Construction Part B Participant Guide

# U.S. Department of Transportation Federal Highway Administration

Construction Part B Participant Guide



# Contents

1.	D	Disclaimer				
2.	In	Introduction to Using the Participant Guide5				
3.	С	ontrac	ct Modifications			
	3.1.	Cre	eating a Contract Modification7			
	3.2.	Ma	naging Contract Modification Items 18			
	3.	.2.1.	Creating a Container			
	3.	.2.2.	Adding Items to a Contract Modification24			
	3.	.2.3.	Adding Multiple Items to a Contract Modification 31			
	3.	.2.4.	Adding Sub Items			
	3.	.2.5.	Importing Schedule from Acquisitions			
	3.	.2.6.	Modifying Existing Item Quantity			
	3.	.2.7.	Modifying Sub Items			
	3.3.	Ар	proving a Contract Modification Record52			
	3.4.	Co	ntract Modifications Workflow Status55			
	3.5.	Ge	nerating Contract Modification Reports58			
4.	Арр	endix				
	4.1.	Attac	hments 61			
	4.	.1.1. A	ttaching a File to a Form			
	4.	.1.2. A	ttaching a File to a Workflow			
	4.	.1.3. A	ccessing and Downloading Attached Files73			
	4.	.1.4. D	eleting Attached Files			
	4.2.	Stand	lard Report Functions			
	4.	.2.1.	Generating and Viewing Reports			
	4.	.2.2.	Subscribing to Reports			
	4.	.2.3.	Unsubscribing to Reports			
	4.3.	Work	flow Status Transitions			
	4.	.3.1.	Performing a Workflow Action			
	4.	.3.2.	Viewing the Workflow History			
	4.	.3.3.	Selecting Workflow Users			

Federal Highwa	<b>Construction Part B</b>	
Administration		Participant Guide
4.3.4.	Associating a Workflow	105

# 1. Disclaimer

©Aurigo® Software Technologies Inc. All Rights Reserved.

While every reasonable precaution has been taken in the preparation of this document, Aurigo<sup>®</sup> Software Technologies Inc. does not assume responsibility for errors or omissions, or for damages resulting from the use of the information contained herein.

The software is provided strictly on an "as is" basis. All software furnished to the user is on a licensed basis. Aurigo® Software Technologies Inc. grants to the user a non-transferable and non-exclusive license to use the software program delivered hereunder (licensed program). Such license may not be assigned, sublicensed, or otherwise transferred by the user without prior written consent of Aurigo® Software Technologies Inc. No right to copy a licensed program in whole or in part is granted, except as permitted under copyright law. The user shall not modify, merge, or incorporate any form or portion of a licensed program with other program material, without written permission from Aurigo® Software Technologies Inc. The user agrees to maintain Aurigo® Software Technologies' copyright notice on the licensed programs delivered hereunder, and to include the same on any authorized copies it makes, in whole or in part. The user agrees not to decompile, disassemble, decode, or reverse engineer any licensed program delivered to the user or any portion thereof.

Aurigo<sup>®</sup> Software Technologies Inc. reserves the right to make changes to any software or product to improve reliability, function, or design.

Aurigo<sup>®</sup> Software Technologies Inc. does not assume any product liability arising out of, or in connection with, the application or use of any product, or application described herein.

No license is granted, either expressly or by implication, estoppel, or otherwise under any Aurigo® Software Technologies Inc., intellectual property rights.

Aurigo<sup>®</sup> Masterworks and all other Aurigo<sup>®</sup> Software Technologies, Inc., product or service names are registered trademarks or trademarks of Aurigo<sup>®</sup> Software Technologies, Inc. in the USA, Canada and other countries.

Other brand and product names are trademarks of their respective companies.

Aurigo<sup>®</sup> Software Technologies Inc.

www.aurigo.com

# 2. Introduction to Using the Participant Guide

The Participant Guide helps you get started with the process of creating a contract modification and quickly navigate through the various key processes of contract modifications.

The options selected for use in this guide are for instructional purposes to showcase the entire lifecycle of Contract Modification. Field selections, other than the ones used in this guide, could possibly lead to a varied workflow and may not be covered in this guide. For additional information on the application, refer to the User Guide or Masterworks Online Help available with the application.

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

# **3. Contract Modifications**

Contract Modifications (CM) is an instrument of agreement between FHWA and the contractor for modifications to the contract. FHWA and the contractor mutually agree to the changes in quantities of existing items, additions of new items, changes in funding obligations, and modifications to the contract duration.

You create a contract modification for the following purposes:

- Revision in item quantities
- Item over-runs and under-runs
- Addition of newly identified items
- Change in funding obligations
- Change in contract duration

Additionally, at the end of the contract, you can create balance contract modifications to adjust any remaining quantities for all contract items. For more information on balance contract modifications, refer to **Construction Contracts – Part C Participant Guide**.

The functional flow for the **Contract Modifications** module is as follows:

- 1. <u>3.1. Create a contract modification record.</u>
- 2. <u>3.2. Manage contract modification items.</u>
- 3. <u>3.3. Approve a contract modification record.</u>

# **Contract Modifications Permission Matrix**

This section provides information on the roles and corresponding permissions for the **Contract Modifications** form.

Role	Create	Edit	View	Delete	Audit Log
Administrator	Yes	Yes	Yes	Yes	Yes
Construction	Yes	Yes	Yes	Yes	Yes
Component					
Lead					
Construction	Yes	Yes	Yes	Yes	Yes
Admin Staff					
Construction	Yes	Yes	Yes	-	-
Engineer					
Highway	-	-	Yes	-	-
Construction					
Manager/QAQC					
Construction	Yes	Yes	Yes	Yes	-
Operations					
Engineer					
Inspector	-	-	Yes	-	-

Role	Create	Edit	View	Delete	Audit Log
Assistant	Yes	Yes	Yes	-	-
Project					
Engineer					
Project	Yes	Yes	Yes	Yes	-
Engineer					
Regional	Yes	Yes	Yes	Yes	-
Engineer					
Construction	-	-	Yes	-	-
Inspection A&E					
Manager					
Inspector A&E	-	-	Yes	-	-
Assistant	Yes	Yes	Yes	-	-
Project					
Engineer A&E					
Project	Yes	Yes	Yes	-	-
Engineer A&E					

# 3.1. Creating a Contract Modification

# Prerequisites

- Contract items are locked.
- Approved fund sources must be available.
- An approved Final Pay Estimate record is not available for the contract.
- The role of the logged-in user must be one of the following:
  - Administrator
  - Construction Component Lead
  - o Construction Admin Staff
  - Construction Engineer
  - Construction Operations Engineer
  - Assistant Project Engineer
  - Project Engineer
  - Regional Engineer
  - Assistant Project Engineer A&E
  - Project Engineer A&E

For more information on role-specific permissions, refer to <u>Contract Modifications Permission</u> <u>Matrix.</u>

## Overview

Based on the types defined in the **Contract Modification Type** catalog of the library, the **Contract Modifications** form enables you to modify the scope of the contract.

While creating a contract modification, in the **Contract Modification** form, you have the following options:

- **New Contract Modification**: This is used to make changes in quantities of existing items, additions of new items, changes in funding obligations, and modifications to the contract duration.
- **New Balance Modification**: This is used to update item quantities at the end of the contract to adjust any remaining quantities for all contract items.

## Steps

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

PROJECTS			DJECTS			
۹	Type to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🗸 📋 Reports 🛪 🗞	Manage Users 🛛 🎼 Ma	irk Offline/Online 💮 N	lore 🔻
	Select Project	0	Project Code	Project Name	Project Description	Business Unit
15				T	T	T
Ш#	Recent Projects		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
E D P	SIT - CA ERFO FS LSPDR 2023-1(1) All Projects			nemosine te many stam		
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
<u>{</u> \$}			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands

Figure 1: Navigation to Projects Module

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



Figure 2: Expanding Projects Folder

#### Federal Highway Administration

3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 3: Navigation to Contracts

4. Click Contract Modifications.

The **CONTRACT MODIFICATIONS** list page is displayed.

	PROJECTS	CONTRACT MODIFCIATIONS	
٩	Type to Search X X	🖡 New 👻 🖟 Workflow 👻 🖆 Reports 👻 💬 More 👻	
	SIT - CA ERFO FS LSPDR 2023-1(1)	New Contract Modification	Amount in \$
1.a	General Ouick Access	New Balance Contract Modification	
	- Contracts	in contract time 05/01/2024	0.00
		2   Residential Housing   04/29/2024	0.00
۹	- SIT - CA ERFO FS LSPDR 2023	1 Award Additional Schedule 04/29/2024	3,857,075.50
	+ Documents		
	+ Configurations		
	<ul> <li>Contract Items</li> </ul>		
	+ Progress Tracking		
	+ Billings & Payments		
	Contract Modifications		
	<ul> <li>Submittals</li> </ul>		
	<ul> <li>Contract Report Gallery</li> </ul>		
	+ Subcontract		
	Contract Closeout Status		
	Claims		

Figure 4: List Page of Contract Modifications Form

#### Federal Highway Administration

5. Click **New**, and then click **New Contract Modification**.

The **CONTRACT MODIFICATION DETAILS** page is displayed.

CONTRACT MODIFICATION DETAILS	CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS			
🚡 Save & Exit 🛛 🚡 Save & Continu	ie 🛞 Cancel 📑 Workflow	✓ *2* Select Actions		
GENERAL				
CM #	*: 4	Original Contract Duration : 502		
Original Contract Amount	: 2,763,873.33	Original Calendar (Version) : None		
Current Contract Amount	6,620,948.83	Date : 08/06/2024		
Total Overrun	:	Approval Date : None		
Total Underrun	:	CM Type *: Supplemental Agreement	~	
Net Change this CM	: 0.00	Affected Work Area : Select		
Contract Amount after Change	: 6,620,948.83	FAR Authority :	-	
CM Initiated By	EHWA/Other 🗙			
Reason for Change	Other X	Other FAR Authority :		
Contract Modification Description	*: Reduce in contract time			
Description and Location of Work	:		•	
			14	
CONTRACT TIME				
Time Type	: Calendar Days	Start Date : 10/01/2023		

Figure 5: Contract Modification Details Page

Field Name	Description
Original Contract Amount	The contract amount when the Contract Items list was
	locked.
Original Contract Duration (Days)	The initial contract duration when the Contract Items list was locked.
Current Contract Amount	The current contract amount includes the amount added to
	or deducted from the original contract amount by approved
	contract modifications.
	That is, the sum of the <b>Original Contract Amount</b> and the
	sum of amounts of all the approved contract modifications.
Original Calendar (Version)	The calendar selected and the calendar version associated
	to the contract when Contract Items list was locked.
	Displays <b>None</b> if a calendar was not associated with the
	locked contract.
Total Overrun	Upon adding the details in the CONTRACT MODIFICATION
	ITEMS tab, it displays the sum of all positive changes in
	amount from the CONTRACT MODIFICATION ITEMS tab.
Date	The current date.
Total Underrun	Upon adding the details in the CONTRACT MODIFICATION
	ITEMS tab, it displays the sum of all negative changes in
	amount from the CONTRACT MODIFICATION ITEMS tab.

In the **GENERAL** section, the following information is displayed:

Field Name	Description
Approval Date	On approval of the contract modification, the date of
	approval.
Net Change this CM	Upon adding the details in the CONTRACT MODIFICATION
	ITEMS tab, it displays the sum of contract modification
	amount.
Contract Amount after Change	Contract amount including the current contract
	modification amount.
	That is, the sum of the <b>Current Contract Amount</b> and <b>Net</b>
	Change this CM.

In the **CONTRACT TIME** section, the following information is displayed:

CONTRACT MODIFICATION DETAILS CON	NTRACT MODIFICATION ITEMS		
Save & Exit Save & Continue	🛞 Cancel 🛛 🙀 Workflow 👻	Select Actions 👻	
CONTRACT TIME			
Time Type :	: Calendar Days	Start Date :	10/01/2023
Current Calendar Days :	472	Current Completion Date :	01/14/2025
Current Calendar (Version) :	: None	Completion Date after Change :	12/15/2024
Change in Calendar Days :	-30		
Description :	:		

#### Figure 6: Contract Time Section

Field Name	Description
Time Type	• If a calendar is selected for the contract, <b>Working Days</b>
	is displayed.
	• If no calendar is selected for the contract, <b>Calendar</b>
	Days is displayed.
Start Date	The date the contract begins as specified during contract creation.
Current Working Days / Current	• If a calendar is selected for the contract, then based on
Calendar Days	the latest version of the calendar selected, the <b>Current</b>
	Working Days box displays the number of days
	calculated from the selected Start Date to the selected
	Current Completion Date of the contract.
	• If no calendar is selected for the contract, the <b>Current</b>
	Calendar Days box displays the number of days
	calculated from the selected <b>Start Date</b> to the selected
	Current Completion Date of the contract.
Current Completion Date	The current completion date is current contract end date as
	defined in the CONTRACT DETAILS page.
Current Calendar (Version)	The calendar and calendar version currently associated
	with the contract.

Field Name	Description
Completion Date after Change	It is calculated as: Current Completion Date + (Change in
	Calendar Days) or (Change in Working Days)

The **FUNDING-SUMMARY** section displays the funding details of all the approved **Project Fund List** records for the **CON** type fund sources.

The following information is displayed:

Column Name	Description
Fund Source	The name of the approved project fund source with the <b>CON</b> type
Fund Category	The category of the project fund source.
Account Number	The account number of the project fund source.
Authorized Amount	The amount authorized for the project fund source.
Remaining Amount	The remaining funds available in the fund source.

6. In the **GENERAL** section, provide the appropriate information in the fields, as described in the following table:

Field Name	Description
CM #	Enter a unique number to identify the Contract Modifications
	record.
CM Initiated By	From the drop-down list, select the appropriate contract
	modification initiators.
	Available options are FHWA/Other, Contractor, Cooperating
	Agency, FHWA/Construction, etc.
	The drop-down list displays the active initiators defined in the <b>CM</b>
	Initiated By catalog of the library.
Reason for Change	From the multi-select drop-down list, select the appropriate
	reasons for the contract modification.
	Available options are Administrative / Pen & Ink Changes, Award
	Option, Final Contract Closeout, Other, etc.
	The drop-down list displays the active reasons defined in the <b>CM</b>
	Issue Reasons catalog of the library.
СМ Туре	Note: Once the record is saved, you cannot modify the selected
	option.
	From the drop-down list, select the appropriate type of contract
	modification.
	Available options are Change Order, Supplemental Agreement,
	etc.
	The drop-down list displays the active types defined in the <b>Change</b>
	Modifications Type catalog of the library.

