Figure 159: My Tasks List Page

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.

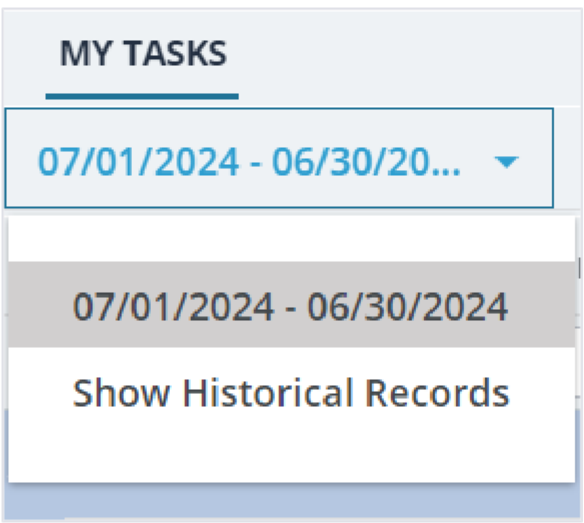


Figure 160: Select Period

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 . The My Tasks page is displayed.

   The list of projects awaiting your actions is displayed.

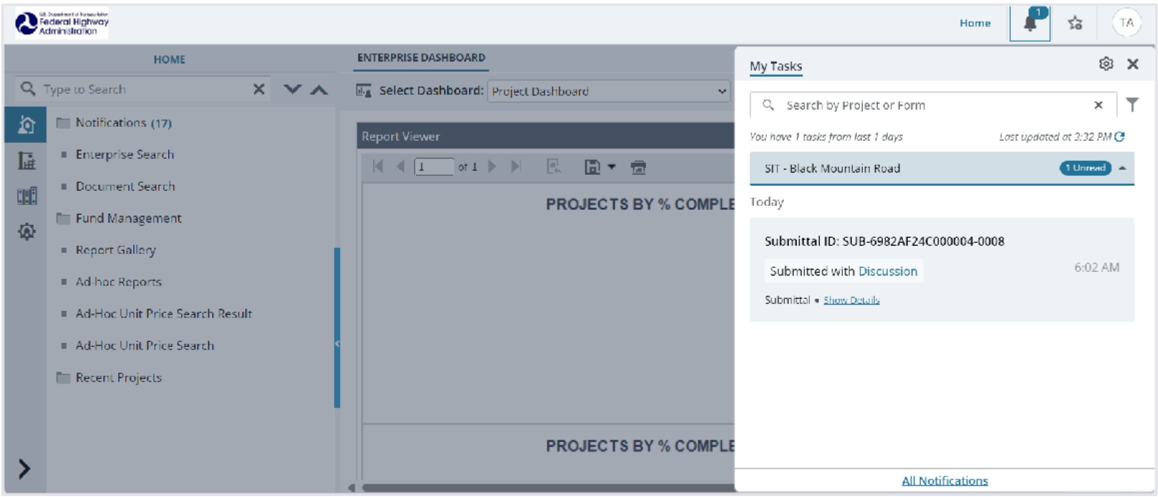


Figure 161: My Tasks

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**.

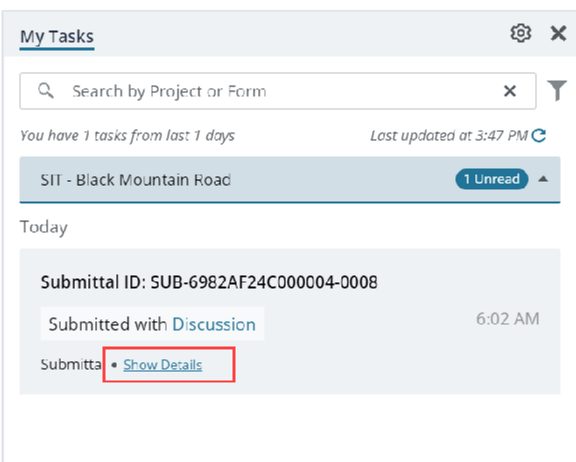


Figure 162: Show Details

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 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.

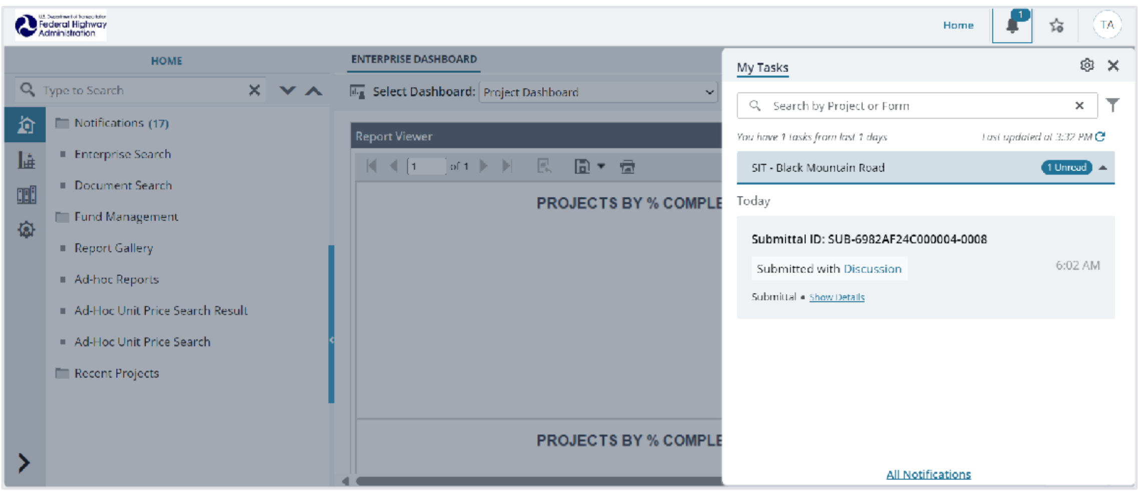


Figure 163: My Tasks

2. In the **My Tasks** page, click .
   The **CUSTOMIZE NOTIFICATIONS** page is displayed.

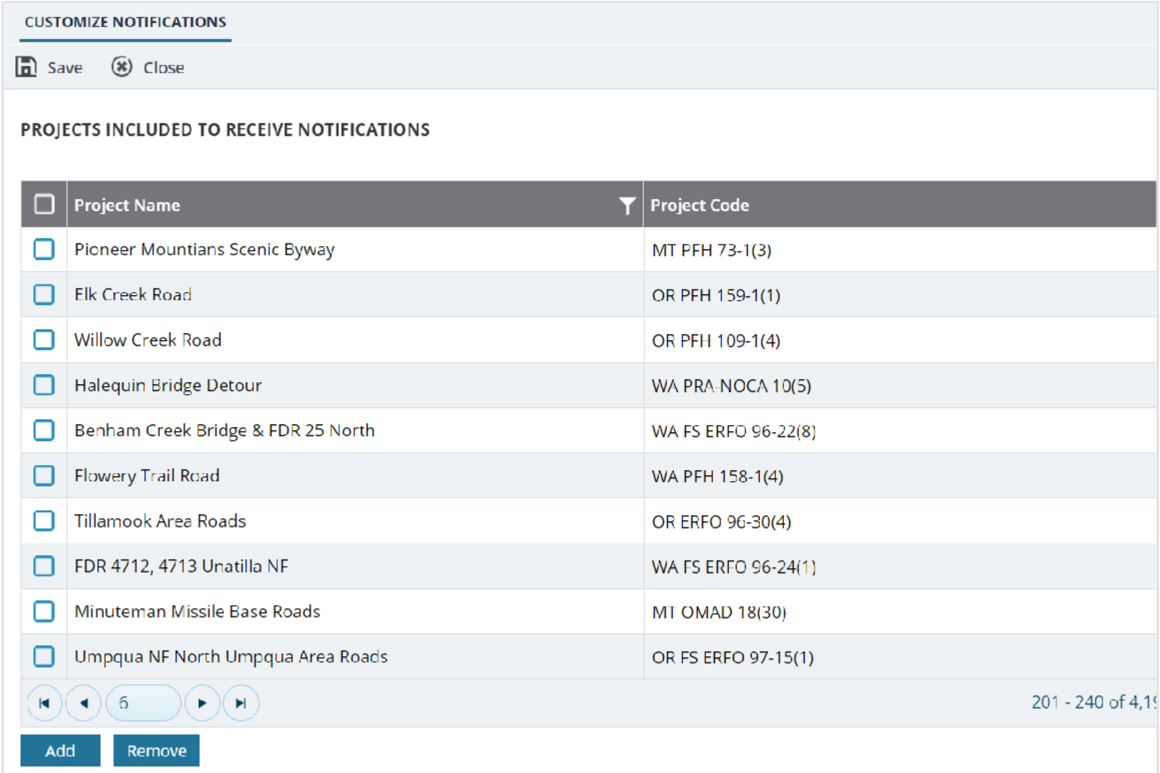


Figure 164: Customize Notifications

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.

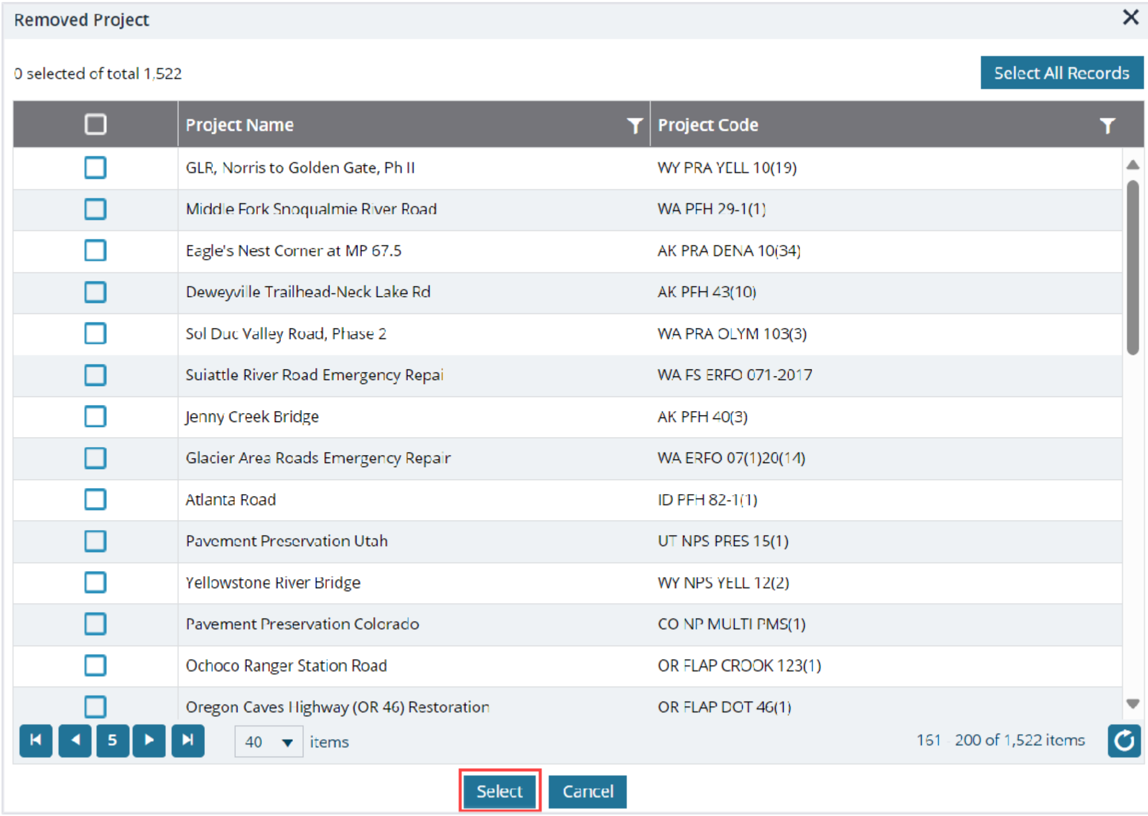


Figure 165: Removed Projects Dialog Box

   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.

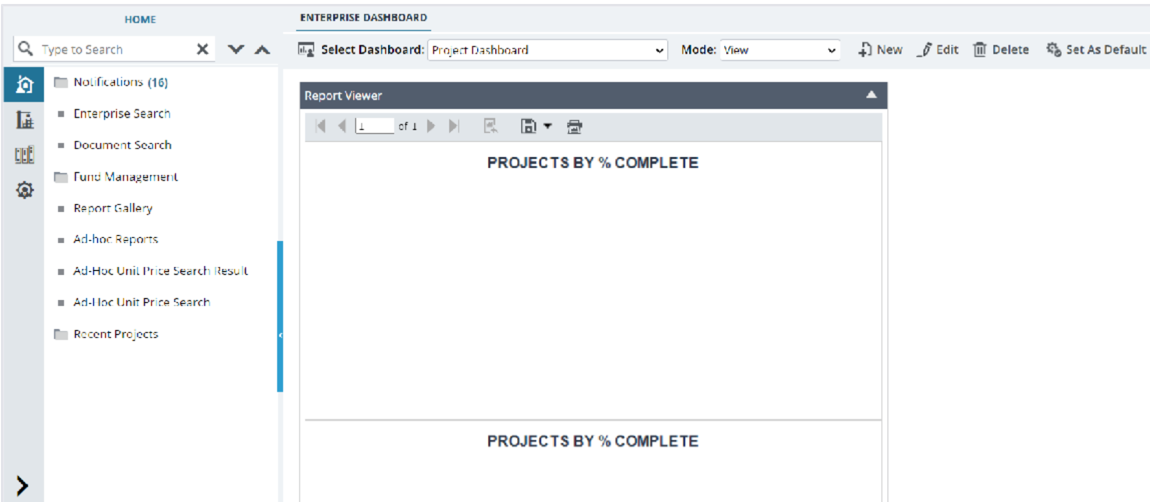


Figure 166: Enterprise Dashboard

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

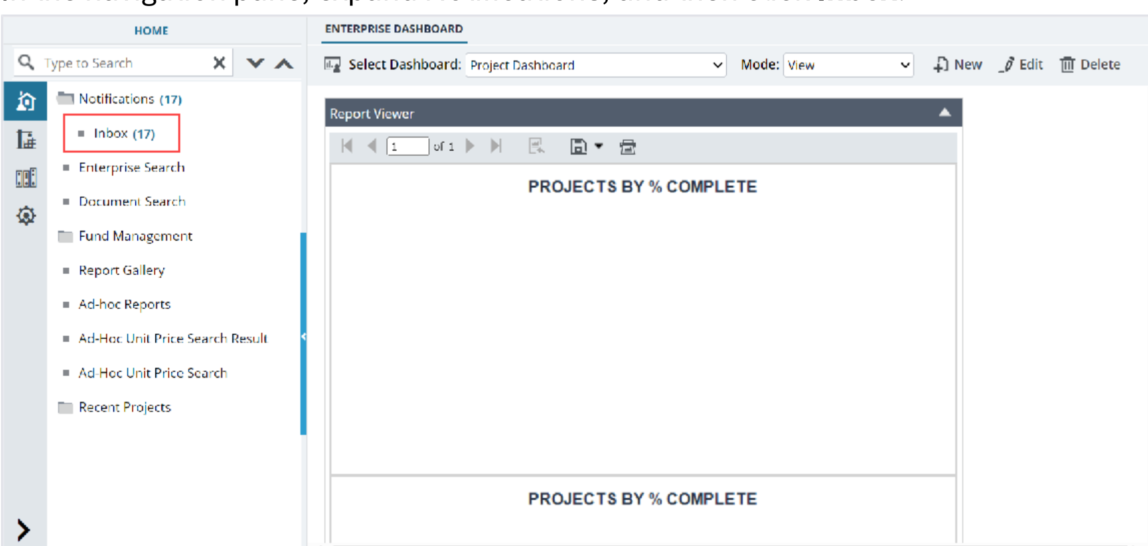


Figure 167: Inbox

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**.