Field Name	Description			
	<b>Note:</b> If the selected type is <b>Administrative Change</b> , the <b>CONTRACT MODIFICATION ITEMS</b> tab is not available. It means you cannot make any modifications to the contract items. You can change only the funding information and contract time.			
Affected Work Area	From the mu areas affecte Available op <b>Work Affect</b>	From the multi-select drop-down list, select the appropriate work areas affected by the modification. Available options are active work areas defined in the <b>Area of</b> <b>Work Affected</b> catalog of the library		
FAR Authority	To select the associated v steps: a. Click The <b>F</b> .	Federal Activith the cor	equisition Regulation (FAR) authorities intract modification, perform the following <b>ity</b> dialog box is displayed.	
	Availa FAR Authori Delected of Availa FAR A b. Select	ty terrai 13	Image: Select All Records         FAR Authority         FAR S2211 18, Variation in Estimated Quantity         FAR S2217 40, Option for Increased Quantity         FAR S2217 70, Option to Extend the Term of the Contract         FAR S2217 70, Option to Extend the Term of the Contract         FAR S2226 2, Differing Site Conditions         FAR S2226 2, Differing Site Construction         FAR S2226 2, Differing Site Conditions         FAR S2226 2, Differing Site Construction         FAR S2226 2, Differing Site Conditions         S	
Other FAR Authority	Note: This field is editable if the selected FAR Authority is Other Authority Authorized under FAR 43.103. Enter the name of the FAR authority associated with the contract modification.			
Contract Modification Description	Enter a brief description of the contract modification.			
Description and Location of Work	Enter a description of the modification requested and the location of work.			

7. In the **CONTRACT TIME** section, provide the appropriate information in the fields, as described in the following table:

Field Name	Description
Change in Working Days /	To extend the duration of the contract, enter the number of extra
Change in Calendar Days	days required for the contract.

Field Name	Description
	Alternatively, to decrease the contract duration, press the Minus Sign
	(-), and then enter the number of days to be decreased from the
	contract duration.
Description	Enter the purpose for the requested change in duration.

8. In the KEY DATES section, provide the appropriate information in the fields, as described in the

# following table:

CONTRACT MODIFICATION DETAILS CON	TRACT MODIFIC	ATION ITEMS			
Save & Exit Save & Continue	( Cancel	👫 Workflow 👻	📽 Select Actions 👻		
KEY DATES					
Date RFP Sent to Contractor :	01/01/2023	$\sim$	Date Negotiations Completed	: None 🗸 🗸	
Date PR Signed :	None	$\checkmark$	Date SF30 Sent to Contractor for Signature	: None 🗸 🗸	
Date SF30 Signed by Contractor :	01/02/2024	$\sim$	Date SF30 Signed by CO	: 01/03/2024 🗸 🗸	
Date CM Work Started :	11/01/2024	~			

Figure 8: Key Dates Section

Field Name	Description
Date RFP Sent to Contractor	Select the date on which the Request for Proposal (RFP) was
	sent to the contractor.
Date PR Signed	Select the date on which the PR was signed.
Date SF30 Signed by Contractor	Select the date on which the SF30 was signed by the
	contractor.
Date CM Work Started	Select the date on which the contract modification work was
	started.
Date Negotiations Completed	Select the date on which the negotiations were completed.
Date SF30 Sent to Contractor for	Select the date on which the SF30 was sent to the contractor
Signature	for signature.
Date SF30 Signed by CO	Select the date on which the SF30 was signed by the
	Contracting Officer (CO).

- 9. To add the details of an issue due to which the contract modification is being created, in the **ISSUES** section, perform the following steps:
  - a. Click Add.

CONTRACT MOD	IFICATION DETAILS CON	ITRACT MODIFICA	TION ITEMS					
🚡 Save & Exit	Save & Continue	Cancel	🛃 Workflow 👻	🚏 Select Acti	ions 🔻			
ISSUES								
Issue Nu	mber 🍸 Issue Desc	ription * 🝸 🕻	Change in time due	to Issue * 🌱 🍸	Reason for Issue	Areas of Work Affected	Issue Initiated By	Y Contractual Effects
No records av	ailable.							
Add Delet	e							

Figure 9: Issues Section

# The **New ISSUES** dialog box is displayed.

New ISSUES				×
Issue Number	:	1		
Issue Description *	:	Negotiation in added work	4	
			111	
Change in time due to Issue *	:		-30	
Reason for Issue	:	Other 🗙		
Areas of Work Affected	:	Select		
Issue Initiated By	:	FHWA/Other	~	
Contractual Effects of Issue	:	Added Work (Negotiated) 🗙		
Contract Amount	:	0.00		
Pay Items Affected	:			
		Save Cancel		

Figure 10: New Issues Dialog Box

The Issue Number field displays the identification number for the issue record.

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

Field Name	Description
Issue Description	Enter the details of the issue that occurred.
Change in time due to Issue	Enter the time impact of the identified issue on the
	contract.
Reason for Issue	From the multi-select drop-down list, select the
	appropriate reasons for the issue.
	Available options are Award Option, Final Contract
	Closeout, Other, Partnering, etc.
	The drop-down list displays the active reasons defined in
	the CM Issue Reasons catalog of the library.
Areas of Work Affected	From the multi-select drop-down list, select the
	appropriate work areas affected by the issue. Available

**Construction Part B** 

**Participant Guide** 

Field Name	Description
	options are Aggregate - Base / Subbase, Aggregate -
	Minor, Aggregate - Surface Course, Asphalt - Pavement,
	etc.
	The drop-down list displays the active work areas defined
	in the Area of Work Affected catalog of the library.
Issue Initiated By	From the drop-down list, select the appropriate initiator
	for the issue.
	Available options are FHWA/Construction, FHWA/Other,
	Owning Agency, Cooperating Agency, etc.
	The drop-down list displays the active initiators defined in
	the <b>CM Initiated By</b> catalog of the library.
Contractual Effects of Issue	From the multi-select drop-down list, select the effects of
	issue on the contract.
	Available options are Added Work (Negotiated), Added
	Work (Overtime), Administrative Change, Deleted Work,
	etc.
	The drop-down list displays the active effects of issue
	defined in the <b>Contractual Effects of Change</b> catalog of
	the library.

Once the pay items are added or modified in the **CONTRACT MODIFICATION ITEMS** tab, the following fields are automatically updated:

Field Name	Description
Contract Amount Change due	Displays the sum of the pay items amount to which this
to Issue	issue record is associated.
Pay Items Affected	Displays the pay items' number to which this issue record
	is associated.

c. Click Save.

The details of the issue are added to the **ISSUES** section. Additionally, the editable cells are highlighted.

- d. Optionally, perform the following steps, as applicable:
  - To edit any issue, click the appropriate column of the respective cell and make the necessary changes.
  - To delete any issue, select the appropriate row, click **Delete**, and then click **OK**.
- 10. Once the pay items are added or modified in the **CONTRACT MODIFICATION ITEMS** tab, based on the funding rules assigned to the pay items, in the **FUNDING SUMMARY** section, the **Amount Change in this CM** column is automatically updated with the sum value of the respective items.

CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS												
🖪 Save & Exit 🛛 🐻 Save	e & Continue 🛛 🛞 Cancel	🕅 Workflow 👻 📽	Select Actions 👻									
UNDING SUMMARY												
Fund Source 🛛 🕇	Fund Category	Account Number 🛛 🕇	Authorized Amount	Remaining Amount	Amount Change in this CM 🝸							
CON01	FLTP	15B6062301103.A40.CN .15F1.06.1606000000	560,458.72	289,721.8	37 0.00							
CON02	ERFO	15B6062301103.A40.CN .15F1.06.1606000000	2,203,414.61	998,351.6	53 0.00							
CON03	ERFO	8465189465165	3,857,075.50	3,529,566.0	0.00							
CON04	ERFO	15B6062301103.A40.CN .15F1.06.1606000000	0.00	0.0	0.00							
ATTACHMENTS							- 1					
± ≥ ±												
File View Status	Document Name	Uri/Link	Title U	ploaded By Up	ploaded Date File Size	GPS Latitude	GPS L					
Link Document Up	bload Document											
4						_	•					

Figure 11: Funding Summary Section

Optionally, to modify the amount in the **Amount Change in this CM** column of the appropriate fund source, click and enter the amount.

Alternatively, to enter a negative amount, press the Minus Sign (-), and then enter the amount. Ensure the negative value is not less than the **Remaining Amount** in the fund source.

# Note:

- You can enter negative values to represent a reduction of the amount from the account, and positive values to represent an addition of the amount to the account.
- Suppose a new project fund source is created when the **Contract Modifications** record is in the **Draft** or **Submitted** workflow status; the new fund source is automatically displayed in the **Funding Summary** tab.
- If the **CM Type** is except **Administrative Change**, the sum of all the **Amount Change in this CM** must not be less than the amount required for the contract modification items.
- After the amount is updated in the **Amount Change in this CM** field and then if any modifications are made to the items in the **Contract Modification Items** tab, the **Amount Change in this CM** field in the **Funding Summary** section is automatically updated.
- 11. Optionally, in the **ATTACHMENTS** section, upload or link related files. For information on attachments, refer to <u>Section 4.1. Attachments</u>.
- 12. 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..

The **CONTRACT MODIFICATIONS** list page is displayed.

You can now add items and modify existing items. For more information, refer to <u>Section 3.2.</u> <u>Managing Contract Modification Items</u>.

# **3.2. Managing Contract Modification Items**

The **Contract Modifications** form enables you to make the following modifications in a locked Contract Items list:

- <u>3.2.1. Create a container</u>
- 3.2.2. Add items to a contract modification
- 3.2.3. Add multiple items to a contract modification
- <u>3.2.5. Import schedules from Acquisitions</u>
- <u>3.2.6. Change the quantity of an existing item</u>

# **3.2.1.** Creating a Container

# Prerequisites

- The CM Type is not a Balance Contract Modifications.
- The role of the logged-in user must be one of the following:
  - Administrator
  - Construction Component Lead
  - Construction Admin Staff
  - Construction Engineer
  - Construction Operations Engineer
  - Assistant Project Engineer
  - Project Engineer
  - o Regional Engineer
  - o Assistant Project Engineer A&E
  - Project Engineer A&E

For more information on role-specific permissions, refer to <u>Contract Modifications Permission</u> <u>Matrix.</u>

# Overview

You can create containers at the root level to create new schedules. Additionally, you can create subcontainers inside new or existing schedules, if required.

## Steps

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

	PROJECTS	PR	OJECTS	
Q, I	ype to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🗸 📳 Reports 🛪 🗞	Manage Users 🛛 🛱 Mark Offline/Online 💮 More 👻
	Select Project 💌	0	Project Code	Project Name Project Description Business Unit
۱ <b>ä</b>	Recent Projects		Ţ	
en A			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	511 - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
( <u>a</u> )	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 12: Navigation to Projects Module

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

	PROJECTS	PROJECT DASHBOARD PROJECT DETAILS	
Q,	Type to Search X 🗙	🔏 Select Dashboard: bis st. 🗸 Mode: View 🗸 🖟 New 🧳 Edit 📋 Delete 🍪 Set As Defau	ılt
兪	SIT - CA ERFO FS LSPDR 2023-1(1) 🔹	Report Viewer	
朣	General Quick Access	Hidden 1149 Schedulei etter	
	SIT - CA ERFO FS LSPDR 2023-1(1)	Alternates	
٩	+ Documents		
	<ul> <li>Document Search</li> </ul>		
	<ul> <li>Project Report Gallery</li> </ul>		
	<ul> <li>Project Calendar</li> </ul>		
	<ul> <li>Fund Management</li> </ul>		
	Project Fund List		
	<ul> <li>Project Fund Transaction</li> </ul>		
	Funding Rules		
	+ Bid Estimate Information		
	+ Bidding		
	+ Contracts		

Figure 13: Expanding Projects Folder

3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 14: Navigation to Contracts

4. Click Contract Modifications.

	PROJECTS				CONTRACT MODIFCIATIONS					
Q, T	ype to Search	×	~~	_Ø 1	Edit	👁 View	🔟 Delete	🕅 Workflow 👻 🍄 Select Act	tions 👻 💮 More 👻	
諭	SIT - CA ERFO FS LSPID	R 2023-1(1)	Ŧ		0	CM #		Contract Modifcation Description	Approved On	Amount in \$
1.	General	Quick Ad	cess				T	T	MM/dd/yyy 🔠 🍸	
en	- Contracts					4	:	Reduce in contract time		0.00
	🗕 SIT - CA ERFO	FS LSPDR 2	023			3		Reduce in contract time	05/01/2024	0.00
182	+ Document	5				2		Residential Housing	04/29/2024	0.00
	+ Configurat	ions				1		Award Additional Schedule	04/29/2024	3,857,075.50
	Contract It	ems								
	+ Progress T	racking		4						
	+ Billings & Payments									
	Contract Modifications									
	<ul> <li>Submittals</li> </ul>									
	Contract R	eport Galler	у							
	+ Subcontrac	ct	_							
	Contract C	loseout Stat	us							
	<ul> <li>Claims</li> </ul>									
5	= Freedom o	f Informatio	on A				1			
1	Request fo	r Equitable	Adiu 🔻							

# The **CONTRACT MODIFICATIONS** list page is displayed.

Figure 15: List Page of Contract Modifications Form

- 5. In the list page, select the appropriate record, and then click **Edit**. The **CONTRACT MODIFICATION DETAILS** page is displayed.
- 6. Click the **CONTRACT MODIFICATION ITEMS** tab.

# By default, the containers from the Contract Items form are displayed.

CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS											
Line Number	Description	Supplemental Description	Unit	Quantity	Unit Price in \$	Fund Rule					
T	Y	Ţ	T	T	Y						
	ERFO repairs on Black Mountain										
	Road for MSE Walls, Gabion										
	Walls and Drainage Flumes.										
	Additional Erfo work										
						Þ					
						Page 1 of 1					
	Line Number	Line Number Description  ERFO repairs on Black Mountain Read for MSE Walls, Gabion Walls and Drainage Flumes.  Additional Erfo work	Line Number Description Supplemental Description	Line Number Description Supplemental Description Unit ERFO repairs on Black Mountain Read for MSE Walls, Gabien Walls and Drainage Flumes. Additional Erfo work	Line Number Description Supplemental Description Unit Quantity	LATION ITEMS					

Figure 16: Contract Modifications Items Tab

7. Click **New**, and then click **New Container**.

CONTRACT MODIFICATION DET	AILS CONTRACT MODIFIC	ATION ITEMS	
🔓 New 👻 🛅 Save 🥠	🕅 Edit 💿 View	Delete 🛞 Actions	🔹 💬 More 👻
🞝 Add CM Item		Line Number	Description
Nodify Existing Item			
🖹 New Container	:		ERFO repairs on Black Mountain Road for MSE Walls, Gabion
L‡ Add Multiple			Walls and Drainage Flumes.
OGR			Additional Erfo work

Figure 17: New Container Option

# The **CONTAINER** page is displayed.

CONTAINER		
Save & Exit Save & Continue	(a) Cancel	
Name *:	OGR	h
Description *:	Additional Erfo work	
<b>*</b> • • • • • •		
Schedule Letter :	Ŷ	
Schedule Construction Type :	55061 Repair Bridge - Concrete 💙	
Option/Base/New <sup>*</sup> :	OBase	
	l New	
MILES		
Miles or Km *:	0.65	
Lane Miles or Lane Km *:	0.65	
Trail Miles or Trail Km *:		
Than when of their kine i		
GIS DETAILS		
	Latitude T Learnitude T Remarks	
No records available.		
Add Delete		4
BRIDGE DATA		
🔲 Bridge Name 🕇 Bridge N	umber <b>Y</b> Bridge Length <b>Y</b> Bridge Square Feet <b>Y</b> Bridge Construction Type <b>Y</b>	P

#### Figure 18: Container Page

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

Field Name	Description				
Name	Enter a name of the container.				
Description	Enter a description of the container.				
Schedule Letter	From the drop-down list, select a unique letter. Available options				
	are letters from A to Z.				
	Note: You cannot use the schedule letters that are already assigned				
	for the containers of the following:				
	Contract Items				
	<ul> <li>Award for Later in Bid Opening and Review form</li> </ul>				
	Current Contract Modifications				
Schedule Construction	From the drop-down list, select the appropriate schedule				
Туре	construction type.				
	Available options are 20101 Clearing, 20102 Clearing and grubbing,				
	20301 Removal of bridge, 20401 Grading work only, etc.				
	The drop-down list displays the active schedule construction types				
	defined in the Schedule Construction Type catalog of the library.				
Option/Base/New	Select the appropriate option.				

9. In the **MILES** section, provide the appropriate information in the fields, as described in the following table.

Field Name	Description
Miles or Km	Enter a positive number with up to two decimal places.

Field Name	Description				
Lane Miles or Lane Km	Enter a positive number with up to two decimal places.				
Trail Miles or Trail Km	Enter a positive number with up to two decimal places.				

- 10. To add the location details of the container, in the **GIS DETAILS** section, perform the following steps:
  - a. Click Add.

A row is added.										
GIS DETAILS										
				Ľ						
Route ID	T	Latitude 🝸	Longitude <b>T</b> Remarks	T						
Add Delete										

Figure 19: GIS Details Section

- b. In the Route ID column, enter the route identification number of the location.
- c. In the Latitude column, enter the latitude coordinates. Note: You can enter any value within the range of -90 to 90.
- d. In the **Longitude** column, enter the longitude coordinates. **Note:** You can enter any value within the range of -180 to 180.
- e. In the **Remarks** column, enter any remarks, if applicable.
- 11. To add bridge information, in the **BRIDGE DATA** section, perform the following steps:
  - a. Click Add.

A r	A row is added.										
BRI	BRIDGE DATA										
-											ď
	ן נ	Bridge Name	T	Bridge Number		Bridge Length 🝸		Bridge Square Feet	T	Bridge Construction Type	T
C	כ										
A	dd	Delete									

Figure 20: Bridge Data Section

- b. In the Bridge Name column, enter the name of the bridge.
- c. In the **Bridge Number** column, enter the number of the bridge.
- d. In the **Bridge Length** column, enter the length of the bridge. Note: You must enter any positive number with up to two decimal places.
- e. In the Bridge Area column, enter the square feet of the bridge. **Note:** You must enter any positive number with up to two decimal places.
- f. In the **Bridge Construction Type** column, select the appropriate bridge construction type. Available options are active bridge construction types defined in the Bridge Construction **Type** catalog of the library.

12. 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.

The container is created.

# 3.2.2. Adding Items to a Contract Modification

# Prerequisites

- The **Solicitation Procedure** in the published advertisement is defined as **Design-Build** or **Letter Contract**.
- The CM Type is not a Balance Contract Modifications.
- The role of the logged-in user must be one of the following:
  - Administrator
  - Construction Component Lead
  - o Construction Admin Staff
  - Construction Engineer
  - Construction Operations Engineer
  - Assistant Project Engineer
  - Project Engineer
  - Regional Engineer
  - Assistant Project Engineer A&E
  - Project Engineer A&E

For more information on role-specific permissions, refer to <u>Contract Modifications Permission</u> <u>Matrix.</u>

# Overview

The **Contract Modifications** form enables you to add new items to the locked Contract Items list of a contract.

When a **Contract Modifications** record is approved with new items added to it, the contract cost increases.

# Steps

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

The **PROJECTS** list page is displayed.

PROJECTS	PR	OJECTS			
ype to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🛪 📋 Reports 🛪 🎝	Manage Users 🛛 🎼 Ma	rk Offline/Online   💮 M	Nore 👻
Select Project 👻	0	Project Code	Project Name	Project Description	Business Unit
A Decent Projects		T	T		T
<ul> <li>Recent Projects</li> </ul>		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
	ype to Search X Y A Select Project Recent Projects SIT - CA ERFO FS LSPDR 2023-1(1) All Projects	PROJECTS     PR       ype to Search     X     X       Select Project     Image: Comparison of the second sec	PROJECTS     PROJECTS       ype to Search     X     X       Select Project     Image: Constraint of the second seco	PROJECTS     PROJECTS       ype to Search     X     X       Select Project     Image Users     Image Users       A Recent Projects     Image Users     Image Users       SIT ACA ERFO FS LSPDR 2023-1(1)     SIT MT NPS GLAC 14(4) & MT NPS GLACIER     Rehabilitate Many Gla       All Projects     SIT MT NPS GLAC 14(4) & MT NPS GLACIER     Rehabilitate Many Gla       SIT MT NPS GLAC 14(4) & MT NPS GLACIER     Rehabilitate Many Gla       SIT MT NPS GLAC 14(4) & MT NPS GLACIER     Rehabilitate Many Gla	PROJECTS       PROJECTS         ype to Search       X       X       New & Workflow ~ @ Reports ~ & Mark Offline/Online @ Mark O

Figure 21: Navigation to Projects Module

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

	PROJECTS	Rejectoshooko Rejectoshis	
С,	Type to Search X 🗙	ฐ Select Dashboard: bis st. 🗸 Mode: Yiew 🗸 🖓 New 📝 Edit 🏢 Delete 🦓 Set As Defa	ult
	STT - CA ERFO FS LSPDR 2023-1(1) 🔫	Report Viewer	
1.	General Quick Access	Ridder 1149 Schedulei etter View Report	
	SIT - CA ERFO FS LSPDR 2023-1(1)	Alternates	
\$	+ Documents		
	<ul> <li>Document Search</li> </ul>		
	<ul> <li>Project Report Gallery</li> </ul>		
	<ul> <li>Project Calendar</li> </ul>		
	— Fund Management		
	<ul> <li>Project Fund List</li> </ul>		
	Project Fund Transaction		
	<ul> <li>Eunding Rules</li> </ul>		
	+ Bid Estimate Information		
	+ Bidding		
	+ Contracts		

Figure 22: Expanding Projects Folder

#### Federal Highway Administration

3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 23: Navigation to Contracts

4. Click Contract Modifications.

The **CONTRACT MODIFICATIONS** list page is displayed.

	PROJECT	s		co	NTRAC	T MODIFCIAT	TIONS			
9	Type to Search	×	~ ^	_0	Edit	👁 View	Delete	🕼 Workflow 👻 🎬 Select Act	ions 👻 💮 More 👻	
諭	SIT - CA ERFO FS LSPI	DR 2023-1(1)	Ŧ		0	CM #		Contract Modifcation Description	Approved On	Amount in \$
讘	General	Quick A	ccess				T	T	MM/dd/yyy 🗰 🍸	
n A	— Contracts					4	:	Reduce in contract time		0.00
	— SIT - CA ERF	O FS LSPDR	2023			3		Reduce in contract time	05/01/2024	0.00
-(Q)-	+ Documen	its				2		Residential Housing	04/29/2024	0.00
	+ Configura	itions				1		Award Additional Schedule	04/29/2024	3,857,075.50
	Contract I	ltems								
	+ Progress	Tracking		¢						
	+ Billings &	Payments								
	Contract	Modificatio	ns							
	Submittal	c								
	= Contract	Penort Galle								
			y							
	+ Subcontra	act								
	Contract (	Closeout Sta	tus							
	<ul> <li>Claims</li> </ul>									
>	Freedom	of Informati	on A		7					
·	Request f	or Equitable	Adiu 🔻			ننا کا ت				

Figure 24: List Page of Contract Modification

5. In the list page, select the appropriate record, and then click **Edit**. The **CONTRACT MODIFICATION DETAILS** page is displayed.

# 6. Click the CONTRACT MODIFICATION ITEMS tab.

CC	CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS									
Ð	New - 🔝 Save	💮 More 👻								
	Name		Line Number	Description	Supplemental Description	Unit	Quantity	Unit Price in \$	Fund Rule	
			T	T	T	T	T	Y		
	🕂 🐂 Schedule A			ERFO repairs on Black Mountain Road for MSE Walls, Gabion Walls and Drainage Flumes.						
	🗄 🛅 OGR			Additional Erfo work						
							•	Total Arr	• • • • • • • • • • • • • • • • • • •	
14									Page 1 of 1	

Figure 25: Contract Modification Items Tab

7. Select the appropriate container, and then click New, and then click Add CM Item.

New - 🔝 Save 🥖	Edit 💿 View	🛅 Delete 🖇 Ad	ctions 👻 💮 More 👻				1 Select	ed X
Add CM Item		Line Number	Description		Supplemental Description	Unit	Quantity	Unit Price
Modify Existing Item		Υ	<b>T</b>	T	T	T	T	
🗂 New Container			Base A					
I			Option X					

#### Figure 26: Add CM Item

NEW CONTRACT MODIFICATION ITEM			
Save & Exit 🚺 Save & Continue	Save & Create New 🛞 Car	ancel	
Container	Root/Base A	Select Item from Library	
Pay Item No. *	: 15210-4000	Clear Standard Item Table : TP 14 🗸	I
Line Number *	A010	Ignore Containers of Standard Items	I
Description	CENTERLINE, ESTABLISHMENT	Select	I
		ß	I
Supplemental Description		A	
Unit .	· MILL ·		
Funding Kule	select V		
Quantity	: 100.000	0 <u>SUD TOMS</u>	
Unit Price in \$	: 79.00	0	
Amount in \$	7,900.00	0	
Complete	: 🗖		
Pay Item Type *	: N 🗸		
à			

The **NEW CONTRACT MODIFICATION ITEM** page is displayed.

#### Figure 27: New Contract Modification Item Page

8. Provide the required information in the fields, as described in the table.

Field Name	Description
Container	By default, the name of the selected container is displayed.
	To select a different container to categorize the item, perform the
	following steps:

Field Name	Des	cription					
	a. (	Click .					
	The	SELECT CONTAINER	R page is displayed.				
		SELECT CONTAINER					
		_					
		l-Root					
		Calcadad					
		Schedul	e A				
	Figure 29: Salact Container Page						
	b. (	Click the appropriate	e container.				
Pay Item No.	Ente	er the item number.					
	Alternatively, to select an item from the library, perform the following						
	steps:						
	Not	e: By default, the Sta	Standard Items Table selected for the project is				
	disp	played and you canno	ot change the standard table.				
	а.	Click <b>Select</b> to selec	t an item from the selected st	andard items			
	-	table. The <b>Places coloct</b> or	item dialog boy is displayed				
		Ine <b>Please select ar</b> Items are displayed i	n the ascending order of the r	av item number			
		and based on the <b>Me</b>	asurement System defined i	n the project			
		details nage.		in the project			
		Available options are	items defined in the selected	l standard items			
	1	table that is defined i	in the <b>Standard Items Table</b> of	atalog of the			
		library.		-			
	b. (	Click an item, and th	en click <b>Select</b> .				
	-	The Pay Item No., De	escription, Unit, Pay Item Ty	<b>se</b> , and			
		Material Incentive o	f the selected item are displa	yed. If an item			
	1	added from library ha	as the <b>Material Incentive</b> field	l selected as			
	<b>Yes</b> , an item is automatically added with the following information:						
		Field Name	Description				
		Container	The value as specified for	-			
		Pay Item No	the parent item.				
		Description	The same description as the	-			
		200011011	parent item appended with				
			(Ouality).				

Field Name	Des	cription		
		Unit	The value as specified for	
			the parent item.	
		Funding Rule	If a default funding rule is	
		0	assigned to the project, then	
			the same funding rule is	
			displayed.	
			Otherwise, the field is blank.	
		Quantity	If the <b>Unit</b> field is <b>LPSM</b> or	
			CTSM, then 1 is displayed.	
			Otherwise, the field is blank.	
			It is always LPSM for for	
			Material Incentive	
		Line Number	The fields are blank.	
		Supplemental		
		Description		
		Unit Price in \$		
		Complete		
		Probable		
		Quantity		
		Notes		
		Pay item Type	of this N NM NP NS OM	
		Material Incentive	It is selected as <b>No</b>	
To undate the necessary fiel	de foi	the item refer to th	e appropriate rows in this table	28
applicable	us 101	the item, refer to th	e appropriate rows in this table,	
Line Number	Ente	r a unique line num	per for the item.	
Description	Ente	r the description of	the item.	
•	Item	description is displ	ayed automatically if you have s	elected the
	item	from the library.		
Supplemental Description	Ente	er the supplement de	escription of the item.	
Unit	Fron	n the drop-down list	, select the unit of measure for t	the item.
	Avai	lable options are LP	SM, MILE, EACH, SQYD, etc.	
	The	drop-down list displ	ays measurement units defined	l in the
	Mea	surement Systems	catalog of the library.	
	For r	nore information on	measurement systems, refer to	o the
	Mea	surement Systems	section in the <b>A01 Library Man</b>	agement PG.
	Item	unit is displayed au	tomatically if you have selected	i the item
Funding Dula	Trom	i the uprary.	unding will a fact the site ins	
runding Kule	Sele	loble options are co	anding rule for the item.	the project
	For	nore information on	funding rules, refer to the <b>Fund</b>	
	sect	ion in the M03 Fund	Management PG	ing nuco
	lf su	b-items are added for	or the item, then this field is not	available. For
	mor	e information, refer t	o <u>Section 3</u> .2.4. Adding Sub Ite	ms.

Field Name	Description
Quantity	Enter the required quantity of the item.
	You can add sub-items to an item, and the quantity of the item is
	calculated as the sum of all the sub-items added. For more
	information, refer to Section 3.2.4. Adding Sub Items.
Unit Price in \$	Enter the cost per unit.
	If the Unit is LPSM or CTSM, then unit price is defaulted to 1\$ and
	Quantity field remains editable.
	Note:
	Suppose you are trying to balance out an extra amount already paid
	to the contractor, you can enter negative values as the item unit price
	and approve the CM. Once the CM is approved, you can post the item
	with negative value through an Item Posting and the Pay Estimates
	will consider the values accordingly. The deduction in amount
	through the CM is also displayed in the CI.
	Upon entering the values in the <b>Quantity</b> and <b>Unit Price in \$</b> fields,
	the <b>Amount in \$</b> field displays the total amount of the item.
	It is calculated as: Quantity x Unit Price in \$
Complete	Select the check box to mark the item as complete.
	On marking an item as complete, the item will not be available for
	item postings to be processed in a pay estimate.
	For more information on item postings, refer to the Item Postings
	section in the M06 Construction Part A PG.
Pay Item Type	From the drop-down list, select the appropriate type of pay item.
	Available options are N, NM, NR, NS, QM, etc.
	The drop-down list displays the active pay item types defined in the
	Pay Item Type catalog of the library.
	Item type is displayed automatically if you have selected the item
	from the library.
Material Incentive	Click <b>Yes</b> if the item involves any incentives for the contractor based
	on the quality of the material. Otherwise, click <b>No</b> .
	The value is displayed automatically if you have selected the item
	from the library.
Notes	Enter any additional information relevant to the item.
Probable Quantity	Enter the probable quantity for the item.
	Probable quantity defines the estimated quantity for a contract item
	to keep a track on the suggested quantity of a contract item and its
	actual usage during the construction.
	Opon entering the values in the <b>Probable Quantity</b> and <b>Unit Price in</b>
	<b>5</b> fields, the <b>Probable Amount</b> field displays the total amount for the
	Item.
	It is calculated as: Propable Quantity X Unit Price in \$
	<b>Brobable Amount</b> of the item is coloulated as the sum of all the sub
	itoma added. For more information, refer to 2, 2, 4. Adding Sub-
	I items added. For more information, refer to <u>3.2.4. Adding Sub Items</u> .