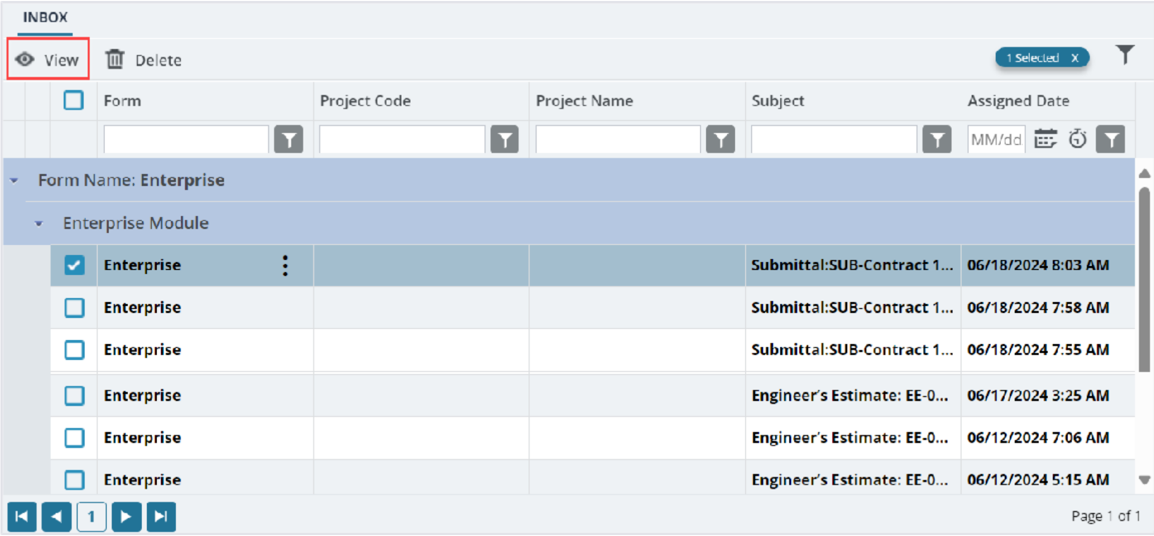


Figure 168: View Inbox

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.

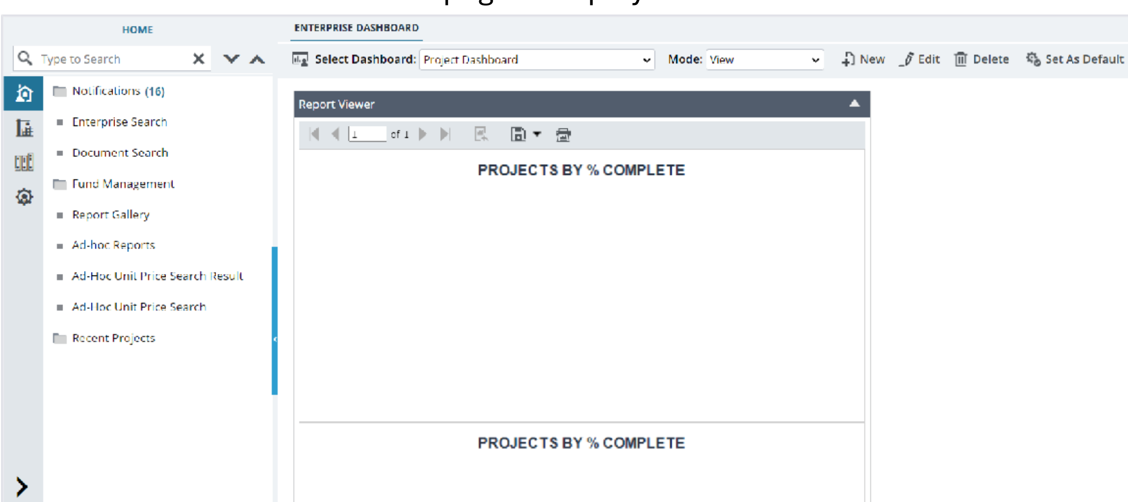


Figure 169: Enterprise Dashboard

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

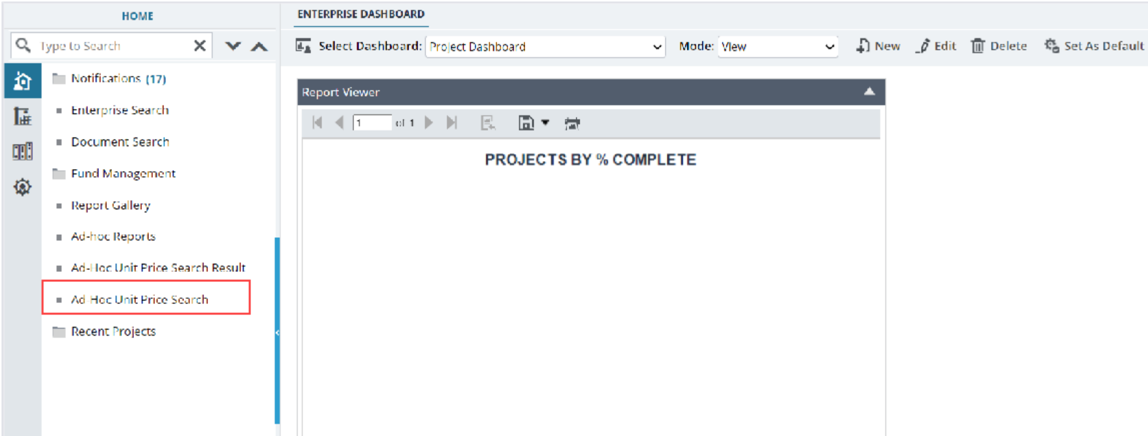


Figure 170: Navigation to Ad-hoc Unit Price Search Form

The **UNIT PRICE SEARCH** page is displayed.

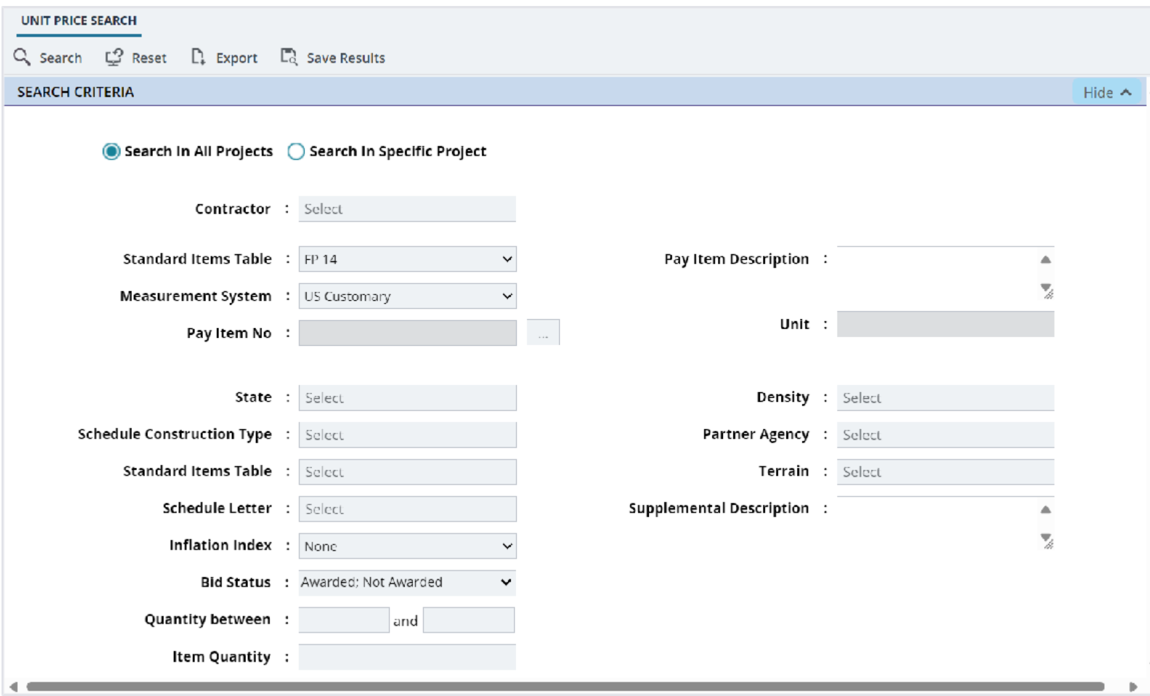


Figure 171: Unit Price Search

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 Projects or Search in Specific Project	Click any of the following options, as applicable: • **Search In All Projects**: To search unit price data in estimates and bids across all the projects in the application. • **Search in Specific Project**: To search unit price data in estimates and bids from a specific project.

Field Name	Description
Project Code	**Note**: This field is displayed only if the **Search in Specific Project** 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 **Public** 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 Table	By default, the latest standard items table defined in the **Standard Items Table** 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 System	By default, **US Customary** is displayed. Optionally, from the drop-down list, select the appropriate measurement system. Available options are measurement systems defined in the **Measurement Systems** catalog of the library.
Pay Item No	To select a pay item number, perform the following steps: 1. Click ... . The **Pay Item No** dialog box is displayed. Available options are standard items defined in the selected standard items table that is defined in the **Standard Items Table** 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 Construction Type	From the multi-select drop-down list, select the appropriate schedule construction types. Available options are schedule construction types defined in the **Schedule Construction Type** catalog of the library.

Field Name	Description
Standard Items Table	From the multi-select drop-down list, select the appropriate standard items 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 **Final Estimate** 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 **Density** 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 **Terrain** catalog of the library.
Supplemental Description	Enter any additional description specific to the pay item.
Quantity between	Enter the range of quantity in the consecutive two numeric fields. **Note**: The entered numbers must be greater than 0. Based on the numbers entered in the two numeric fields, the search result displays only those records where item quantity is within this range.
Bid Status	If 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
Records Selected	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 Price	The suggested unit price calculated based on the regression analysis for the item.
Average Unit Price in $	The average unit price calculated from the selected records.

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 Accessing the Ad-Hoc Unit Price Search Result.