9. To associate an issue record with the item, in the **ISSUES GRID** section, perform the following steps:

# a. Click Add.

A row	is added.		
ISSUE	S GRID		
			Ľ
	lssue	T	Issue Quantity 🝸
			1.000
Add	Delete		

Figure 29: Issue Grid Section

- b. Double-click the Issue column and select the appropriate issue record.
   Available options are issues defined in the ISSUES section in the CONTRACT MODIFICATION DETAILS page.
- c. In the Issue Quantity column, by default, the quantity defined for the item is displayed for the first entry.

Optionally, double-click and enter the item quantity required for the respective issue. For the subsequent entry, by default, the column displays the difference quantity from the first entry and the item's Quantity. For example, the item's Quantity is 15 and the Issue Quantity of the first entry is 5, then the Issue Quantity of the next entry is 10.

Note: To save the record, ensure the sum of Issue Quantity should be equal to item's Quantity.

- 10. Optionally, in the **ATTACHMENTS** section, upload or link related files. For information on attachments, refer to <u>Section 4.1. Attachments</u>.
- 11. To save the item, perform any of the following steps, as applicable:
  - Click **Save & Exit** to return to the item list page.
  - Click **Save & Continue** to save the item and continue on the same page.
  - Click Save & Create New to save the current item and continue creating new items.

Click **Cancel** to discard the added information and exit the page.

# 3.2.3. Adding Multiple Items to a Contract Modification

# Prerequisites

- The CM Type is not a Balance Contract Modifications.
- The role of the logged-in user must be one of the following:
  - Administrator
  - Construction Component Lead
  - Construction Admin Staff
  - Construction Engineer
  - Construction Operations Engineer
  - Assistant Project Engineer

- o Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to Contract Modifications Matrix.

# Overview

Instead of adding items one by one, you can add multiple items from the library to the contract modification at once. This saves time and efforts.

## Steps

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

The **PROJECTS** list page is displayed.

	PROJECTS	PR	DJECTS			
Q,	ype to Search 🗙 🗙 🔨	Ф	New 🖟 Workflow 👻 📳 Reports 👻 🖧	Manage Users 🛛 🧖 Ma	rk Offline/Online 💮 N	lore 🔻
	Select Project	0	Project Code	Project Name	Project Description	Business Unit
ta.	Recent Projects		T			
E E E E			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
<u>ج</u>	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands

Figure 30: Navigation to Projects Module

#### Federal Highway Administration

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





3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 32: Navigation to Contracts

4. Click Contract Modifications.

The **CONTRACT MODIFICATIONS** list page is displayed.

PROJECTS				CONTRACT MODIFCIATIONS							
C Type to Search X V A			_0 1	🍠 Edit 🐵 View 🏛 Delete 🕼 Workflow 👻 🐮 Select Actions 👻 💮 More 👻							
諭	SIT - CA ERFO FS LSPIDR 2023-1(1) 💌			0	CM #			Contract Modifcation Description	Approved On	Amount in \$	
1.	General	Quick Ad	cess			_				MM/dd/yyy 🗰 🍸	
en I	— Contracts	- Contracts				4		:	Reduce in contract time		0.00
~	- SIT - CA ERFO FS LSPDR 2023					3			Reduce in contract time	05/01/2024	0.00
1.92	+ Documents					2			Residential Housing	04/29/2024	0.00
	+ Configurations					1			Award Additional Schedule	04/29/2024	3,857,075.50
	<ul> <li>Contract Items</li> </ul>										
	+ Progress Tracking										
	+ Billings & Payments										
	Contract Modifications		IS								
	<ul> <li>Submittals</li> </ul>										
	<ul> <li>Contract Report Gallery</li> </ul>										
	+ Subcontract										
	<ul> <li>Contract Closeout Status</li> </ul>										
	Claims										
>	Freedom of Information A					1					
	<ul> <li>Request for</li> </ul>	or Equitable	Adiu 🔻			لنا کا ــ					



- 5. In the list page, select the appropriate record, and then click **Edit**. The **CONTRACT MODIFICATION DETAILS** page is displayed.
- 6. Click the CONTRACT MODIFICATION ITEMS tab.

CONTRACT MODIFICATIO	N DETAILS CONTRACT MODI	FICATION ITEMS						
🗗 New - 🛅 Save	💮 More 👻							
Name		Line Number	Description	Supplemental Description	Unit	Quantity	Unit Price in \$	Fund Rule
			Y	Ţ	T	T	Y	
			ERFO repairs on Black Mountain					
📄 🗄 🛅 Schedule A			Road for MSE Walls, Gabion					
			Walls and Drainage Flumes.					
🔲 🕀 🛅 OGR			Additional Erfo work					
-						)		- F
							Total An	nount (\$): 0.00
								Page 1 of 1



## Federal Highway Administration

7. Select the appropriate container, and then click **New**, and then click **Add Multiple**.

CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS										
🞝 New 🗸 🛅 Save 🤳	Edit 💿 View 🔟	Delete 🛞 Actions	🔹 💮 More 👻							
🞝 Add CM Item		Line Number	Description							
Nodify Existing Item										
🗍 New Container	:		ERFO repairs on Black Mountain Road for MSE Walls Gabion							
🖳 Add Multiple			Walls and Drainage Flumes.							
OGR			Additional Erfo work							

Figure 35: Add Multiple Option

The ADD STANDARD ITEMS page is displayed.

ADD STANDARD ITEMS										
Standard Item list : FP 14 🗸 V Ignore Containers of Standard Items										
	Pay Item No.	Description	Unit	Unit Price In \$	Pay Item Type	Material Incentive				
No Data available.										
1						Page 1 of 1, items 0 to 0 of 0.				

Figure 36: Add Standard Items

By default, the **Standard Items Table** selected for the project and **Ignore Containers of Standard Items** is selected and you cannot change it.

# 8. Click Add.

The Standard Items dialog box is displayed.

Standard Items										
0 selected of total 3,958										
	Pay Item No. 🝸	Description	U 🝸	Pay Item 🝸	Material In	T				
	15101-0000	MOBILIZATION	LPSM	N	No					
	15201-0000	CONSTRUCTION SURVEY AND STAKING	LPSM	Ν	No					
	15201-9999	HEIDI TEST PAY ITEM ORDER	LNFT	Ν	No					
	15205-0000	SLOPE, REFERENCE, AND CLEARING AND GRUBBING STAKE	LPSM	Ν	No					
	15206-0000	SLOPE, REFERENCE, AND CLEARING AND GRUBBING STAKE	MILE	Ν	No					
	15210-1000	CENTERLINE, STAKING	MILE	Ν	No					
	15210-3000	CENTERLINE, VERIFICATION AND STAKING	MILE	Ν	No					
	15210-4000	CENTERLINE, ESTABLISHMENT	MILE	Ν	No					
	15214-0000	SURVEY AND STAKING, MISCELLANEOUS	LPSM	Ν	No					
	15214-1000	SURVEY AND STAKING, BRIDGE	LPSM	Ν	No					
	15214 2000	SURVEY AND STAKING, RETAINING WALL	LPSM	Ν	No					
	15214-2500	SURVEY AND STAKING, REINFORCED SOIL SLOPE	LPSM	Ν	No					
	15214-3000	SURVEY AND STAKING, PARKING AREA	LPSM	Ν	No					
	15215-1000	SURVEY AND STAKING, APPROACH ROAD	EACH	Ν	No	•				
	<b>▶ ▶</b> 40	▼ items		1 - 4	0 of 3,958 items	C				
		Select Cancel								

#### Figure 37: Standard Items Dialog Box

- 9. Select the required items, and then click Select.
- 10. Optionally, to remove an item, select the appropriate item, and then click **Remove**.
- 11. Click Save.

The items are added to the container selected.

12. To edit the details of an item, select the appropriate item, and the click Edit. Except Pay Item No., Description, Pay Item Type, Unit and Material Incentive, you can edit all other details of the item. For more information on editing the item details, refer to <u>Section 3.2.2. Adding</u> <u>Items to a Contract Modification</u> from Step 8 to 11.
# 3.2.4. Adding Sub Items

#### Overview

You can divide an item into sub items to distribute the amount from different fund sources. If sub items are defined for an item, the quantity of the item is calculated as the sum of the quantities of the sub items.

#### Steps

1. Adjacent to the Quantity field, click Sub Items.

Quantity *: 1.000 Sub Items
-----------------------------

Figure 38: Sub Items

## The **SUB ITEMS** page is displayed.

SUB ITEMS	-						
🞝 New	🔟 Delete 📘 Save	Back					
	Pay Item No.	: 15201-0	000	h.			
	Item Description	: CONSTR STAKING	UCTION SURVEY AND				
Description		Quantity	Unit Price in \$	Unit	Notes	Fund Rule	Ame

#### Figure 39: Sub Items Page

The **SUB ITEMS** page displays the following information:

Field Name	Description
Pay Item No	The pay item number of the item.
Item Description	The description of the item.

#### 2. Click New.

A row is added to the table. The table displays the following information:

Field Name	Description
Unit Price in \$	The unit price of the item.
Unit	The unit of measure selected for the item.
Funding Rule	The funding rule selected for the item.

Field Name	Description
	On saving the sub item, the Description of the item is updated based
	on the funding rule selected.
	Note: You can modify the value as necessary.

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

Column Name	Description
Quantity	Double-click and enter the quantity for the sub item.
Notes	Double-click and enter any notes for the sub item.
Fund Rule	Double-click and select the appropriate funding rule for the sub item.
	Options available are approved funding rules defined for the project.
	For more information on funding rules, refer to the Funding Rules
	section in the M03 Fund Management PG.
Probable Qty	Enter the probable quantity for the sub item.
	It defines the estimated quantity (or amount) that may be needed for
	the completion of the contract.

## 4. Click Save.

Upon saving the sub item details, the **Amount in \$** and **Probable Amount** columns display the amount of the sub item based on the **Quantity** and **Probable Qty** specified for the sub item and the **Unit Price in \$** value specified for the item.

On saving, the **Description** of the item is updated based on the **Funding Rule** associated with the item.

- 5. Optionally, to delete an item, perform the following steps:
  - a. In the table, select the appropriate item.
  - b. Click **Delete**, and then click **OK**.
- 6. Click **Back** to return to the item page.

**Note:** Once sub items are added to an item, you can modify the quantity of the item by editing the quantities of the sub items only.

# **3.2.5. Importing Schedule from Acquisitions**

## Prerequisites

- The CM Type is not a Balance Contract Modifications.
- In the awarded Bid Opening And Review record, a schedules are added in the Available for Later Award field.
- The role of the logged-in user must be one of the following:
  - o Administrator
  - Construction Component Lead
  - Construction Admin Staff

- o Construction Engineer
- Construction Operations Engineer
- Assistant Project Engineer
- Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to Contract Modifications Matrix.

#### Overview

In the **Bid Opening And Review** record, you can select a few schedules for awarding and add the remaining schedules for awarding later.

The **Contract Modification** form enables you to associate those schedules that were saved for awarding later with the contract.

#### Steps

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

The **PROJECTS** list page is displayed.

	PROJECTS	PF	юјесть	
Q D	ype to Search 🗙 🗙 🔨	Ð	New 📳 Workflow 👻 📳 Reports 👻 🗞	Manage Users 🏽 🧖 Mark Offline/Online 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
ta.	Recent Projects		T	
967			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
<b>(</b> 2)	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 40: Navigation to Projects Module

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





3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 42: Navigation to Contracts

4. Click Contract Modifications.

	PROJECTS		CON	TRACI	T MODIFCIATI	ONS				
9,1	ype to Search 🗙 🗙 🔨	ſ	ĴΕ	dit		Ē	Delete	🔄 Workflow 👻 🏦 Select Act	tions 👻 💮 More 👻	
諭	SIT - CA ERFO FS LSPDR 2023-1(1)	0		0	CM #			Contract Modifcation Description	Approved On	Amount in \$
1æ	General Quick Access							T	MM/dd/yyy 🗰 🍸	T
n A	— Contracts		2		4		:	Reduce in contract time		0.00
••••	- SIT - CA ERFO FS LSPDR 2023	C			3			Reduce in contract time	05/01/2024	0.00
<b>بې</b>	+ Documents	1			2			Residential Housing	04/29/2024	0.00
	+ Configurations	0			1			Award Additional Schedule	04/29/2024	3,857,075.50
	<ul> <li>Contract Items</li> </ul>									
	+ Progress Tracking	<								
	+ Billings & Payments									
	Contract Modifications									
	<ul> <li>Submittals</li> </ul>									
	<ul> <li>Contract Report Gallery</li> </ul>									
	+ Subcontract									
	<ul> <li>Contract Closeout Status</li> </ul>									
	<ul> <li>Claims</li> </ul>									
5	<ul> <li>Freedom of Information A</li> </ul>									
<u> </u>	Request for Equitable Adiu		36							

#### The **CONTRACT MODIFICATIONS** list page is displayed.



- 5. In the list page, select the appropriate record, and then click **Edit**. The **CONTRACT MODIFICATION DETAILS** page is displayed.
- 6. Click the **CONTRACT MODIFICATION ITEMS** tab.

CONTRACT MODIFICATION DETAILS CONTRACT	T MODIFICATION ITEMS						
🞝 New - 📄 Save 💮 More -							
Name	Line Number	Description	Supplemental Description	Unit	Quantity	Unit Price in \$	Fund Rule
		Y	Ţ	T	T	T	
		ERFO repairs on Black Mountain					
📄 🔅 🛅 Schedule A		Road for MSE Walls, Gabion					
		Walls and Drainage Flumes.					
🔲 🖭 🛅 OGR		Additional Erfo work					
4					•		Þ
						Total An	nount (\$): 0.00
							Page 1 of 1



#### 7. Click New, and then click Import Schedule from Acquisitions.

CONTRACT N	ODIFICATION	DETAILS	CONTRA	CATION ITEMS	
🗘 New 👻	Save	⊙ ма	ore 🔻		
Add Cr Modify	VI Item / Existing Iten ontainer t Schedule fro	n om Acqui	sitions	Line Number	Ţ
🖳 Add M	ultiple				

Figure 45: Import Schedule from Acquisitions Option

The Select Schedule Letter dialog box is displayed.

Select Schedule Letter					×
Schedule Letter					T
Y					+
	40 🔻 items			1 - 1 of 1 items	Ċ
		Select	Cancel		

Figure 46: Select Schedule Letter Dialog Box

Available options are schedules that are added in the **Available for Later Award** field in the awarded **Bid Opening And Review** record and not associated with any other contract modification.

Click the appropriate schedule, and then click Select.
 The selected schedule is added to the items page.

#### Federal Highway Administration

#### 9. To edit the details of an item, select the appropriate item, and the click **Edit**.

CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS									
↓ New ▼         □         Save         j         Edit         Image: Contract of the second se									
Name	Line Number	Description	Supplemental Description	Unit					
T	T	Ţ	T						
🔲 🕂 🛅 Base A		Base A							
🔲 🕂 🛅 Option X		Option X							
Deption Y		Option Y							
💌 💿 🎼 15101-0000	Y0015	MOBILIZATION		LPSM					
15201-0000	Y0023	CONSTRUCTION SURVEY AND STAKING	15201-0000 Supplemental Description	LPSM					
□	Y0031	SURVEY AND STAKING, BRIDGE	15214-1000 Supplemental Description	LPSM					

Figure 47: Edit Item

You can edit only the following details of the item:

- Supplemental Description
- Funding Rule
- Quantity
- Unit Price in \$
- Complete
- Notes
- Probable Quantity
- ISSUES GRID section

For more information on editing the item details, refer to <u>Section 3.2.2. Adding Items to a Contract</u> <u>Modification</u> from **Step 8 to 11**.

## 3.2.6. Modifying Existing Item Quantity

#### Prerequisites

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

- Administrator
- o Construction Component Lead
- o Construction Admin Staff
- Construction Engineer
- Construction Operations Engineer
- Assistant Project Engineer
- Project Engineer
- Regional Engineer

- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to <u>Contract Modifications Permission</u> <u>Matrix.</u>

#### Overview

You can modify the quantity and probable quantity of an existing contract item to either increase the quantity or decrease it. You can define the modification (increase or decrease) in quantity by entering the value of change.

To remove an item completely, the **Change in Quantity** should be decreased by the same value as the remaining quantity of the item. By doing so, the quantity of the contract item becomes zero once the contract modification is approved. Also, if there is a change in unit price, you can update the remaining quantity of the item as zero and create a new item with the new unit price.

In addition to the quantity, you can also modify the item details, such as **Supplemental Description**, **Funding Rule, Unit Price in \$, Complete, Material Incentive**, and **Notes**.

#### Steps

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

	PROJECTS	PR	OJECTS			
Q	ype to Search 🗙 🗙 🔨	Ð	New 🙀 Workflow 🗸 📋 Reports 🛪 🗞	Manage Users 🛛 🎼 Ma	rk Offline/Online 💮 N	lore 🔻
諭	Select Project 👻	0	Project Code	Project Name	Project Description	Business Unit
讘	Recent Projects		Ţ			T
em#1	SIT. CA 5250 55 L6222 2022 1(4)		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
	STI - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
Ø	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands

Figure 48: Navigation to Projects Module

#### Federal Highway Administration

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





3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 50: Navigation to Contracts

4. Click Contract Modifications.

	PROJECTS	C	ONTRAC	T MODIFCIAT	TIONS			
۹, 1	Type to Search 🗙 🗙 🗸		Edit	👁 View	🔟 Delete	🕼 Workflow 👻 뿧 Select Act	ions 👻 💮 More 👻	
	SIT - CA ERFO FS LSPDR 2023-1(1)	C	9	CM #		Contract Modifcation Description	Approved On	Amount in \$
讘	General Quick Access				Т	T	MM/dd/yyy 🗰 🍸	T
	— Contracts			4	:	Reduce in contract time		0.00
	- SIT - CA ERFO FS LSPDR 2023	C	)	3		Reduce in contract time	05/01/2024	0.00
1.82	+ Documents	10	)	2		Residential Housing	04/29/2024	0.00
	+ Configurations	C	)	1		Award Additional Schedule	04/29/2024	3,857,075.50
	Contract Items							
	+ Progress Tracking							
	+ Billings & Payments							
	Contract Modifications							
	<ul> <li>Submittals</li> </ul>							
	Contract Report Gallery							
	+ Subcontract							
	<ul> <li>Contract Closeout Status</li> </ul>							
	Claims							
	Freedom of Information A				1			
1	Request for Equitable Adiu							

#### The **CONTRACT MODIFICATIONS** list page is displayed.



- 5. In the list page, select the appropriate record, and then click **Edit**.
- 6. Click the **CONTRACT MODIFICATION ITEMS** or **BALANCE CONTRACT MOD ITEMS** tab, as applicable.
- 7. Perform either of the following, as applicable:
  - For a Contract Modification, click New, and then click Modify Existing Item.



#### Figure 52: Modify Existing Item Option

• For a Balance Contract Modification, select the appropriate item, and then click Edit.

BA	BALANCE CONTRACT MODIFICATION DETAILS BALANCE CONTRACT MODIFICATION ITEMS									
ъ	New 👻	Save	_Ø Edit	۲	View	Ū	Delete 🕑 Ad	ctions	- · More -	
	Name						Line Number		Description	Supplemental Description
					- 6			T		Ţ
									ERFO repairs on Black Mountain	
	🖃 🛅 Sche	edule A							Road for MSE Walls, Gabion	
									Walls and Drainage Flumes.	
	÷ 🖪 1	15101-0000			:		A0020		MOBILIZATION	
		15201 0000					00040		CONSTRUCTION SURVEY AND	
	<u>+</u> Eş	15201-0000					A0040		STAKING	



## The **MODIFY EXISTING ITEM** page is displayed.

MODIFY EXISTING ITEM	
Save & Exit Save & Continue	Cancel
Container :	Root/Base A
Pay Item No. *:	15214-1000 <u>Clear</u>
Line Number *:	A0505
Description *:	SURVEY AND STAKING, BRIDGE
	li.
Supplemental Description :	
Unit *:	LPSM V
Funding Rule *:	100% CON01 ~
Change in Quantity :	0.000
Unit Price in \$ :	1.00
Amount in \$ :	0.00
Complete :	
Pay Item Type *:	N 🗸
Material Incentive :	🔾 Yes 🔘 No
Notes :	<b>A</b>
4	

Figure 54: Modify Existing Item Page

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

Field Name	Descriptio	on						
Pay Item No.	Note: This	field is applicable only for Co	ontr	act Mo	dificat	ion.		
	To select t	he item to modify its quantity	/ ne	erform t	he foll	owing		
	stens:							
	steps.							
		······································						
	The list	of all items is displayed.				N N		
	Please select an	tem						
	Pay Item No.	Y Description Y	Unit	Y Pay Item Ty	Y Material In	с <b>Т</b>		
	15101-0000		LPSM	N	No	<b>^</b>		
	30101-2000	AGGREGATE BASE GRADING D	TON	NM	Yes			
	30102 0500	AGGREGATE BASE GRADING C, 12 INCH DEPTH	5QYD	NM	Yes			
	30101-2000	AGGREGATE BASE GRADING D (Quality)	LPSM	QM	No			
	40101-0080	ASPEALT CONCRETE PAVEMENT, GYRATORY MIX, NO. 4 SIEVE NOMINAE MAX	TON	NR	Yes			
	30102-0500	AGGREGATE BASE GRADING C, 12-INCH DEPTH (Quality)	LPSM	QM	No			
	40101-0080	ASPHALT CONCRETE PAVEMENT, GYRATORY MIX, NO. 4 SIEVE NOMINAL MAX	LPSM	QM N	No			
	15201-0000	CONSTRUCTION SURVEY AND STAKING	LPSM	N	No			
	15206-0000	SLOPE, REFERENCE, AND CLEARING AND GRUBBING STAKE	MILE	N	No			
	30101-1000	AGGREGATE BASE GRADING C	TON	NM	Yes			
	20101-1000	AGGREGATE BASE GRADING C (Quality)	LPSM	QM	No			
	15303-0000	CONTRACTOR QUALITY CONTROL MANAGER	MO	N	No	-		
		₩ 40 V items			1 - 14 of 14 it	ems 🖸		
		Select Cancel						
	Descri Type, a	ption, Unit, Funding Rule, L and Material Incentive of the	Init sel	<b>Price i</b> lected i	<b>n \$, P</b> a item ai	nental iy Item re		
Supplemental Description	By default,	, the supplemental description	on o	of the ite	em fro	m the		
	Contract Items page is displayed.							
	Optionally, you can enter the appropriate description for the							
	item.							
Funding Rule	By default,	, the funding rule associated	witł	h the ite	em in t	he		
	Ontionally	from the drep down list and		the on	nronri	<b>. . . .</b>		
	funding rule.							
	Available o	options are approved funding	grul	es defiı	ned foi	r the		
	project. Fo	or more information on fundir	ng ri	ules. re	fer to t	he		
	Funding P	ules section in the M03 Euro	- M h	anador	nont E			
			u 1916			0.		
	If sub-items are added for the item, then this field is not							
	available. For more information, refer to Adding Sub Items in							
	M06 Cons	truction Part A – PG.						
Change in Quantity	Note: In ca	ase of Balance Contract Mod	lifica	ation, t	he Cha	ange in		
	Quantity fi	eld displays the quantify as a	dofi	ned in t	ho one	aroved		
		eta displays the quality as t	Jein	neu in t	ine app	noveu		
	item Posti	ng for the item.						
	To increase	e the quantity of the selected	l ite	m, ente	er the c	quantity		
	that is add	itionally required.						

Field Name	Description
	<b>Note:</b> If the quantity is increased through Balance Contract Modification and the record is saved the Complete check box gets unchecked.
	To decrease the quantity of the selected item, press the Minus sign (-), and then enter the quantity to be decreased from the current locked quantity of the item in the contract. The value must be within the range of the remaining quantities of the items being posted. To remove the item from the contract item list, press the prefix the value with a sign (-), and then enter the item quantity remaining in the contract after approved item postings. If sub items are associated with the item, you can modify the quantity of the item by editing the quantities of the sub items. For more information, refer to Modifying Sub Items in M06 Construction Part A - PC
Complete	Select the check box to mark the item as complete.
	Note: On approving a Balance Contract Modification, all the
	items in the <b>Contract Items</b> page are automatically marked as <b>Complete</b> .
Notes	Enter any notes for the change in quantity of the item.
Probable Quantity	By default, the probable quantity as defined in the contract
	items is displayed.
	Optionally, enter the appropriate probable quantity.
	Once the record is approved, the same quantity is updated in
	the <b>Contract Items</b> form.

- 9. Optionally, in the **ATTACHMENTS** section, upload or link related files. For information on attachments, refer to <u>Section 4.1. Attachments</u>.
- 10. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

# 3.2.7. Modifying Sub Items

#### Overview

You can modify the details of a sub-item, such as quantity, probable quantity, description, fund rule, and notes.

#### Steps

- 1. Perform either of the following as applicable:
  - If you are on the **CONTRACT MODIFICATION ITEMS** page, select the appropriate item, click **Actions**, and the click **Sub Items**.

CO	CONTRACT MODIFICATION DETAILS CONTRACT MODIFICATION ITEMS					
Ð	New 👻 📄 Save 📝 Edit 💿	View 🔟	Delete	Actions     Actions	▼ · · · · · · · · · · · · · · · · · · ·	
	Name		Line Num	🖳 Sub it	ption	
		Ţ		- Sub It		
	🕂 🛅 Base A				Base A	
	🕂 🛅 Option X				Option X	
	🖸 🛅 Option Y				Option Y	
	I5101-0000		Y0015		MOBILIZATION	
	15201-0000	:	Y0023		CONSTRUCTION SURVEY AND STAKING	
			Y0031		SURVEY AND STAKING, BRIDGE	

Figure 56: Sub Items Option

• If you are on the item's details page, corresponding to the **Quantity** field, click **Sub Items**.



Figure 57: Sub Items Options

#### The **SUB ITEMS** page is displayed.

SUB ITEMS						
🞝 New 🔟 Delete 🗋 Save	Back					
Pay Item No	. : 15201-00	000	ħ.			
Item Description	n : CONSTRI STAKING	UCTION SURVEY AND				
Description	Quantity	Unit Price in \$	Unit	Notes	Fund Rule	Ame

Figure 58: Sub Items Page

The **SUB ITEMS** page displays the following information:

Field Name	Description
Pay Item No	The pay item number of the item.
Item Description	The description of the item.

The table displays the following information:

Field Name	Description				
Unit Price in \$	The unit price of the item.				
Unit	The unit of measure selected for the item.				
Funding Rule	The funding rule selected for the item.				
	On saving the sub item, the Description of the item is updated				
	based on the funding rule selected.				
	Note: You can modify the value as necessary.				

2. Provide the appropriate information in the columns, as described in the following table.

Column Name	Description
Quantity	To increase the quantity of the sub-item, enter the quantity that is
	additionally required.
	To decrease the quantity of the sub-item, press the Minus sign (-), and
	then enter the quantity to be decreased from the current locked
	quantity of the item in the contract. The value must be within the range
	of the remaining quantiies of the items being posted.
Notes	Double-click and update the notes.
Fund Rule	Double-click and select the appropriate funding rule for the sub- item.
	Options available are approved funding rules defined for the project.

Column Name	Description
	For more information on funding rules, refer to the Funding Rules
	section in the M03 Fund Management PG.
Probable Qty	To increase the probable quantity of the sub-item, enter the quantity
	that is additionally required.
	To decrease the probable quantity of the sub-item, press the Minus sign
	(-), and then enter the quantity to be decreased from the original locked
	quantity of the item in the contract .

#### 3. Click Save.

Upon saving the sub-item details, the **Amount in \$** and **Probable Amount** columns display the amount of the sub-item based on the **Quantity** and **Probable Qty** specified for the sub-item and the **Unit Price in \$** value specified for the item.

On saving, the **Description** of the item is updated based on the **Funding Rule** associated with the item.

4. Click **Back** to return to the item page.

**Note:** Once sub-items are added to an item, you can modify the quantity of the item by editing the quantities of the sub-items only.