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

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

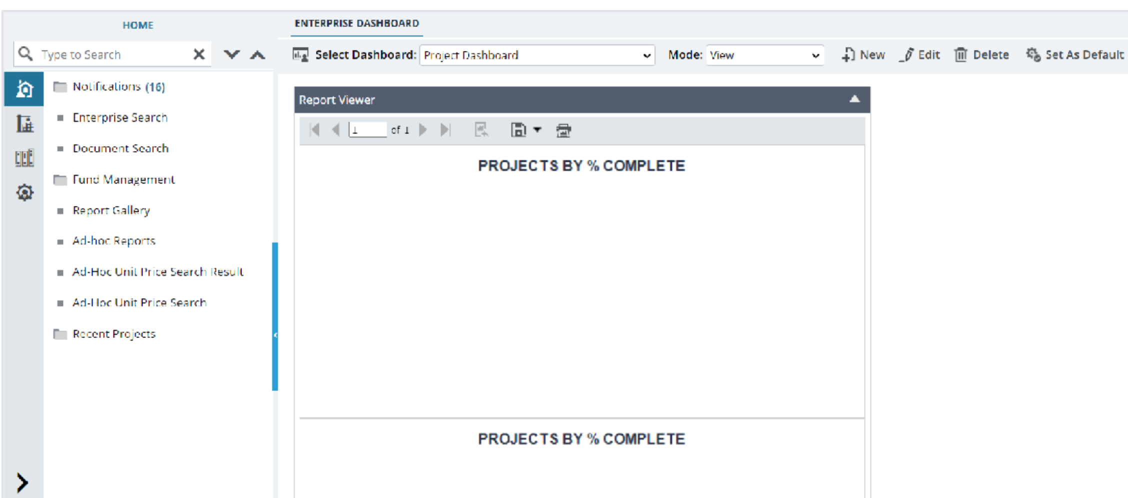


Figure 172: Enterprise Dashboard Page

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

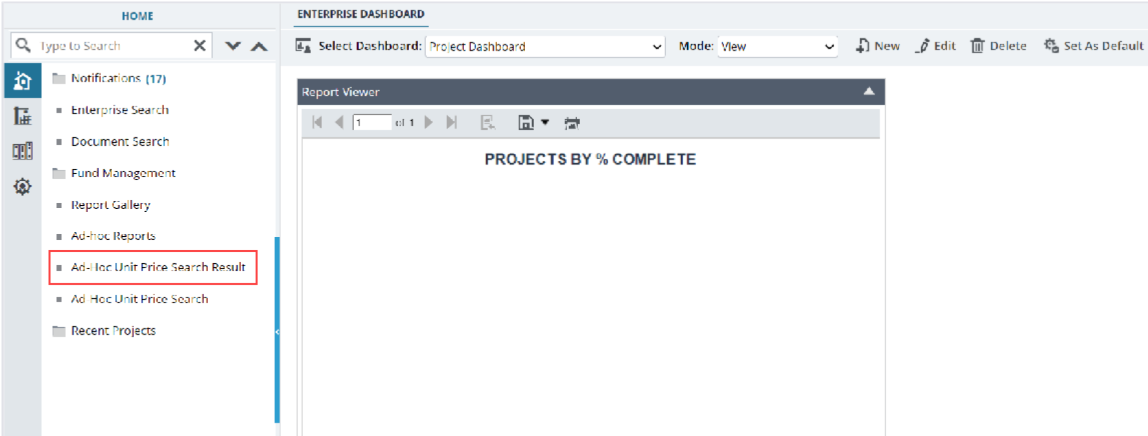


Figure 173: Navigation to Ad-Hoc Unit Price Search Result Form

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

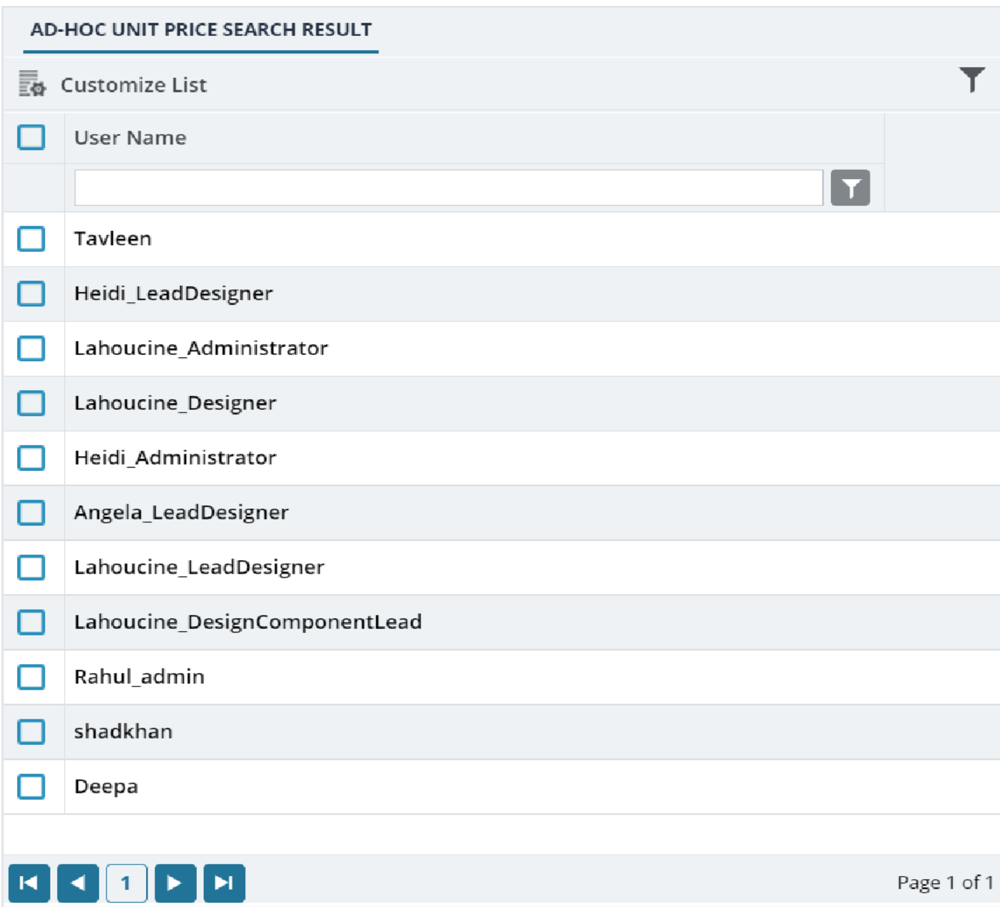


Figure 174: List Page of Ad-Hoc Unit Price Search Result

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

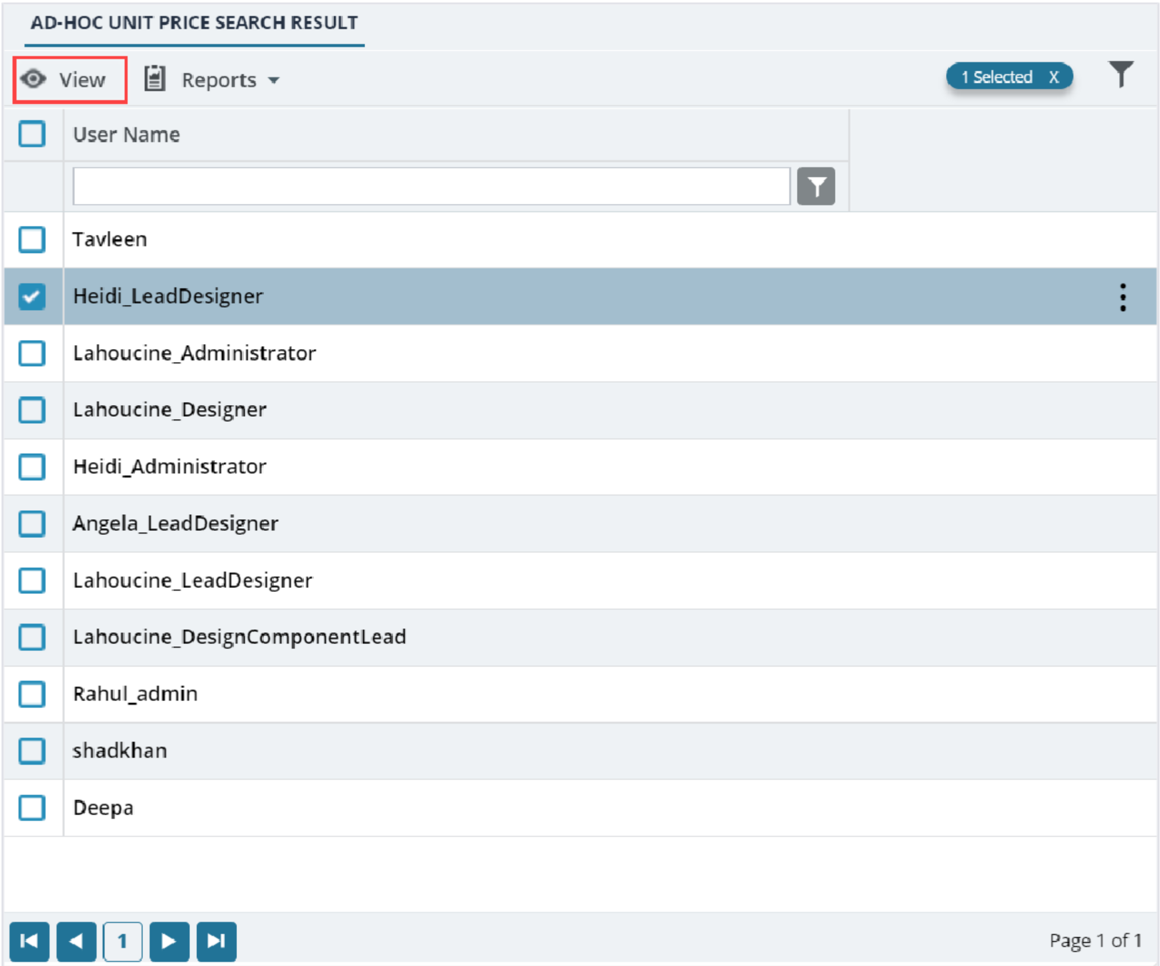


Figure 175: Selecting the Record to View

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

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

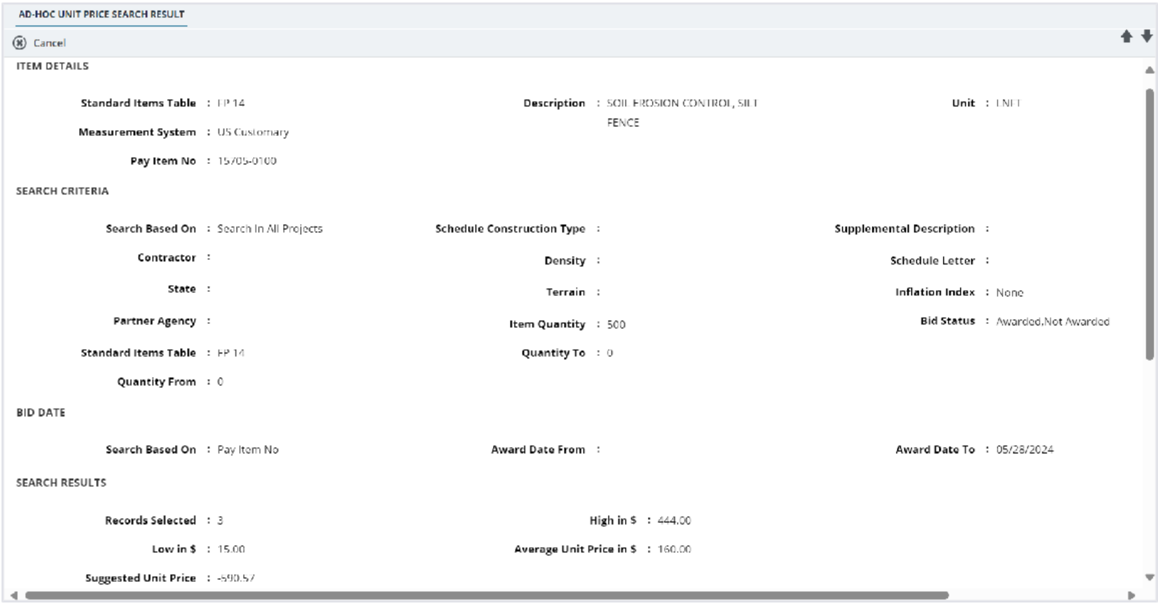


Figure 176: Ad-Hoc Unit Price Search Details Page

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.

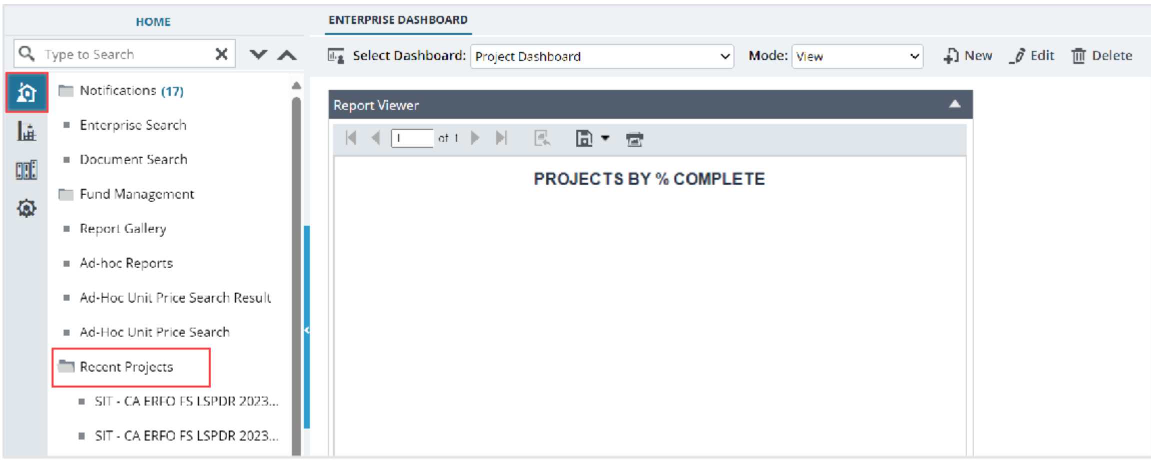


Figure 177: Recent Projects - Home Module

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:

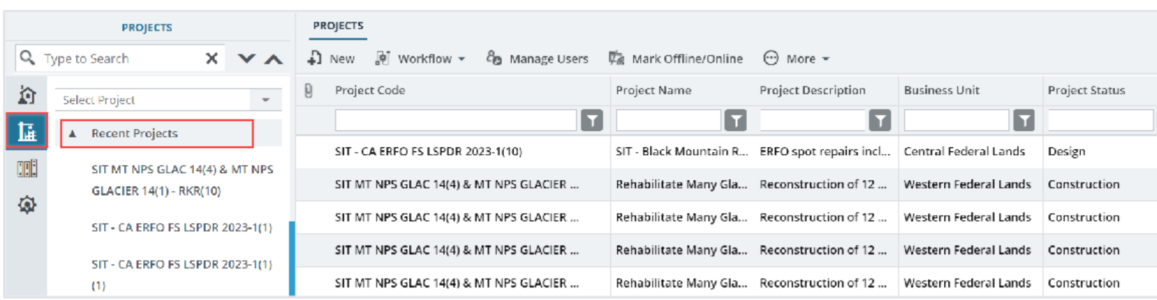


Figure 178: Recent Projects

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 pre-configured 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.

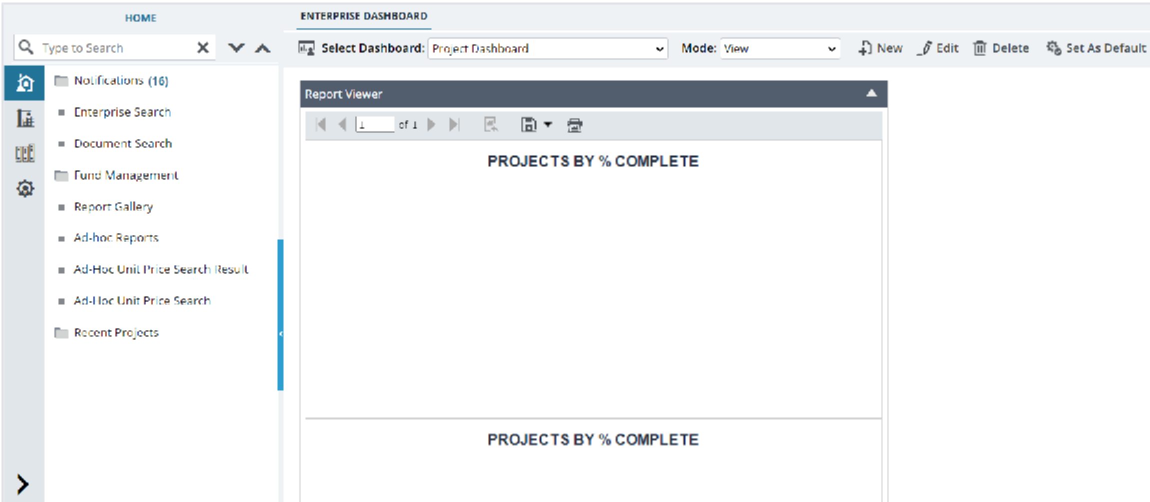


Figure 179: Enterprise Dashboard

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

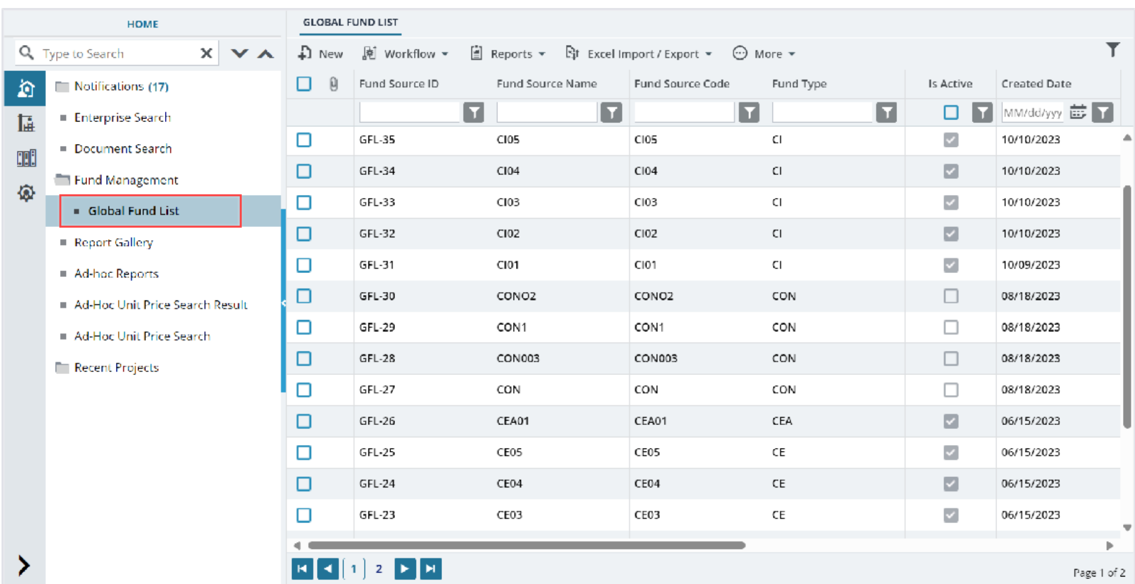


Figure 180: List Page of Global Fund List

3. Perform either of the following steps, as applicable:

- To generate the list page report, click **Reports**, and then click **List Page Report**.

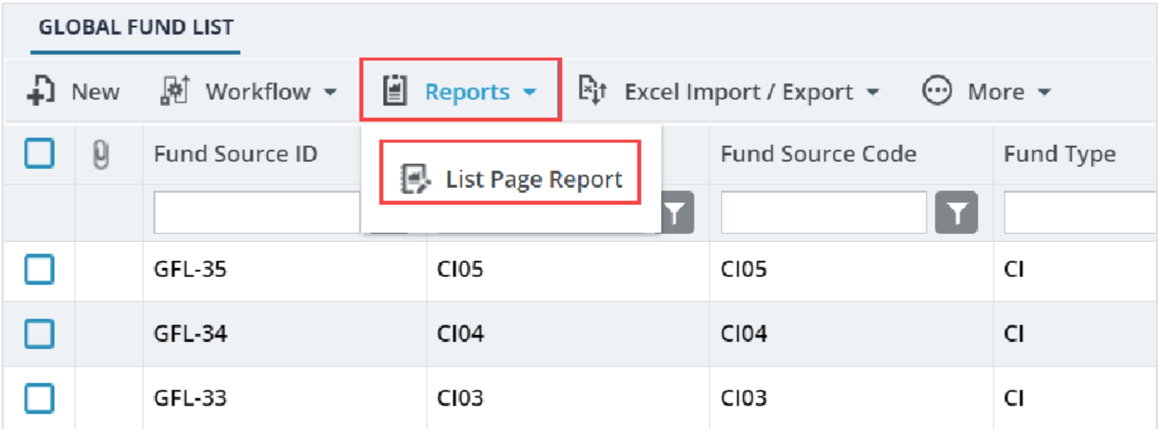


Figure 181: List Page Report

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

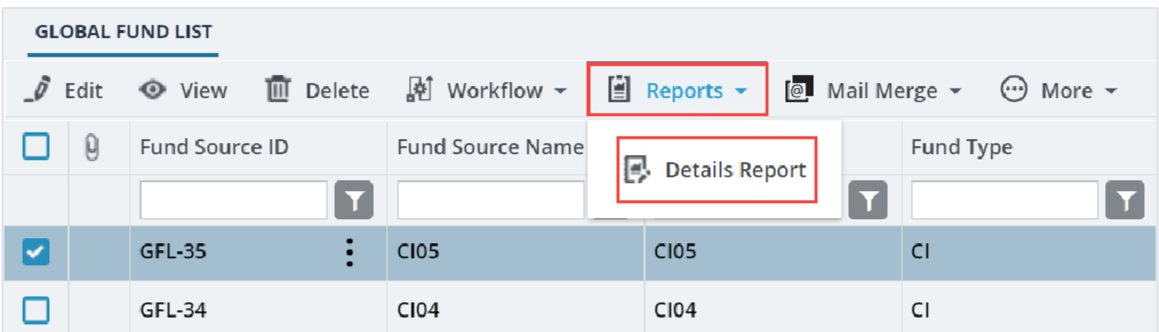


Figure 182: Details Page Report

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.

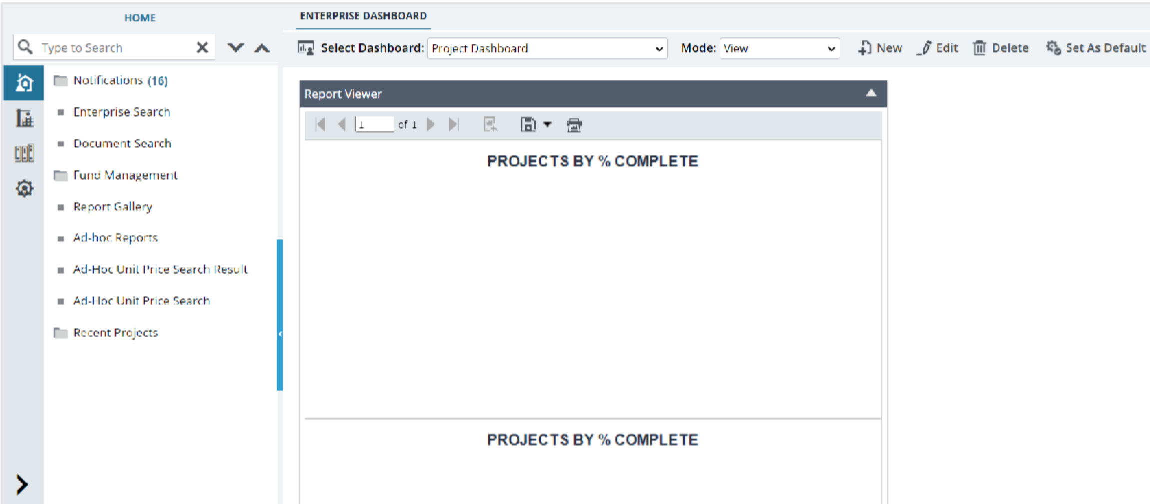


Figure 183: Enterprise Dashboard

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

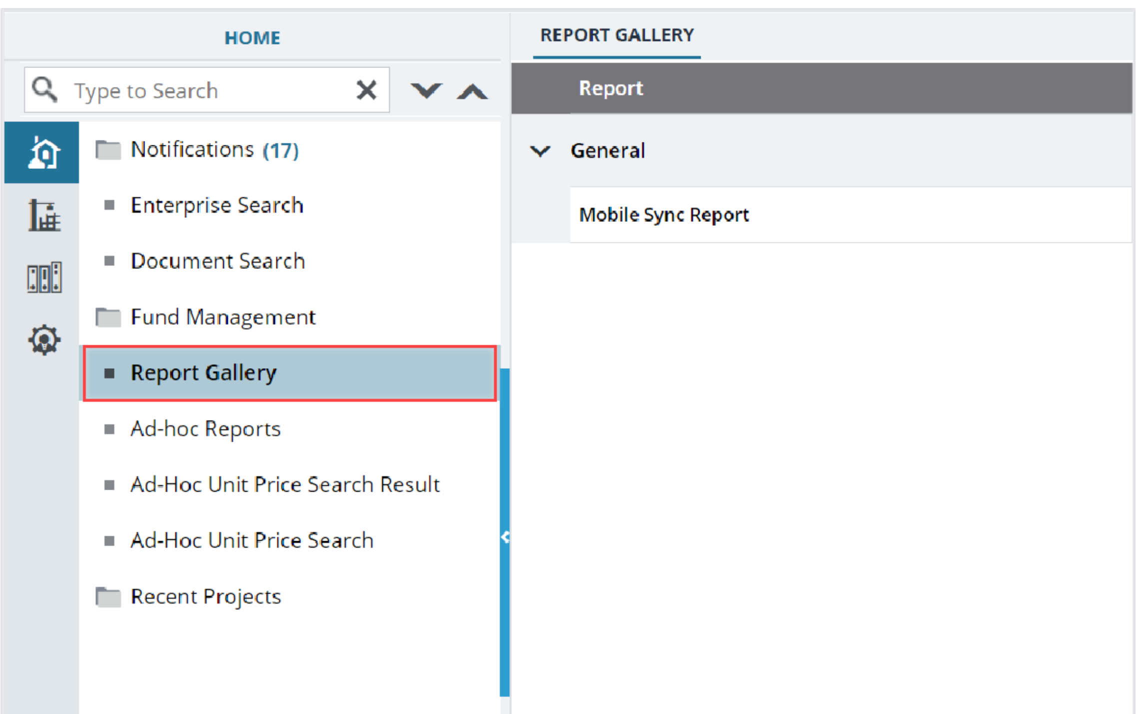


Figure 184: Enterprise Report Gallery

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

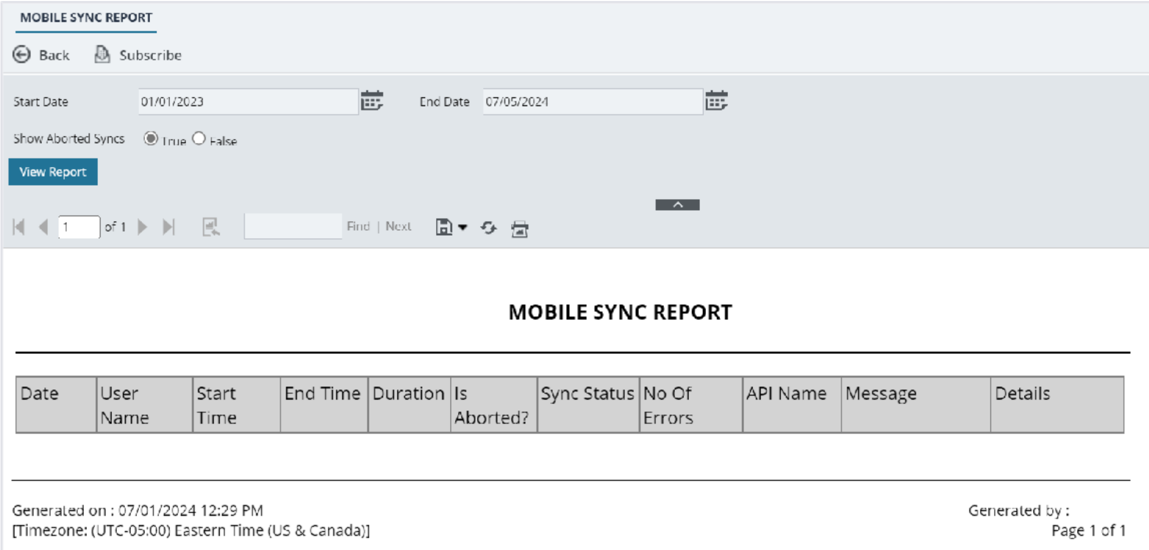


Figure 185: Mobile Sync Report

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
    - 8.3.1. Generating a report
    - 8.3.2. Printing a report
    - 8.3.3. Saving a report in various formats
    - 8.3.4. Updating report to view the latest information
- 8.3.5. Subscribing to a report

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.