# 3.3. Approving a Contract Modification Record

## Prerequisites

Based on the workflow status of the record, the user must be assigned any of the following roles:

- Administrator
- o Construction Admin Staff
- Construction Component Lead
- Construction Engineer
- Construction Operations Engineer
- Assistant Project Engineer
- Assistant Project Engineer A&E
- Project Engineer
- Project Engineer A&E
- o Regional Engineer

#### Overview

This section explains the positive and forward workflow actions to reach the **Approved** workflow status. To move a **Contract Modifications** or **Balance Contract Modifications** record through the defined workflow, perform the following steps:

#### Steps

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

	PROJECTS	PR	OJECTS			
Q,	Type to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🗸 📋 Reports 🛪 🖧	Manage Users 🛛 🎼 Ma	rk Offline/Online 💮 N	lore 🔻
	Select Project 👻	0	Project Code	Project Name	Project Description	Business Unit
15	A Perent Projects		Y			
	A Recent Projects		SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
	SIT - CA ERFO FS LSPDR 2023-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
Ø	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla	Reconstruction of 12	Western Federal Lands

Figure 59: Navigation to Projects Module

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

	PROJECTS	TROJECT DEFINION TROJECT DEFINES	
С,	Type to Search 🗙 🗙 🔨	🚋 Select Dashboard: bis sc. 🗸 Mode: View 🗸 💭 New 🧳 Edit 🍈 Delete 🧐	Set As Default
	STT - CA ERFO FS LSPDR 2023-1(1)	Report Viewer	
<b>I</b> ≩	General Quick Access	Bidder 1149 Schedulei etter Manufacture	
11	SIT - CA ERFO FS LSPDR 2023-1(1)	Alternates	
٩	+ Documents		
	<ul> <li>Document Search</li> </ul>		
	<ul> <li>Project Report Gallery</li> </ul>		
	<ul> <li>Project Calendar</li> </ul>		
	<ul> <li>Fund Management</li> </ul>		
	<ul> <li>Project Fund List</li> </ul>		
	Project Fund Transaction		
	Funding Rules		
	+ Bid Estimate Information		
	+ Bidding		
	+ Contracts		

Figure 60: Expanding Projects Folder

#### Federal Highway Administration

3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 61: Navigation to Contracts

- 4. Click **Contract Modifications**. The **CONTRACT MODIFICATIONS** list page is displayed.
- 5. To approve the record, perform the following steps:

Phase	Role	Workflow Steps
1	Administrator	a. In the list page, select the appropriate record that is in the
	<ul> <li>Construction</li> </ul>	Draft workflow status, and then click Select Actions.
	Admin Staff	CONTRACT MODIFCIATIONS
	<ul> <li>Construction</li> </ul>	📝 Edit 🐵 View 🔟 Delete 🕅 Workflow 👻 🍄 Select Actions 🔻 🖪 Mail Merge 🔻
	Component Lead	CM # Contract Modificatio     Submit     Approved On
	<ul> <li>Construction</li> </ul>	MM/dd/yyy 🗰 T
	Engineer	4   Reduce in contract time
	<ul> <li>Construction</li> </ul>	3   Reduce in contract time   05/01/2024
	Operations	Figure 62: Workflow Action – Submit
	Engineer	
	<ul> <li>Assistant Project</li> </ul>	b. Click <b>Submit</b> , and in the Masterworks dialog box, click <b>OK</b> .
	Engineer	The workflow status of the record is set to <b>Submitted</b> .
	<ul> <li>Assistant Project</li> </ul>	
	Engineer A&E	
2	<ul> <li>Administrator</li> </ul>	Note:
	<ul> <li>Construction</li> </ul>	To move the Balance Change Modification record to the
	Admin Staff	Approved workflow status, ensure the following conditions are
	<ul> <li>Construction</li> </ul>	met:
	Component Lead	• The Date SF30 Signed by CO field is updated. However, this
	<ul> <li>Construction</li> </ul>	condition is not mandatory if the CM type is Administrative
	Operations	Change.
	Engineer	

Phase	Role					Wor	kflow Step	s	
111000	1010	• The sche	Mile edu	es a les	and La	ne Miles	s fields are u	updated	for all the
		a. I t	n th he :	ne l <b>Su</b> l	ist pag <b>bmitte</b>	je, selec <b>ed</b> workf	t the approp low status,	priate re and the	cord that is in n click <b>Select</b>
1		Actions.							
			_Ø E	dit	O View	Delete	🕅 Workflow 🔻	Select Ac	tions 👻 🙋 Mail Merge 👻
				0	CM #		Contract Modifcatio	BoDroft	Approved On
						T		Approve	MM/dd/yyy 🗰 🍸
					4	:	Reduce in contract		
					3		Reduce in contract	time	05/01/2024
		E			Fig	ure 63: Wo	orkflow Action –	Approve	
		b. (	Clic <b>DK</b> .	k <b>A</b>	pprov	<b>e</b> , and ii	n the <b>Maste</b>	erworks	dialog box, click
		-	Гhe	wo	orkflow	status	of the record	d is set t	o Approved.

# **3.4. Contract Modifications Workflow Status**

The following table provides the workflow status (current and subsequent status) of the **Contract Modification** and **Balance Contract Modification** records.

For information on setting a workflow status to the next status, refer to <u>Section 4.3. Workflow Status</u> <u>Transitions</u>.

Phase	Current Workflow	Action Stakeholders	Action	Subsequent Workflow	Comments
	Status			Status	
1	Draft	Administrator	Submit	Submitted	After the record is
		<ul> <li>Assistant</li> </ul>			moved to the
		Project			Submitted workflow
		<ul> <li>Engineer</li> </ul>			status, only action
		<ul> <li>Assistant</li> </ul>			stakeholders
		<ul> <li>Project</li> </ul>			corresponding to
		Engineer A&E			this workflow status
		Construction			can edit the record.
		Admin Staff			Note: The following
		<ul> <li>Construction</li> </ul>			fields must be filled,
		Component			else,
		Lead			Masterworks throws
		<ul> <li>Construction</li> </ul>			an error:
		Engineer			<ul> <li>Quantity</li> </ul>
					Unit Price
					Funding Rule

#### Federal Highway Administration

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
		<ul> <li>Construction Operations Engineer</li> <li>Project Engineer</li> <li>Project Engineer A&amp;E</li> <li>Regional Engineer</li> </ul>			Line Number
2	Submitted	<ul> <li>Administrator</li> <li>Construction Admin Staff</li> <li>Construction Component Lead</li> <li>Construction Operations Engineer</li> </ul>	ReDraft Approve	Draft Approved	<ul> <li>To perform this workflow action, ensure the following conditions are met:</li> <li>The Date SF30 Signed by CO field is updated. However, this condition is not mandatory if the CM type is Administrati ve Change.</li> <li>The Miles and Lane Miles fields are updated for all the schedules.</li> <li>On approval of a Contract Modifications record, the following changes occur:</li> <li>Associated contract modification items are added or modified in the Contract ltems list and the walue of the</li> </ul>

Phase	Current Workflow	Action Stakeholders	Action	Subsequent Workflow	Comments
	Status	otakonotaono		Status	
					contract amount
					is adjusted
					accordingly.
					Approved
					<b>Project Fund</b>
					Transaction
					record are
					automatically
					created for the
					values updated
					in the <b>Amount</b>
					Change in this
					<b>CM</b> column
					in the <b>FUNDING</b>
					SUMMARY
					section.
					On approval of a
					Balance Contract
					Modifications
					record, the following
					changes occur:
					<ul> <li>Associated</li> </ul>
					contract
					modification
					items are
					modified in
					the Contract
					Items list and
					the value of
					the contract
					is adjusted
					Complete
					column in the
					Contract
					lteme
					nade is
					page is automatically
					selected for
					all items
					<ul> <li>Approved</li> </ul>
					Project Fund

Phase	Current Workflow Status	Action Stakeholders	Action	Subsequent Workflow Status	Comments
					Transaction
					record are
					automatically
					created for
					the values
					updated in
					the <b>Amount</b>
					Change in
					this CM
					column
					in the
					FUNDING
					SUMMARY
					section.

# 3.5. Generating Contract Modification Reports

## Prerequisites

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

- o Administrator
- o Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QAQC
- Construction Operations Engineer
- Inspector
- Assistant Project Engineer
- Project Engineer
- o Regional Engineer
- Construction Inspection A&E Manager
- Inspector A&E
- Assistant Project Engineer A&E
- Project Engineer A&E

#### Overview

You can generate various Contract Modification reports that illustrate various information views. These reports enable various project and contract stakeholders to stay up-to-date on the status of the contract modification.

#### Steps

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

	PROJECTS	PR	OJECTS	
Q,	ype to Search 🗙 🗙 🔨	Ð	New 🖟 Workflow 🗸 📳 Reports 🕇 🗞	Manage Users 🛛 🛱 Mark Offline/Online 💮 More 👻
	Select Project	0	Project Code	Project Name Project Description Business Unit
朣	Recent Projects		T	
969			SIT MT NPS GLAC 14(4) & MT NPS- Test GL	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
	511 - CA ERFO FS ESPOR 2025-1(1)		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
( <u>\$</u> )	All Projects		SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands
			SIT MT NPS GLAC 14(4) & MT NPS GLACIER	Rehabilitate Many Gla Reconstruction of 12 Western Federal Lands

Figure 64: Navigation to Projects Module

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

	PROJECTS	PROJECT DASHBOARD PROJECT DETAILS	
С,	Type to Search 🗙 🗙 🔨	🔏 Select Dashboard: bis sk 🗸 🗸 Mode: View 🗸 🖓 New 🧳 Edit 🍈 Delete	🏀 Set As Default
	SIT - CA ERFO FS LSPDR 2023-1(1) 🗢	Report Viewer	
朣	General Quick Access	Budden 1149 Schedulei etter 1149	
:::	SIT - CA ERFO FS LSPDR 2023-1(1)	Alternates	
₿	+ Documents		
	<ul> <li>Document Search</li> </ul>		
	<ul> <li>Project Report Gallery</li> </ul>		
	<ul> <li>Project Calendar</li> </ul>		
	— Fund Management		
	<ul> <li>Project Fund List</li> </ul>		
	<ul> <li>Project Fund Transaction</li> </ul>		
	<ul> <li>Funding Rules</li> </ul>		
	+ Bid Estimate Information		
	+ Bidding		
	+ Contracts		

Figure 65: Expanding Projects Folder

#### Federal Highway Administration

3. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 66: Navigation to Contracts

 Click Contract Modifications. The CONTRACT MODIFICATIONS list page is displayed.
 In the toolbar, click Reports, and then click the appropriate report.

со	NTRAC	TMODIFCIATIONS		
Ð	New 🔹	🖌 🗗 Workflow 👻	🖹 Reports 🔻 💮 More 👻	
	0	CM #	Contract Modification Report	Approved On
			CM Affected Pay Item Report	MM/dd/yyy 📅 🔽
		4		
		3	Reduce in contract time	05/01/2024
		2	Residential Housing	04/29/2024
		1	Award Additional Schedule	04/29/2024

#### Figure 67: Contract Modifications Report

The report is generated and displayed.

You can generate the following reports:

- CM Affected Pay Item Report
- Contract Modification Report

# 4. Appendix

# 4.1. Attachments

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

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

#### 4.1.1. Attaching a File to a Form

- 4.1.2. Attaching a File to a Workflow
- 4.1.3. Accessing and Downloading Attached Files
- 4.1.4. Deleting Attached Files

You can annotate and delete attachments.

## 4.1.1. Attaching a File to a Form

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

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

The Project Fund List form is used for illustration purposes.

## **Uploading Files to a Form**

To upload files, perform the following steps in the **Attachments** section:

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

Link Docume	nt Upload Docum	ent					
No Attachment	ts available						
File View	Status Docume	ent Na Url	/Link Title	Upload	ded By	Uploaded Date	File Size
▣ ☞ 土							
TRACIMENTS				_	_		
TACHMENTS				m			
	Notes :			-			
Ren	naining Amount (\$)			0.00			
0							
Proba	ble Expenditure (\$) :			0.00			
Ex	pended Amount (\$) :			0.00			
Aut	horized Amount (\$) :			0.00			
	Account Priority :	CON03-CON0	)4	~			
	Account Number .	13100430272	01.340.CN.970	0.04.1			
- Save a LAIC	Lo save & continue	Cancel	Me WORKTION	~ 7	Select Actin	ons 👻	

Figure 68: Using Upload Document Option

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

	N = "	EHWA > Publishe	× C	Search D	ubliched PDE	0
		riting / rubisite	v U	Search	ubished FDr	~
Organize • Ne	ew folder				≣• □	
Home		Name	^		Date modified	
		A01_Library_Managem	nent_PG_ditamap-1	0001	5/24/2023 3:08 PM	
	-	A01_Library_Managem	nent_PG_ditamap-1	10002	5/25/2023 5:23 PM	
Desktop	*	A01_Library_Managem	nent_PG_ditamap-1	10002	5/25/2023 5:23 PM	
Documents	, II.	A01_Library_Managem	nent_PG_ditamap-1	10004	5/30/2023 11:04 AI	M
🛓 Downloads	*	A01_Library_Managem	nent_PG_Draft		5/29/2023 10:06 PM	N
Pictures	*	Adding_an_Engineers_	Estimate_Item_dita	-1000	6/21/2023 12:29 AI	М
Music	*	Adding_an_Engineers_	Estimate_Item_dita	Addin	6/15/2023 1:03 PM	
Videos	*			_		
	File name:		v	All files		Ŷ
				00	en Cance	al

Figure 69: 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 70: 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.

OJECT FUND LIST											
Save & Exit 🚺 Sav	e & Continue	🙁 Ca	ncel 🗗	Workflow	- <u>*</u> °*	Select A	ctions 👻				1
ALLOUI	ILINUIIIDEI -	131004	5027201.3	40.011.0700	U4. I						
Accou	nt Priority :	CON03	-CON04		~						
Authorized A	mount (\$) :				0.00						
Expended <i>F</i>	(\$) (\$)				0.00						
Probable Expe	nditure (\$) :				0.00						
Remaining A	(\$) (\$				0.00						
	Notes :										
					7/						
TACHMENTS											
! 🖻 🕹											
File View Status	Document N	lame	Uri/Link	Title			Uploaded	By U	ploaded Date	File Siz	e.
	Fund Manage FHWA.docx	ment in		Docu	ment - FM	1	Mike Ross	07	-27-2023 3:05 AM	и 13 кв	
ink Document U	pload Docum	ent									

#### Figure 71: 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.

Save & Exit	Save & Continue	🛞 Cancel	🕅 Workflow 🔻	🕻 Se	lect Actions	•	
	Account Number .	1310043027	201.340.011.7700.04	H. I			
	Account Priority :	CON03-CON	04	~			
Aut	horized Amount (\$) :		0.0	00			
Ex	pended Amount (\$) :		0.1	00			
Proba	ble Expenditure (\$) :		0,1	00			
Ren	naining Amount (\$) :		0.1	00			
	Notes :			<b>A</b>			
TACHMENTS				7//			
i 🗹 土	-						
File View	Status Docume	ent Na Url	/Link Title	Uploaded	l By Up	loaded Date	File Size
No Attachment	s available						
Link Docume	nt Upload Docum	ent					

Figure 72: Using Link Document Option

The Link Document dialog box is displayed.

ink Document			2
MasterWorks Document	O Upload and Link New Document	O External Document	
Folder : Rn-FHW	A-2607, RESTORATION OF NORTHERN R/	AILS 🗸	
	Sea	rch Clear Search	
Document Name	Title	Created By	Created Date
No Link available			
No Link available	Title	Created By	Created Dat
	01/	Company	



2. Click Masterworks Document.

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

Figure 74: Using Masterworks Document Option

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

0	MasterWorks Document	pload and Link New Document	External Document	
	Folder : Rn-FHWA-2607, 1	RESTORATION OF NORTHERN RA	ILS 🗸	
]	Document Name	Title	Clear Search Created By	Created Date
ו	Fund Management in FHWA.docx	Document - FM	Mike Ross	07-27-2023 3:17 AM

Figure 75: List of Documents

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

Link Document		×
MasterWorks Document	O Upload and Link New Docume	nent O External Document
Folder : SIT - CA	HBP CR104(1) ET AL, SIT - TRINITY (	COUNTY HBP BRIDGES  Search Clear Search
Document Name	Title	Created By Created Date
No Link available		
	ОК	Cancel

Figure 76:Using Search Option

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

- Optionally, to view all the files in the selected folder, click **Clear Search**.
  - 5. Click **OK**. The files are linked to the form and are displayed in the **Attachments** section.