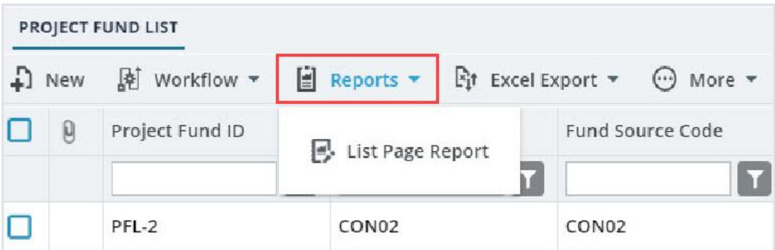


Figure 186: Using Reports Option

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

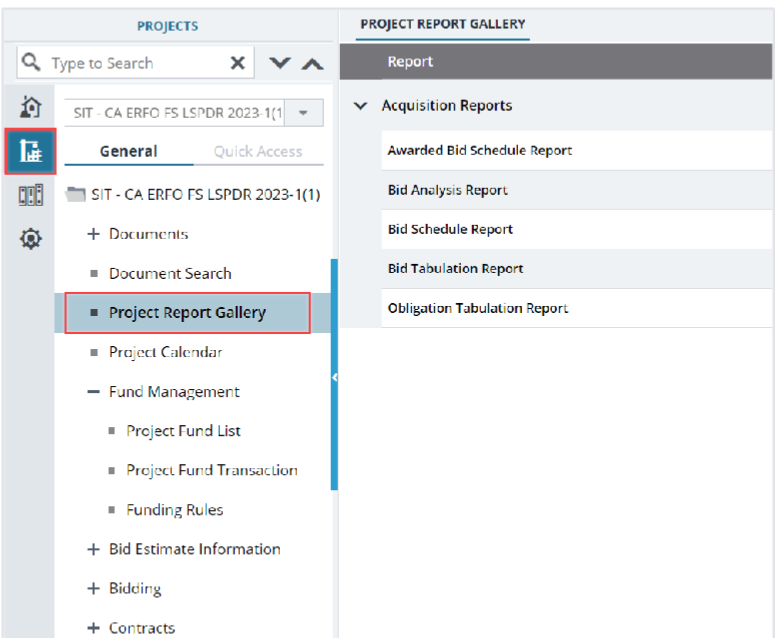


Figure 187: Project Report Gallery Navigation Page

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

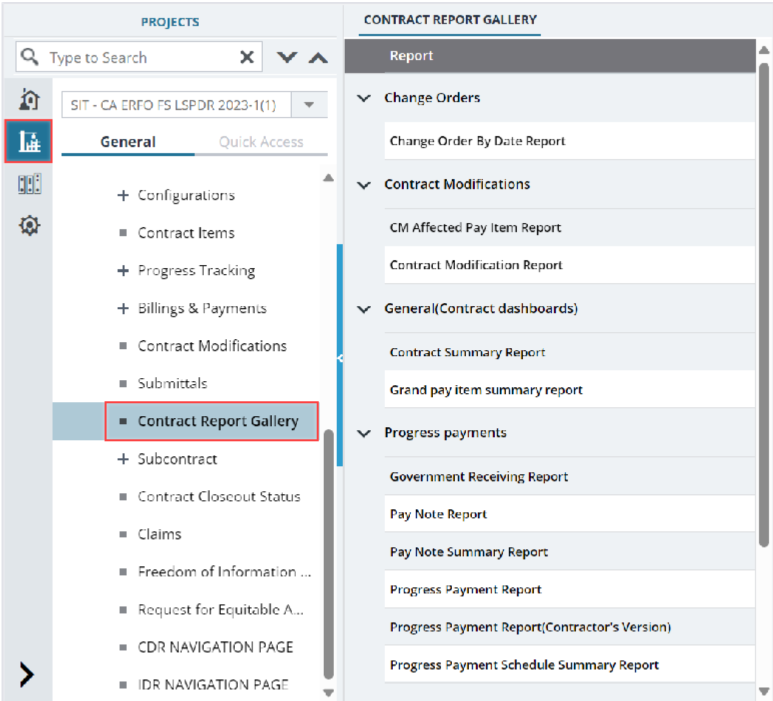


Figure 188: Contract Report Gallery Navigation Page

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

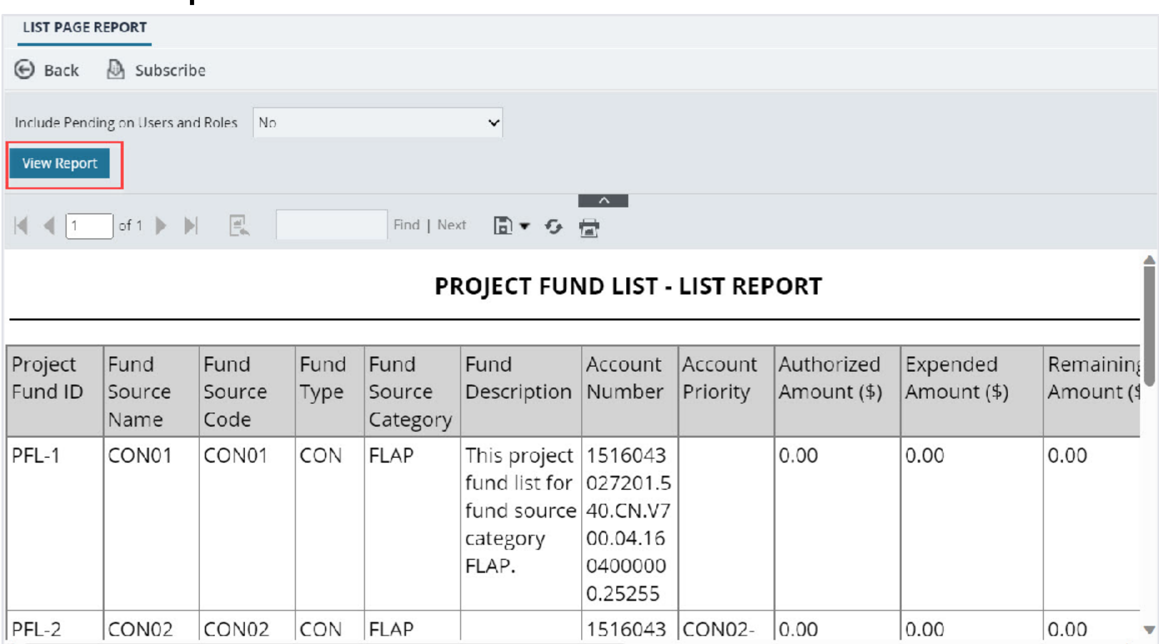


Figure 189: Using View Report Option

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**.

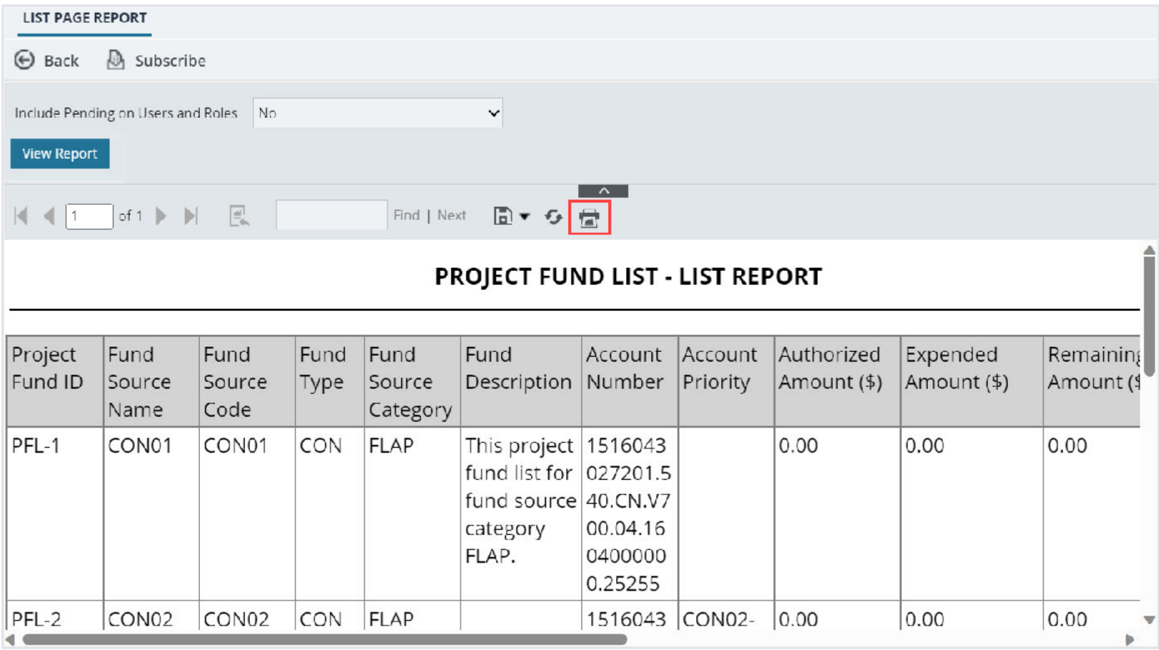


Figure 190: Using Print Report Option

8.3.3. Saving 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 **Export**, and then click the required option.

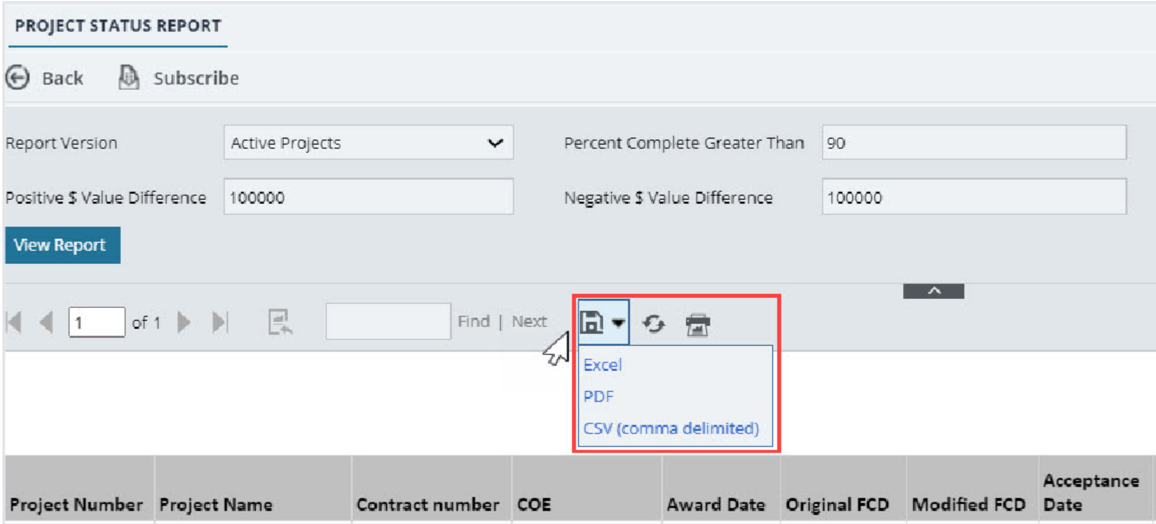


Figure 191: Exporting a Report

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** .

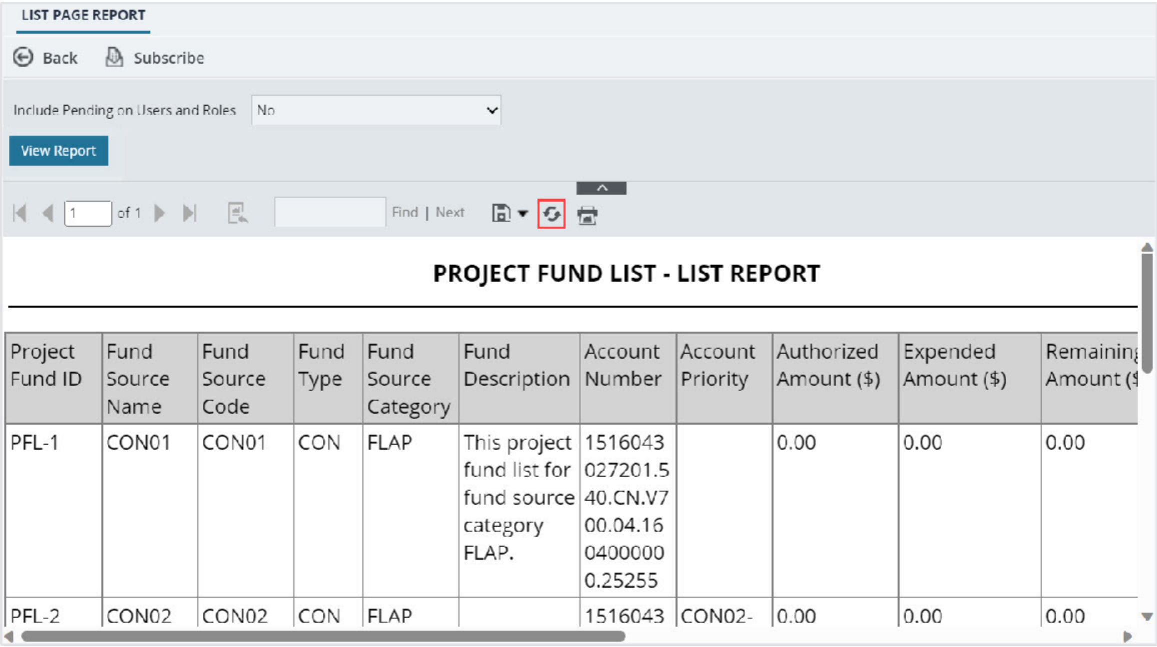


Figure 192: Using Refresh Option

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 .

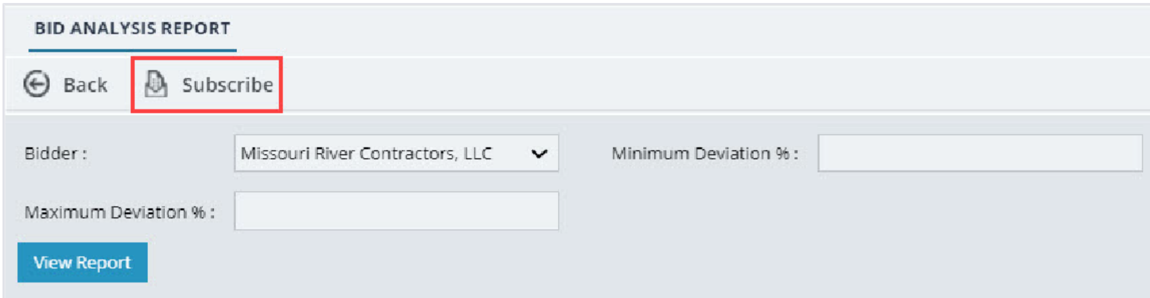


Figure 193: Subscribing a Report

The subscription dialog box is displayed.