PROJECT FUND LIST							
🗈 Save & Exit 🛛 🐻 Save &	Continue	Cancel	🕅 Workflow 🔻	Select Actions 💌			<b>* *</b>
Account P	riority :	CON03-CON0	)4 🗸				<b>A</b>
Authorized Amo	unt(\$):		0.00				
Expended Amo	unt (\$) :		0.00				
Probable Expendit	ure (\$) :		0.00				
Remaining Amo	unt (\$) :		0.00				
	Notes :		A.				
ATTACHMENTS							
File View Status	Docume	nt Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size
	Fund Mar FHWA.do	nagement in cx	RESTORATION OF NORTHERN RAILS/Documents	Document - FM	Mike Ross	07-27-2023 3:25 AM	12.77KB
Link Document Uploa	ad Docume	ent					
4 6							Þ

Figure 77: Linked Document

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

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

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

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

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

1. In the Attachments section, click Link Document.

PROJECT FUND LIST			
Save & Exit Save & Continue	🛞 Cancel 🛛 🗗 Workflow 👻	🐮 Select Actions 👻	<b>* *</b>
ACCOUNT NUMBER .	1010045027201.040.011.7700.04.1		
Account Priority :	CON03-CON04 🗸		
Authorized Amount (\$) :	0.00		
Expended Amount (\$) :	0.00		
Probable Expenditure (\$) :	0.00		
Remaining Amount (\$) :	0.00		1
Notes :			
ATTACHMENTS			
i ⊯ ±			
File View Status         Docume	nt Na Url/Link Title U	Iploaded By Uploaded Date	File Size
No Attachments available			
Link Document Upload Docume	nt		
4 🗲			

#### Figure 78: Using Link Document Option

The Link Document dialog box is displayed.

Link Document			×
MasterWorks Document	O Upload and Link New Document	O External Document	
Folder : Rn-FHW	A-2607, <b>R</b> ESTORATION OF NORTHERN RA	AILS 🗸	
	Sea	orch Clear Search	
Document Name	Title	Created By	Created Date
No Link available			

Figure 79: Link Document Dialog Box

2. Click Upload and Link New Document.

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

Figure 80: 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.

Save & Exit (36) Car	ice		
Title	:	EHWA_Restoration of Northern Ra	
New Document	;		Select file
Template Document	;	Used as Template Document for Mail Merge)	
Workflow	5	None	

Figure 81: New Document Page

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

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

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

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

1. In the Attachments section, click Link Document.

PROJECT FUND L	IST							
Save & Exit	Save & Continue	🛞 Cancel	函 Workflow	* <u>2</u> * s	Select Actions	•		++
	ACCOUNT NUMBER .	13100430272	.01.340.011.7700.0	+. 1				
	Account Priority :	CON03-CON0	4	~				
Auth	norized Amount (\$) :		0.	00				
Exp	pended Amount (\$) :		0.	00				
Proba	ble Expenditure (\$) :		0.	00				
Ren	naining Amount (\$) :		0.	00				
	Notes :			▲ ▼/				
ATTACHMENTS								
Ū 🗹 🕹								
File View	Status Docume	nt Na Url/	'Link Title	Upload	ed By Upl	loaded Date	File Size	
No Attachment	s available							
Link Docume	nt Upload Docume	nt						

Figure 82: Using Link Document Option

2. Click External Document.

Link Document		×
O MasterWorks Document	Upload and Link New Document	External Document
Url/Link : http:	5://	
Title :		
	OK Cancel	

Figure 83: 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.

## 4.1.2. 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.

Projecto		PROJEC	T FUND LIST								
Type to Search	× × ^	_Ø Edil	♦ View	🗊 Delete	🕅 Warkflow 🕶	·Ľ	Select Actions *	•	Reports 🔹 🛃 Mail Merge 👻 💮 Mo	re 🕶	1 Sole
SIT TRINITY COUNTY HEP BRI	DGES 👻	0	Project Fu	und ID	Fund Source Name		Fund Source Code		Account Number Account Priorit	Y	Workflow Status
General	Quick Access			T		T		т	T	T	T
ST. DINITY COUNTY HER BRIDGES			PFL-2	:	CON02		CON02		15A6060010401-540.C CON02-CON01		Published
+ Documents = Document Search = Project Report Collery = Project Calendar			PFL-1		COND1		CON01		1586060019401 540.C		Published
= Project Fund List											

#### Figure 84: Using Select Actions Option

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

	3		11		
	٢				
					44
Title	Uploaded By	Uploaded Date	File Size	GPS Latitude	GPS Longitude
	Title	Title Uploaded By	Title Uploaded By Uploaded Date	Title Uploaded By Uploaded Date File Size	Title Uploaded By Uploaded Date File Size GPS Latitude

Figure 85: Masterworks Dialog Box

3. In the Attachments section, click Upload Document.

> × ^		FHWA > Publishe	~ C	Search F	Published PDF	Q
Organize • New	v folder				≣• □	
Home		Name	0		Date modified	
		A01_Library_Managem	ent_PG_ditamap-1	10001	5/24/2023 3:08 PM	
		A01_Library_Managem	ent_PG_ditamap-1	10002	5/25/2023 5:23 PM	
Desktop 🤉		A01_Library_Managem	ent_PG_ditamap-1	10002	5/25/2023 5:23 PM	
Documents	, I	A01_Library_Managem	ent_PG_ditamap-1	10004	5/30/2023 11:04 AM	M
🛓 Downloads 🤉	*	A01_Library_Managem	ent_PG_Draft		5/29/2023 10:06 PM	N
Pictures	*	Adding_an_Engineers_I	Estimate_Item_dita	a-1000	6/21/2023 12:29 At	N
🕑 Music 🗦	*	Adding_an_Engineers_I	Estimate_Item_dita	Addin	6/15/2023 1:03 PM	
Videos 🤇	*	-		_		
F	File name:		v	All files		~

The **Open** dialog box is displayed.

Figure 86: 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**.

Open						0
$\leftrightarrow \rightarrow \checkmark \uparrow$		FHWA > Publishe	~ C	Search F	Published PDF	Q
Organize • New	folder				≣ • 0	] (]
A Home		Name	^		Date modified	
		A01_Library_Manageme	ent_PG_ditamap-	10001	5/24/2023 3:08 P	M
		A01_Library_Manageme	ent_PG_ditamap-	10002	5/25/2023 5:23 P	М
Desktop 🤉	e 👘	A01_Library_Manageme	ent_PG_ditamap-	10002	5/25/2023 5:23 P	М
Documents 3		A01_Library_Manageme	ent_PG_ditamap-	10004	5/30/2023 11:04	AM
🛓 Downloads 🤉	e	A01_Library_Manageme	ent_PG_Draft		5/29/2023 10:06	PM
Rictures 🤉	*	Adding_an_Engineers_E	stimate_Item_dit	a-1000	6/21/2023 12:29	AM
🕑 Music 🦪	÷	Adding_an_Engineers_E	stimate_Item_dit	aAddin	6/15/2023 1:03 Pi	М
Videos 🤉	*	-		_		
F	ile name:		~	All files		~
				Op	en Can	cel

Figure 87: 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.

	Notes :	Approved			1.2	
Set Days To Complete for	Next Stage :	2	0	) i		
ACHMENTS						
File View Status	Document Name		Title	Uploaded By	Uploaded Date	File Size
]	FHWA n	otes.docx	Project Fund Document	🖉 John	12/11/2023 4:58 AM	32 KB
Jelead Decument						
upioad Document						

Figure 88: Updating Title for the Attached File

7. Click **OK**. You can access the attached file from the Workflow Status and History dialog box. For more information, refer to <u>Section 4.3.2</u>. Viewing the Workflow History.
## 4.1.3. Accessing and Downloading Attached Files

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

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

	PROJECTS	PRC	DJECT F	UND LIST				
Q,	Type to Search 🗙 🗙 🔨	Ð,	New 🕅 Workflow 👻 🖹 Reports 🔹 🖧 Excel Export 👻 💬 More 👻					
	SIT - CA ERFO FS LSPDR 2023-1(1 🔻		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
誦	General Quick Access			T	T	T	<b>T</b>	T
em 8				PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	. SH - CA ERFO FS LSPDR 2023-1(1)			PFL-3	CON03	CON03	CON	Option X
<b>(</b> \$}	+ Documents			PFL-2	CON02	CON02	CON	CLIN00101: ERFO
	Document Search			PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO
	Project Report Gallery	-						
	<ul> <li>Project Calendar</li> </ul>							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	Project Fund Transaction							
	Funding Rules							

Figure 89: Project Fund List Page

The form list page is displayed.

2. Click More, and then click Attachments.

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

Figure 90: Using Attachments Option

The attachments of all the records are listed.

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



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

PRO	PROJECT FUND LIST								
_0	Edit	💿 View 🔟 Delete	🔄 Workflow 👻 🗐	Reports 👻 🧧 Mail M	erge 💌	💮 More 💌			
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund So	Attachme	Description		
		PFL-2	CON02	CON02	CON				
		PFL-1	CON01	CON01	CON		TS90		

Figure 92: Viewing Files Attached to a Record

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

	PROJECTS	PRC	JECT F	UND LIST				
Q,	Type to Search 🗙 🗙 🔨	Ð,	New	🕅 Workflow 👻 📋	Reports 👻 📴 Excel Ex	kport 🔹 💮 More 🔹		
	SIT - CA ERFO FS LSPDR 2023-1(1 💌		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
<b>I</b> ∰	General Quick Access			T	T	T	<b>T</b>	
en A	SIT. CA EREO ES I SPDR 2022 1/1)			PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	1 511 ° CA ERPO PS ESPOR 2025*1(1)			PFL-3	CON03	CON03	CON	Option X
<b>(</b> 3)	+ Documents			PFL-2	CON02	CON02	CON	CLIN00101: ERFO
	Document Search			PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO
	<ul> <li>Project Report Gallery</li> </ul>							
	Project Calendar							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	Project Fund Transaction							
	= Funding Rules							

Figure 93: Project Fund List Page

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

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

Figure 94: Using View Option

## The form details page is displayed.

PROJECT FUND LIST							
_🖉 Edit 🏽 Cancel 🗗 Wo	orkflow 👻						
Project Fun	nd ID : PFL-3						
Fund Source Na	ame *: CON03						
Fund Source C	Code : CON03						
Fund Source T	Type : CON						
Fund Source Categ	gory : FLAP						
Fund Descrip	otion :						
Account Num	nber : 1516043027201.540.CN.V700.04. 1604000000.25255						
Account Pric	ority : CON03-CON04						
Authorized Amoun	nt (\$) : 0.00						
Expended Amoun	nt (S) : 0.00						
Probable Expenditure	re (\$) : 0.00						
Remaining Amoun	nt (\$) : 0.00						
N	otes :						
ATTACHMENTS							
<b>≤</b>							
File View Status	Document Name Url/Link Title Uploaded By Uploaded Date File Size						
Ready	Fund Management in         NA         Mike Ross         07-27-2023 4:31 AM         12.77KB           FHWA.docx         Mike Ross         07-27-2023 4:31 AM         12.77KB						
Ready	PFL with data.jpg         NA         Mike Ross         07-27-2023 4:30 AM         92.13KB						

Figure 95: Project Fund List Page in View Mode

3. In the **Attachments** section, select the appropriate files, and then click  $\overset{*}{ hinstyle}$  .

PROJECT FUND LIST	PROJECT FUND LIST							
_🖉 Edit 🏽 Cancel 📲 N	Norkflow 🔻					1	+ +	
Account P	riority : CON03-CON	04						
Authorized Amou	unt (\$) :		0.00	l				
Expended Amou	unt (\$) :		0.00					
Probable Expendit	ure (\$) :		0.00					
Remaining Amou	unt (\$) :		0.00					
	Notes :		A					
ATTACHMENTS	L		7//					
s 🛨							11	
File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size		
Ready	<u>Fund Management in</u> <u>FHWA.docx</u>	NA		Mike Ross	07-27-2023 4:31 AM	12.77KB		
Ready	PFL with data.jpg	NA		Mike Ross	07-27-2023 4:30 AM	92.13KB		
4								

Figure 96: Using Download Option

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

PROJECTS			DJECT F	UND LIST				
Q,	Type to Search 🗙 🗙 🔨	Ð	New	🕅 Workflow 👻 📋	Reports 🔹 🗄 Excel Ex	port 🔹 💮 More 👻		
諭	SIT - CA ERFO FS LSPDR 2023-1(1 💌		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
讘	General Quick Access			Ī	<b>T</b>		T	T
e m 🕄				PFL-4	CON04	CON04	CON	CLIN00101: ERFO
	311 * CA EKPO P3 E3PDR 2023*1(1)			PFL-3	CON03	CON03	CON	Option X
<b>(</b> \$}	+ Documents			PFL-2	CON02	CON02	CON	CLIN00101: ERFO
	Document Search	П		PFL-1	CON01	CON01	CON	CLIN00101: Non-ERFO
	Project Report Gallery	-						
	<ul> <li>Project Calendar</li> </ul>							
	<ul> <li>Fund Management</li> </ul>							
	Project Fund List							
	Project Fund Transaction							
	Funding Rules							

Figure 97: Project Fund List Page

The form list page is displayed.

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

#### Federal Highway Administration

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

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

Figure 98: Using History Option

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

The Workflow Status & History dialog box is displayed.

Figure 99: Workflow Status & History Dialog Box

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

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

Figure 100: Using More Details Option

The **History** page is displayed.

	OKT					
(*)	lose					
Record	d Identifier : PFL-4/CON04					
Wor	kflow Status					Hide 🖌
	Selected Status	Current Status				
• Dra Pul	aft Diish	Published Approve	•	Approved	Inactive	End Stage
Wor	kflow History					Hide
<b>K</b> War	kflow History	Action Pending	Action Completed	Action Failed 🖉 Workflor	w Completed	Hide
Wor	kflow History Status	Action Pending	Action Completed	Action Failed Workflor Action Notes	w Completed Action On	Hide 🗸
Wor	kflow History Status	Action Pencing Received On	Action Completed	Action Failed Workflor Action Notes	v Completed Action On	Action By

Figure 101: History Page

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

HIST	ORY											
🛞 с	(i) Close											
	Draft	07-26-2023 7:34 AM	Publish			07-26-2023 7:34 AM	User10	-				
9	Published	07-26-2023 7:34 AM	Approve			07-27-2023 5:32 AM	Mike@0	1				
	Approved	07-27-2023 5:32 AM						Ţ				
∢ ∈				)				•				
			Show We	orkflow History Re	port							
ATTA	ACHMENTS											
ø	Ł											
	File View Status	Document Name	Url/Link	Title	Uploaded I	By Uploaded	Date	File Size				
		Fund Management in FHWA.docx	NA		Mike Ross	07-27-202	3 5:32 AM	12.77KB				

Figure 102:Using Download Option

## 4.1.4. 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.

PROJECTS			PRO	DJECT	FUND LIST			
Type to Search	×	~ ^	Ð	New	🙀 Workflow 👻	📓 Reports 👻 💱 B	Excel Export 👻 💮	More 👻
SIT - TRINITY COUNTY HE	BP BRIDGES	*		0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Typ
General	Quick A	cess			PFL-2	CON02	CON02	CON
+ Documents	<ul> <li>SIT - TRINITY COUNTY HBP BRIDGES</li> <li>+ Documents</li> </ul>				PFL-1	CON01	CON01	CON
Document Search								
<ul> <li>Project Report Gal</li> </ul>	llery							
<ul> <li>Project Calendar</li> <li>Fund Managemen</li> </ul>	t							

Figure 103: Project Fund List Page

The form list page is displayed.

b. Click More, and then click Attachments.