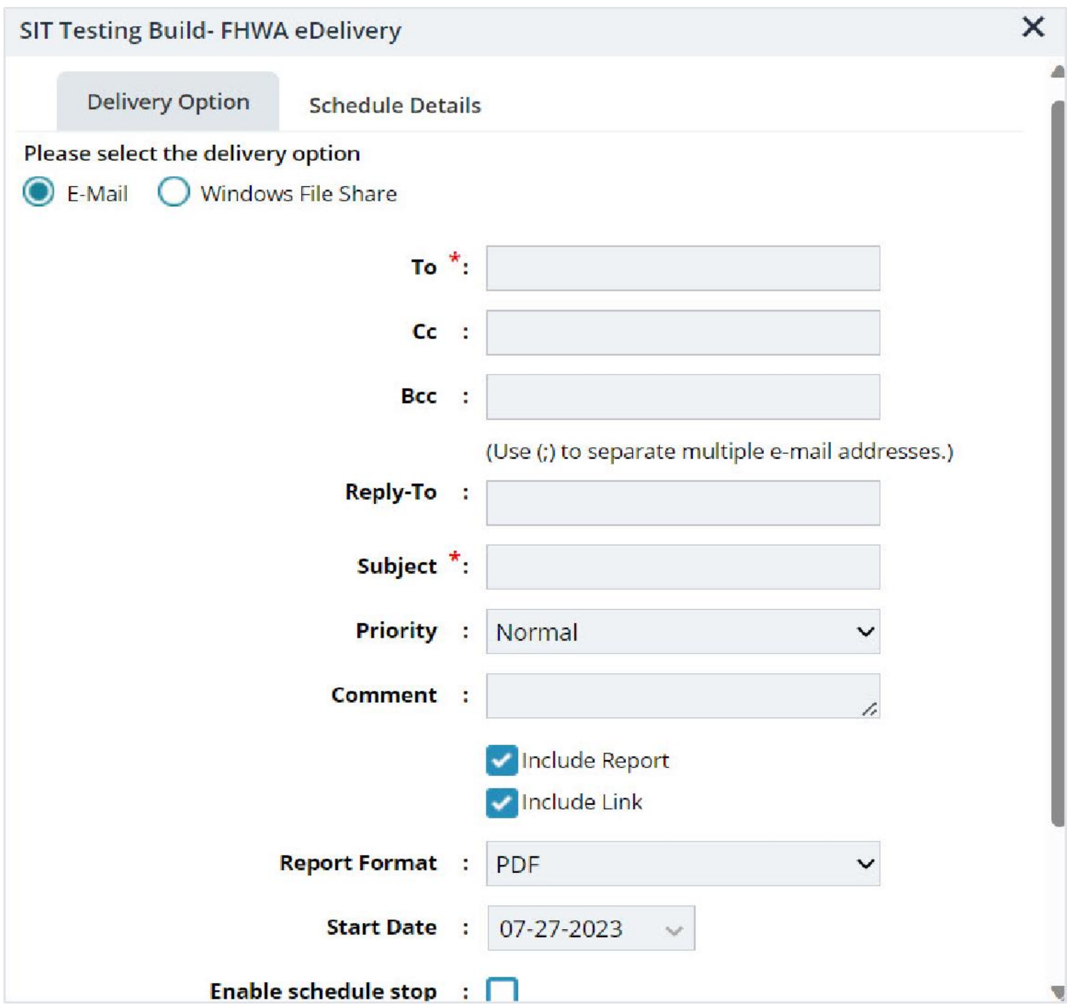


Figure 194: Subscription Dialog Box

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:

Email	Windows File Share
a. In the **To** box, enter the email addresses of the recipients of the report. b. In the **Reply-To** box, enter the email addresses of the recipients to whom the reply email must be delivered. c. In the **Subject** box, enter the name of the report or any other appropriate subject for the email. d. From the **Priority** drop-down list, select the priority of the email. If the selected priority is **High**, the email will be sent as a High Priority notification. e. In the **Comment** box, enter any comment for the email. Comments are included in the body of the email. f. Select the **Include Report** check box to deliver the report in the selected format as an email attachment. g. Select the **Include Link** check box to deliver the link to the report in the report delivery email. The recipient can view the report on the application only if the recipient has the required permissions on the report. h. From the **Report Format** drop-down list, select the format in which the report must be generated and delivered to the specified email addresses.	a. In the **File Name** box, enter the file name for the report. b. Select the **Add a file extension when the file is created** check box to save the report file name with the extension of the file format as required for the report. c. In the **Path** box, enter the path of the shared file location where the report must be saved. **Note**: To configure the shared file location in the application, you must provide the file path location to the Administrator. d. From the **Report Format** drop-down list, select the format in which the report must be generated and saved. e. In the **Credentials used to access the file share** section, enter the credentials to access the shared location and save the report. f. From the **Overwrite options** section, click any of the following options: • **Overwrite an existing file with a newer version**- When saving the report at the file location at the scheduled time, if a file with the same name exists, then the existing file is overwritten by the latest report. • **Do not overwrite the file if a previous version exists**- When saving the report at the file location at the scheduled time, if a file with the same name exists, then the report is not overwritten by the latest report, and the report is not saved at the file location. • **Increment file names as newer versions are added-** When saving the report at the file location at the scheduled time, if a file with the same name exists, then the latest report is saved with the same name appended with a sequential number. g. From **the Start Date** list, click the date from when the report must be saved.

Email	Windows File Share
i. From the **Start Date** list, click the date from when the report must be delivered. j. Select the **Stop this schedule on** check box, and then select the date until when the report must be delivered.	h. Select the **Stop this schedule on** check box, and then select the date up to when the report must be saved at the file location.

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

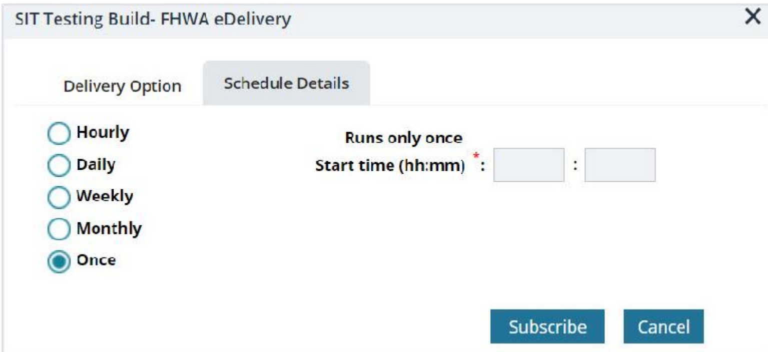


Figure 195: Schedule Details Tab

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

Option	Description	Steps
Hourly	The report is delivered every preset number of hours.	a. Click **Hourly** in the delivery options list. b. In the **Run the schedule every** section, enter the frequency of report delivery: i. In the **hours** and **minutes** boxes, enter the time period in hours and minutes the report must be periodically delivered. ii. In the **Start time** (hh:mm) box, enter the time (in 24-hour format) the report delivery must begin.
Daily	The report is delivered once on preset days, or periodically as defined.	a. Click **Daily** in the delivery options list. b. In the schedule definition section, enter the frequency of report delivery: • Click **Every Weekday** to get the report delivered on all weekdays, from Monday to Friday. • Click **Repeat after this number of 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
		• In the **Start time (hh:mm)** box, enter the time (in 24-hour format) the report must be delivered.
Weekly	The report is delivered every preset number of weeks on preset days of the week.	a. Click **Weekly** in the delivery options list. 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. c. In the **On day(s)** section, select the days on which the report must be delivered. d. In the **Start time (hh:mm)** box, enter the time (in 24-hour format) the report must be delivered.
Monthly	The report is delivered monthly on preset days of a selected week.	a. Click **Monthly** in the delivery options list. b. Select the months when the report must be delivered. c. Click one of the following options to schedule the delivery of the report: • **On week of the month** i. From the list of weeks, select the week the report must be delivered. ii. In the **On day(s)** section, select the days the report must be delivered in the week previously selected. • **On Calendar day(s)** ▪ 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 12th 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. d. In the **Start time (hh:mm)** box, enter the time (in 24-hour format) by when the report must be delivered.

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.

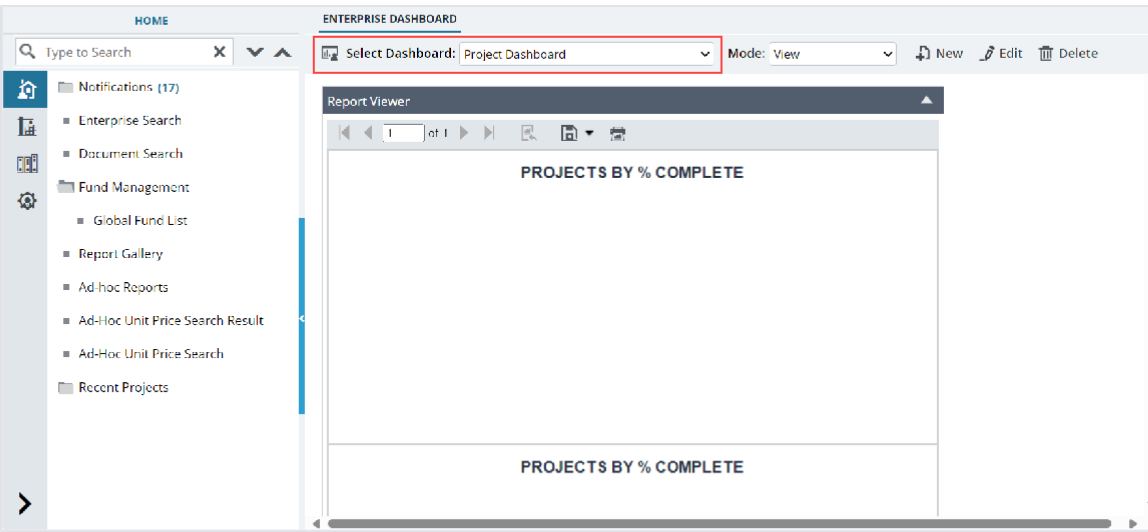


Figure 196: Select Dashboard - Home Module

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

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

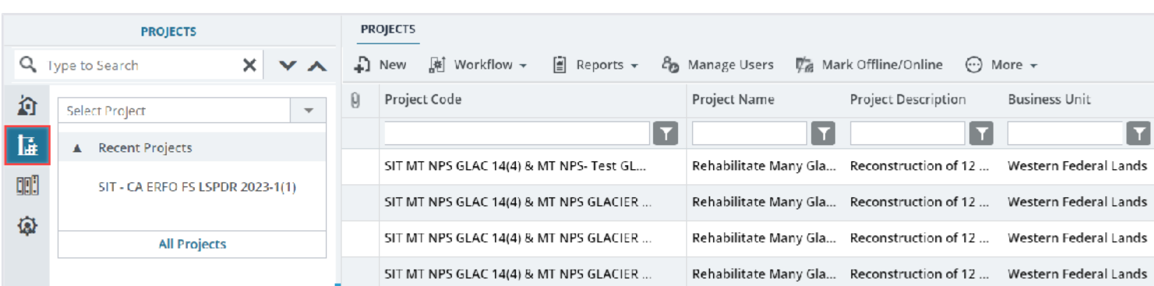


Figure 197: Projects List Page

2. Double-click the appropriate project.

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

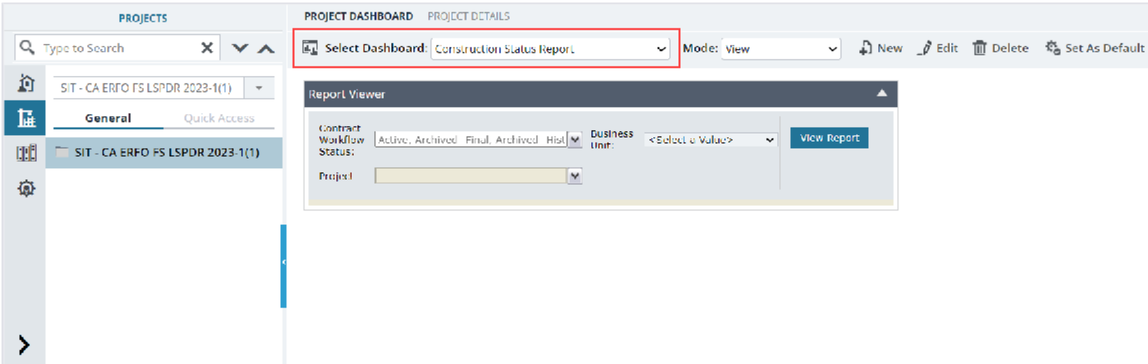


Figure 198: Select Dashboard - Projects Module

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

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

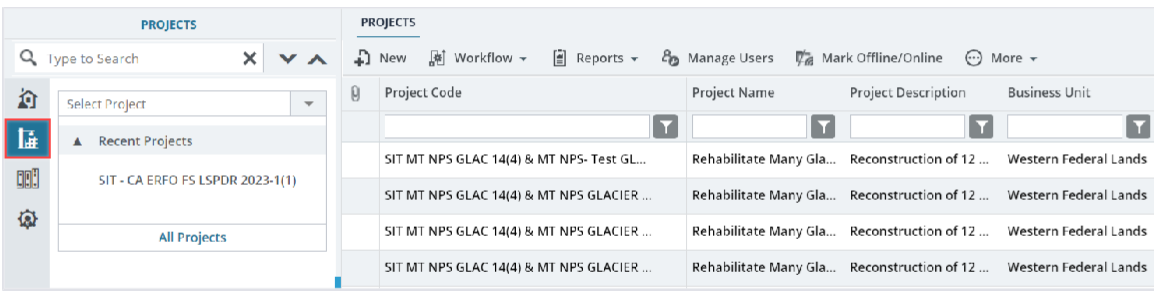


Figure 199: Projects List Page

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.

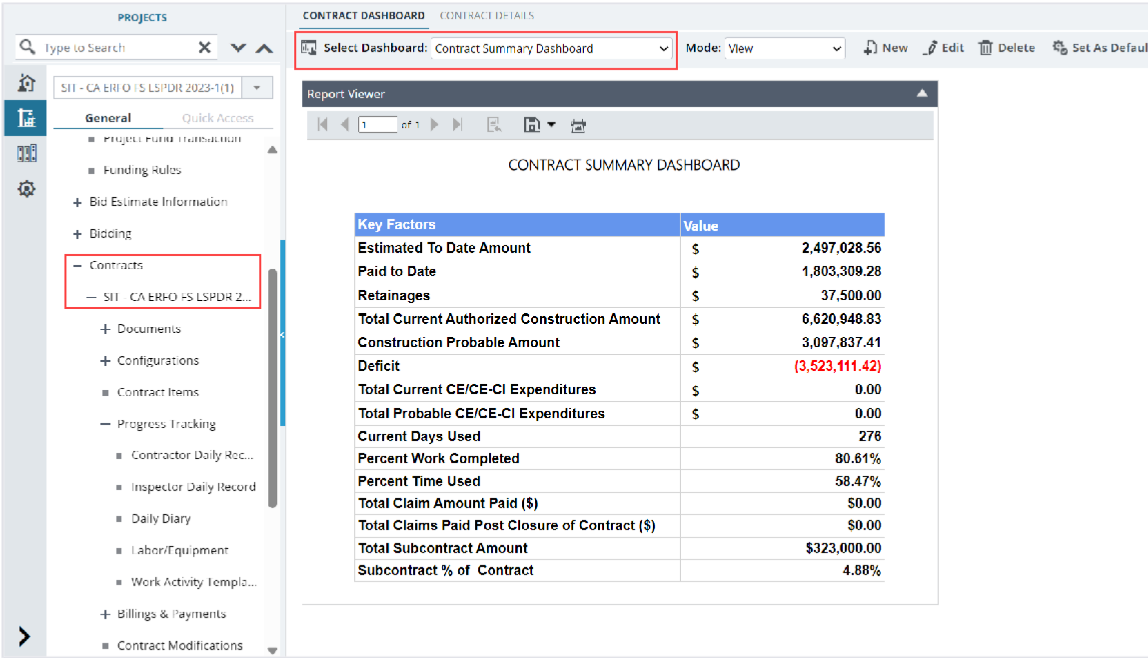


Figure 200: Select Dashboard - Contracts

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:

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

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

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

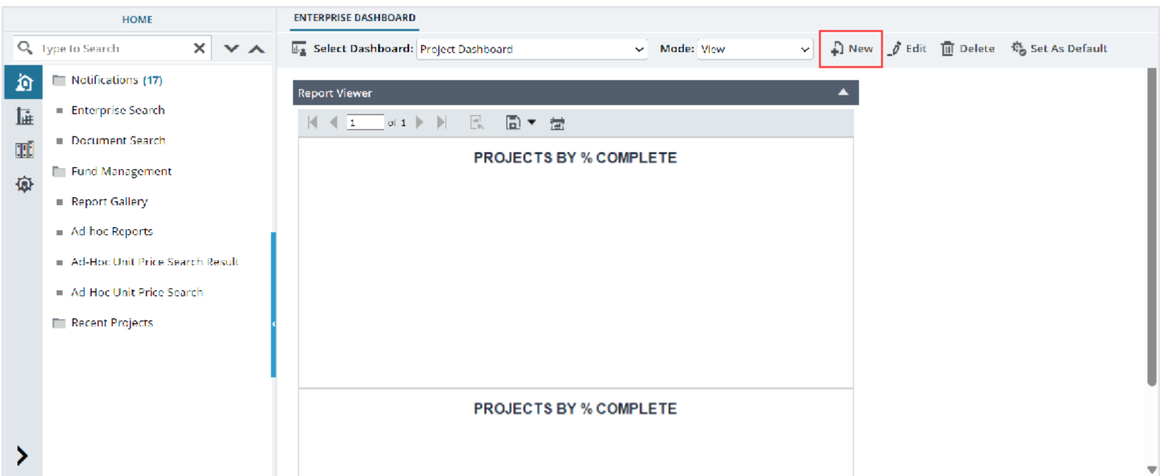


Figure 201: Enterprise Dashboard

The New Dashboard dialog box is displayed.

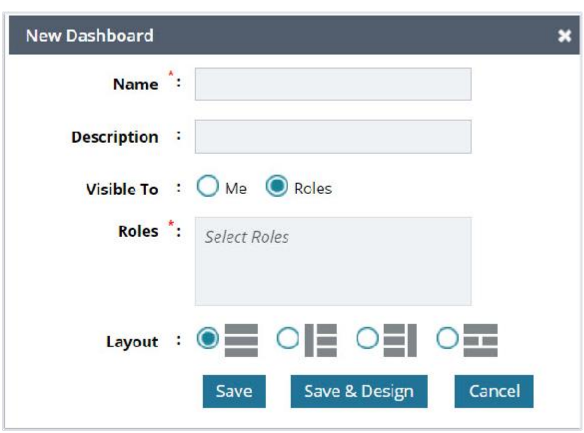


Figure 202: New Dashboard

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.
7. 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.

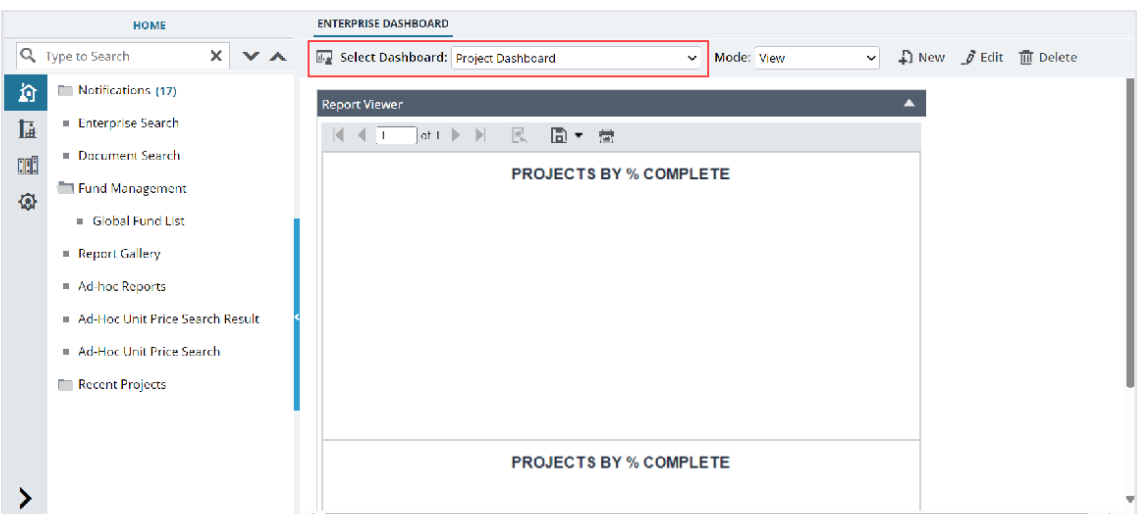


Figure 203: Selecting Dashboard

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

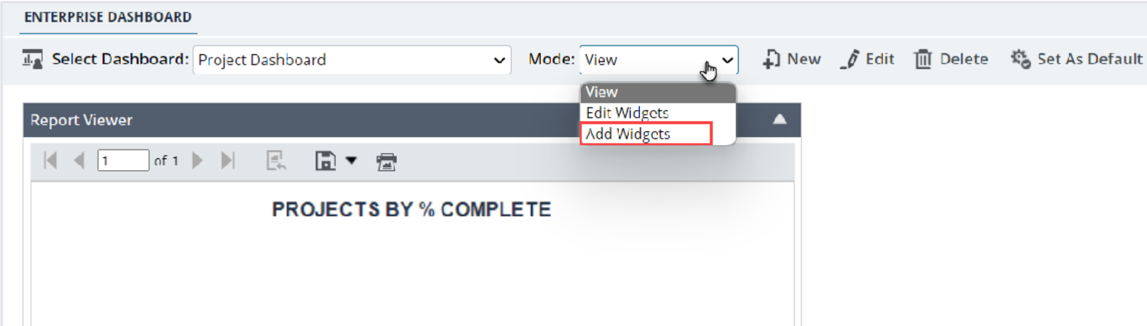


Figure 204: Mode - Add Widgets

The **Catalog Zone** section is displayed.

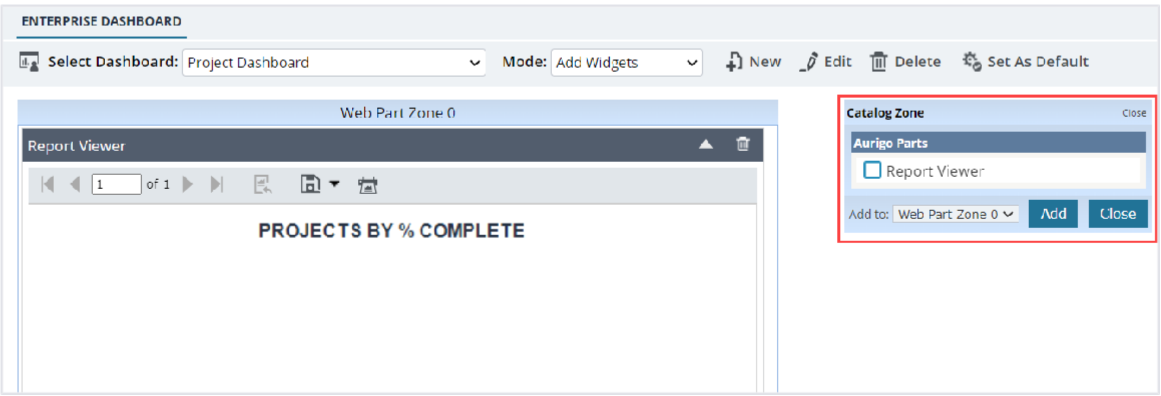


Figure 205: Adding Widgets

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.

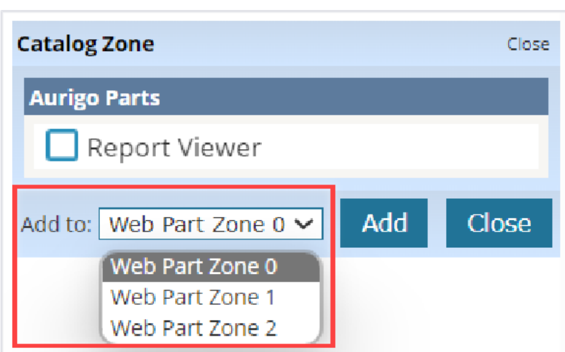


Figure 206: Add to - Web Part Zones

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.

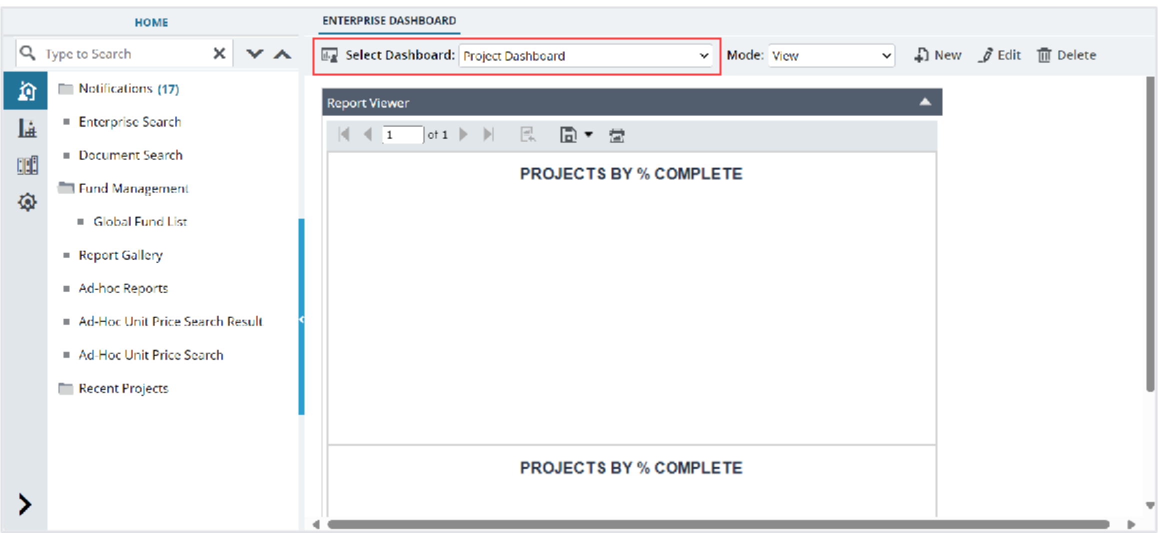


Figure 207: Select Dashboard

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

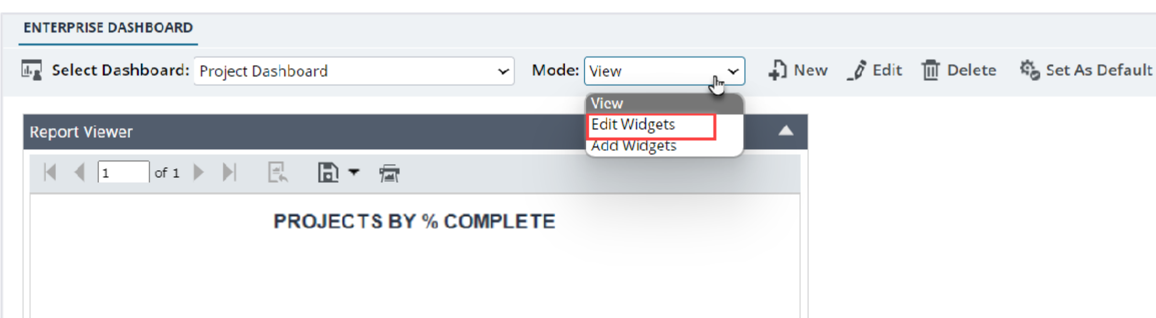


Figure 208: Mode - Edit widgets

The title bar menu options are displayed in the widget.

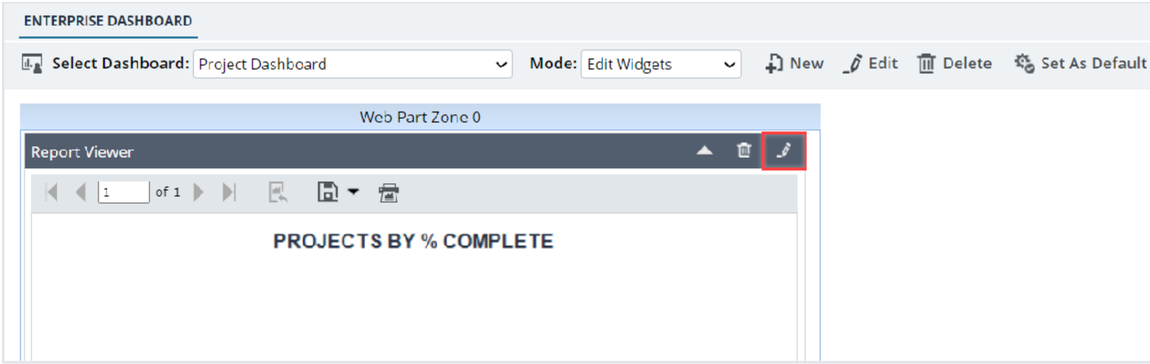


Figure 209: Title Bar Menu

4. Click **Edit**. The Editor Zone is displayed.

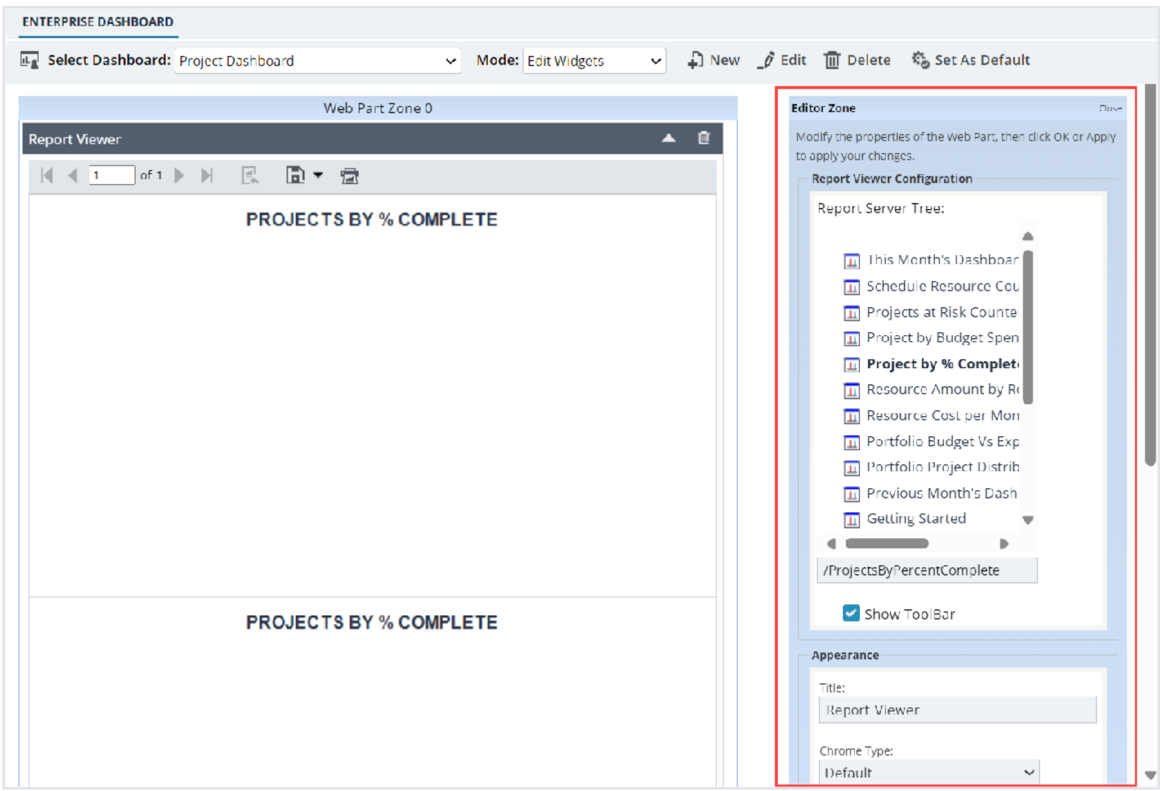


Figure 210: Editor zone

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.

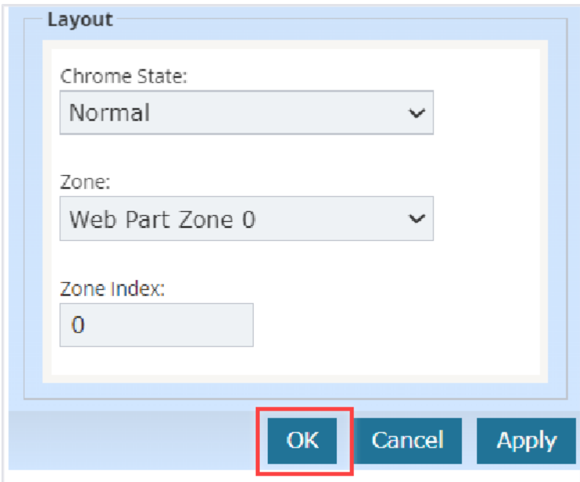


Figure 211: Apply the changes

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

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 view the dashboard.

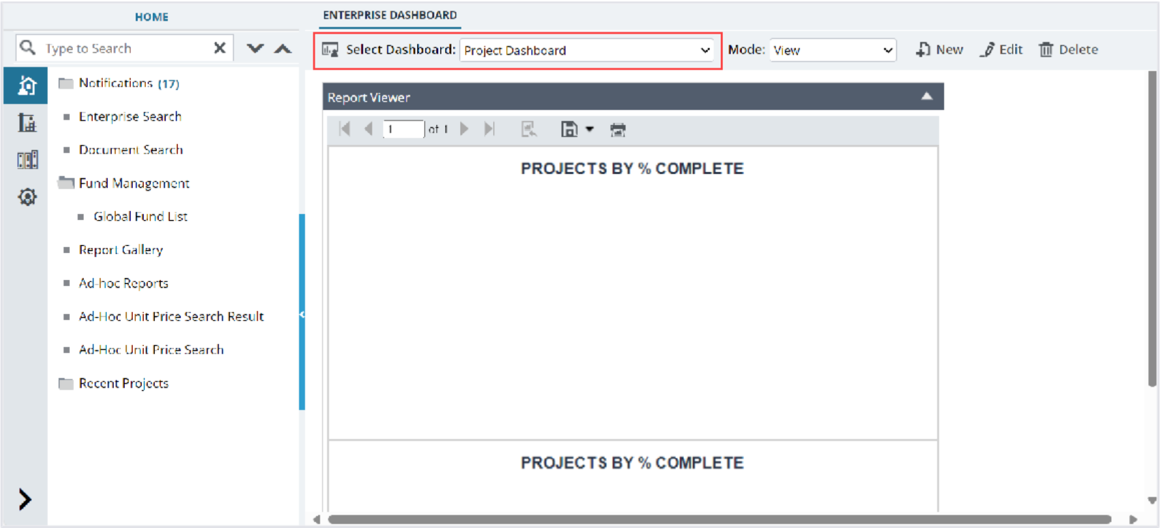


Figure 212: Select Dashboard

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**.

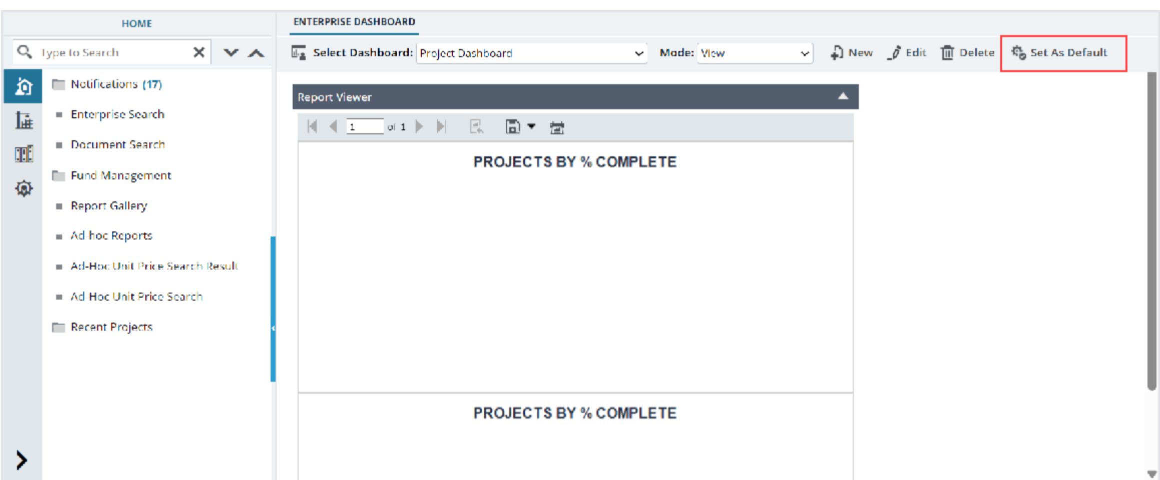


Figure 213: Set as Default

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**.

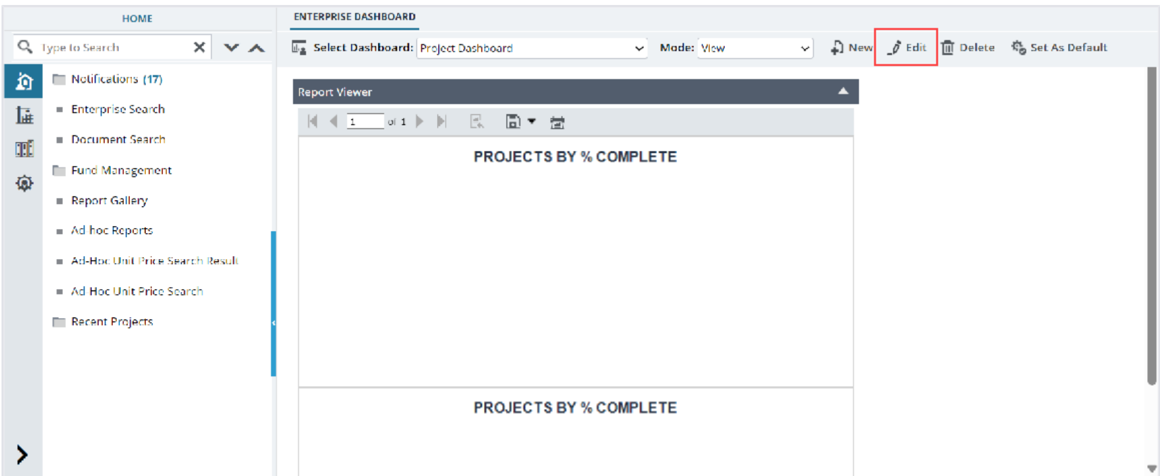


Figure 214: Edit

The **Edit Dashboard** dialog box is displayed.

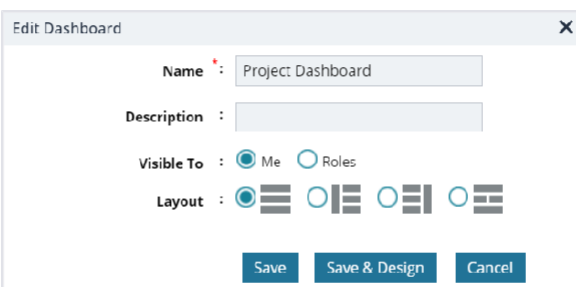


Figure 215: Edit Dashboard Dialog Box

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**.

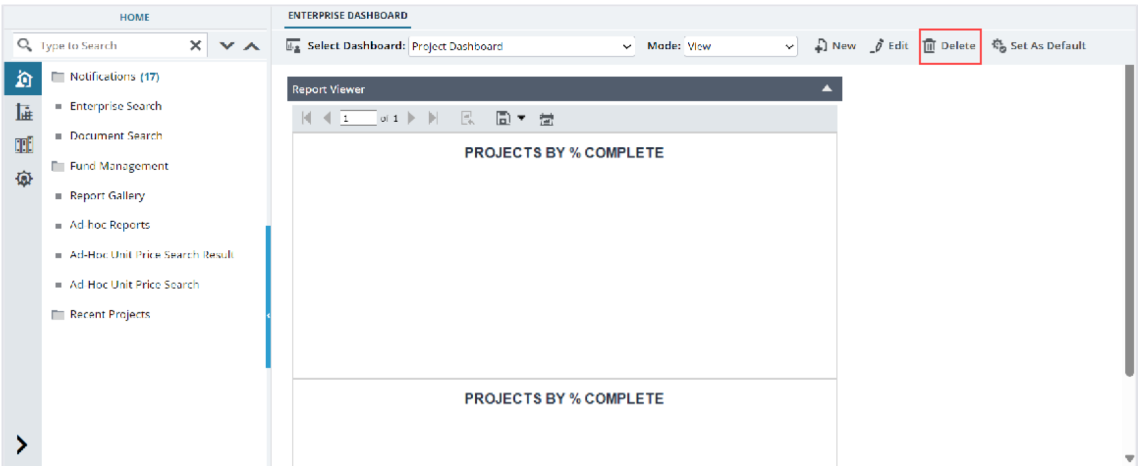


Figure 216: Delete Dashboard

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.