PRO	PROJECT FUND LIST											
🗜 New 🕅 Workflow 👻 🖆 Reports 👻 💱 Excel Export 👻 💮 More 💌												
	Image: Description of the second s		Fund Source Name	Fund So	Customize List		urce Type					
	0	PFL-4	CON04	CON04	R Audit Log	g						
		PFL-3	CON03	CON03		CON						
		PFL-2	CON02	CON02		CON						
		PFL-1	CON01	CON01		CON						

Figure 104: Using Attachments Option

### The attachments of all the records are listed.

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

Figure 105: List of Attachments

Various document management features are available for attachments.

ATTA	ATTACHMENTS											
Ū												
~	File View Status Document Name Url		Url/Link	Title	Uploaded By	Uploaded Date	File Size					
	Ready	Project Fund List Attac hments FHWA	NA	Project_Fund_List_	Angela	12/14/2023 6:32 AM	7574.29KB					
Lin	k Document Uploa	d Document	12									

Figure 106: Using Delete Option

# 4.2. 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:

- 4.2.1. Generating and Viewing Reports
  - o <u>4.2.1.1. Generating a report</u>
  - o 4.2.1.2. Printing a report
  - o <u>4.2.1.3. Saving a report in various formats</u>
  - o <u>4.2.1.4. Updating report to view the latest information</u>
- <u>4.2.2. Subscribing to a report</u>

## 4.2.1. Generating and Viewing Reports

You can generate reports for different information views for all the forms in the application. Masterworks enables you to use report filters to generate reports with specific information. You can perform the following report functions:

- <u>4.2.1.1. Generate a report</u>
- <u>4.2.1.2. Print a report</u>
- <u>4.2.1.3. Save a report in various formats</u>
- <u>4.2.1.4. Update report to view the latest information</u>

## 4.2.1.1. 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

- 1. Perform any of the following steps, as applicable:
  - In the form list page, click **Reports**, and then click the appropriate report.

PR	OJECT	FUND LIST				
Ð	New	┣ Workflow マ	📔 Reports 🔻	Bit Exce	I Export 🔻	💮 More 🔻
0		Project Fund ID	🗜 List Page F	Report	Fund So	urce Code
		PFL-2	CON02		CON02	

Figure 107: Using Reports Option

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



Figure 108: 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 109: Contract Report Gallery Navigation Page

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

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

Figure 110: Using View Report Option

The report is generated and displayed.

# 4.2.1.2. Printing a Report

## Steps

1. Generate the required report.

For more information, refer to <u>Section 4.2.1.1. Generating a Report</u>.

2. In the report toolbar, click Print Report.

LIST PAGE F	LIST PAGE REPORT										
🕞 Back	🛯 Subscrib	e									
Include Pending on Users and Roles No.											
4	of 1 🕨 🌢			Find   Net	d <b>⊡ • 5</b>						
	PROJECT FUND LIST - LIST REPORT										
Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaininį Amount (s	
PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00	
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00	

Figure 111: Using Print Report Option

## 4.2.1.3. Saving a Report

## Steps

1. Generate the required report.

For more information, refer to <u>Section 4.2.1.1. Generating a Report</u>.

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

PROJECT STATUS REI	PORT							
🕞 Back 🛛 💩 Sul	oscribe							
Report Version	Active Projects	Ý	F	Percent Con	nplete Greater Ti	han 90		
Positive \$ Value Differe	nce 100000		٩	Vegative \$ V	alue Difference	100000		
View Report								
┥ ┥ 🚺 of 1 🛛		Find	Next		> 🖻	с. 	^	
			4	Excel				
				PDF CSV (com	ma delimited)			
Project Number Pro	oject Name	Contract number	COE	8	Award Date	Original FCD	Modified FCD	Acceptance Date

Figure 112: Exporting a Report

## 4.2.1.4. Viewing Latest Information in a Report

### Steps

- 1. Generate the required report. For more information, refer to <u>Section 4.2.1.1. Generating a Report</u>.
- 2. In the report toolbar, click **Refresh** 5.

LIST PAGE	REPORT										
Back	\land Subscri	be									
Include Pending on Users and Roles No 🗸											
<b> </b> ◀ 1	I of 1 ▶ ▶ ■ Find   Next ■ ✓ ☑										
	PROJECT FUND LIST - LIST REPORT										
Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaininį Amount (\$	
PFL-1	CON01	CON01	CON	FLAP	This project fund list for fund source category FLAP.	1516043 027201.5 40.CN.V7 00.04.16 0400000 0.25255		0.00	0.00	0.00	
PFL-2	CON02	CON02	CON	FLAP		1516043	CON02-	0.00	0.00	0.00	

Figure 113: Using Refresh Option

## 4.2.2. Subscribing to Reports

## Prerequisites

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

#### **Overview**

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

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

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

- **Email**: The report is delivered through email to the specified email addresses in the specified formats. **Note**: Only Masterworks registered email address is allowed to receive the subscribed reports.
- File Share: The reports are saved to the specified location in the specified formats.
   Note: Users with the appropriate permission can subscribe themselves or others to a report. Only users with the Administrator role can remove or end an active subscription once it is created.

## Steps

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

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

Figure 114: Subscribing a Report

The subscription dialog box is displayed.

SIT Testing Build- FHWA e	Delivery		×
Delivery Option	Schedule Details	5	
Please select the delivery op	ption		- 1
E-Mail O Windows F	ile Share		- 1
	то *:		- 1
	Cc :		- 1
	Bcc :		- 1
		(Use (;) to separate multiple e-mail addresses.)	- 1
	Reply-To :		- 1
	Subject *:		- 1
	Priority :	Normal 🗸	- 1
	Comment :		- 1
		Include Report	- 1
		✓ Include Link	
Rej	port Format :	PDF ~	
	Start Date :	07-27-2023 🗸	
Enable sc	hedule stop :	Π	ų

Figure 115: 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:

En	nail	Wi	indows File Share
а.	In the <b>To</b> box, enter the email	a.	In the <b>File Name</b> box, enter the file name for the
	addresses of the recipients of the		report.
	report.	b.	Select the Add a file extension when the file is
b.	In the <b>Reply-To</b> box, enter the		<b>created</b> check box to save the report file name with
	email addresses of the recipients		the extension of the file format as required for the
	to whom the reply email must be		report.
	delivered.	c.	In the <b>Path</b> box, enter the path of the shared file
с.	In the <b>Subject</b> box, enter the		location where the report must be saved.
	name of the report or any other		Note: To configure the shared file location in the
	appropriate subject for the email.		application, you must provide the file path location to
d.	From the <b>Priority</b> drop-down list,		the Administrator.
	select the priority of the email. If	d.	From the <b>Report Format</b> drop-down list, select the
	the selected priority is <b>High</b> , the		format in which the report must be generated and
	email will be sent as a High Priority		saved.
	notification.	e.	In the <b>Credentials used to access the file share</b>
e.	In the <b>Comment</b> box, enter any		section, enter the credentials to access the shared
	comment for the email.		location and save the report.
	Comments are included in the	f.	From the <b>Overwrite options</b> section, click any of the
	body of the email.		following options:
f.	Select the Include Report check	٠	Overwrite an existing file with a newer version-
	box to deliver the report in the		When saving the report at the file location at the
	selected format as an email		scheduled time, if a file with the same name exists,
	attachment.		then the existing file is overwritten by the latest
g.	Select the Include Link check box		report.
	to deliver the link to the report in	•	Do not overwrite the file if a previous version
	the report delivery email. The		exists- When saving the report at the file location at
	recipient can view the report on		the scheduled time, if a file with the same name
	the application only if the recipient		exists, then the report is not overwritten by the latest
	has the required permissions on		report, and the report is not saved at the file location.
h	The report.	•	Increment file names as newer versions are added-
n.	down list coloct the format drop-		When saving the report at the file location at the
	which the report must be		scheduled time, if a file with the same name exists,
	generated and delivered to the		then the latest report is saved with the same name
	specified email addresses		appended with a sequential number.
	specified effiait addiesses.	g.	From the Start Date list, click the date from when the
1			report must be saved.

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

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

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

Figure 116: 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.	<ul> <li>a. Click Hourly in the delivery options list.</li> <li>b. In the Run the schedule every section, enter the frequency of report delivery: <ol> <li>In the hours and minutes boxes, enter the time period in hours and minutes the report must be periodically delivered.</li> <li>In the Start time (hh:mm) box, enter the time (in 24-hour format) the report delivery must begin.</li> </ol> </li> </ul>
Daily	The report is delivered once on preset days, or periodically as defined.	<ul> <li>a. Click <b>Daily</b> in the delivery options list.</li> <li>b. In the schedule definition section, enter the frequency of report delivery:</li> <li>Click <b>Every Weekday</b> to get the report delivered on all weekdays, from Monday to Friday.</li> </ul>

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

Option	Description	Steps
		<ul> <li>the 12<sup>th</sup> of a month, and the calendar days set is 10, then the report is sent for 10 days from the 12th of every selected month.</li> <li>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) by when the report must be delivered.</li> </ul>

## 4.2.3. Unsubscribing to Reports

For information on unsubscribing to reports, refer to **Unsubscribing to a Report** in the **Administration Guide**.

# 4.3. 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:

- 4.3.1. Performing Workflow Status Transitions
- <u>4.3.2. Viewing the Workflow History</u>
- <u>4.3.3. Selecting Workflow Users</u>
- <u>4.3.4. Associating a Workflow</u>

## 4.3.1. Performing a Workflow Action

## Prerequisites

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

## Overview

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

#### Steps

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

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

- 2. Perform any of the following steps, as applicable:
  - Select the appropriate record.

PR	PROJECT FUND LIST									
🖋 Edit 🐵 View 🔟 Delete 🕅 Workflow + 🦹 Select Actions + 📋 Reports + 🛃 Weil Merge + \ominus Nore +										
	0	Project Fund ID		Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status
				<b>T</b>		T		T	Y	
		PFL-4		CON04	CON04	CON	15FCA 14(4) Funding	15A7302501404 R40.C		Approved
		PFL-3	:	CON03	CCN03	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved
		PFL 2		CON02	CON02	CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02 CON04	Approved

Figure 117: Selecting a Record

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

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

Figure 118: Selecting Multiple Records with the same Workflow Status

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

PR	PROJECT FUND LIST									
_0	Edit	👁 Vlew 👖 Delete	🕅 Workflow 👻 📲	Select Actions 🔻 📳	Reports 👻 🛃 Mall Me	rge 🔹 💮 More 🔹				
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status	
		Ť	T	T	T	T	T	T	T	
		PFL-4	CON04	CON04	CON	15F0A 14(4) Funding	15A7302601404 R40.C		Approved	
		PHL-3	CON03	COND3	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved	
		PFL-2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 11	1517302601404 540.C	CON02-CON04	Approved	

Figure 119: Editing a Record

The Project Fund List page is displayed.

#### Federal Highway Administration

🕉 Cancel 📲 Workflow 👻 📽	Select Actions 🔻
Project Fund ID	: PFL-4
Fund Source Name	*: CON04
Fund Source Code	: CON04
Fund Source Type	: CON
Fund Source Category	: GAOA
Fund Description	: 15F0A 14(4) Funding
	/h 🔻
Account Number	: 15A7302601404 R40.CN.15F0.30 1730001426 25255
Account Priority	:
Authorized Amount (\$)	: 0.01
Original Authorized Amount (\$)	: 0.01
Expended Amount (\$)	: 0.00
Probable Expenditure (\$)	: 0.00
Remaining Amount (\$)	• 0.01
Remaining Amount (\$) Notes	:

#### Figure 120: Project Fund List Page

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

PR	PROJECT FUND LIST								
Ĵ	Edit	👁 View 🔟 Delete	剧 Workflow -	Select Actions 🔹 📔	Reports 👻 📓 Mail Mer	rge 🔹 💮 More 🔹			1 Selected X
	0	Project Fund ID	Fund Source Name	Return to Published	Fund Source Type	Fund Description	Account Number	Account Priority	Workflow Status
				Mark as Inactive.	<b>T</b>		T	<b>T</b>	T
		PFL-4	CON04	5	CON	15F0A 14(4) Funding	15A7302601404 R40.C		Approved
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER	1517303700141 540.C		Approved
		PFL-2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14	1517302601404 540.C	CON02-CON04	Approved

Figure 121: Using Select Actions Option – List Page

PROJECT FUND LIST	
③ Cancel A Workflow ▼	Select Actions 🔻
Project Fun <sup>Re</sup> Fund Source Na	eturn to Published ark as Inactive
Fund Source Code	: CON04
Fund Source Type	: CON
Fund Source Category	: GAOA
Fund Description	: 15F0A 14(4) Funding
Account Number	: 15A7302601404 R40.CN.15F0.30 1730001426 25255
Account Priority	:
Authorized Amount (\$)	: 0.01
Original Authorized Amount (\$)	: 0.01
Expended Amount (\$)	: 0.00
Probable Expenditure (\$)	: 0.00
Remaining Amount (\$)	: 0.01
Notes	:
	li. 🔻

Figure 122: Using Select Actions Option – Details Page

Available actions are based on the definition of the associated workflow. The **Masterworks** dialog box is displayed.

MasterWorks				×
	Notes : Validated t	he information added fo	r the fields.	11
Set Days To Complete for Ne	ext Stage : 2		(?)	
ATTACHMENTS				
Ē				
File View Status	Document Name	Title	Uploaded By	Uploaded Date File Size
No Attachments available				
Upload Document				
			ОК	Cancel

#### Figure 123: 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.

#### Note

- The number mentioned in this field determines the due date to complete the workflow action for the next workflow status.
- If the field is empty, the application applies the default number of days set for the respective workflow.
- If you want to override the default days set for the respective workflow, you need to enter the appropriate number in this field.

MasterWorks				×
Set Days To Complete for No	Notes : Validated t	he information added for	the fields.	4
ATTACHMENTS				
	Bacumant Nama	-	Intended By	Unloaded Data File Size
No Attachments available				
Upload Document				

Figure 124: Set Days To Complete for Next Stage

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

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

7. Click OK.

## 4.3.2. 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.

PRO	ојест р	UND LIST				
_0	Edit	📀 View 🛛 🔟 Delete	🛃 Workflow 👻 🧣	Select Actions 👻 📓 🛛	Reports 👻 👩 Mail Mei	rge 🕶 💮 More 🕶
	0	Project Fund ID	Fund Source Name	Fund Source Code	Fund Source Type	Fund Description
		T	T	T	Т	T
		PFL-4	CON04	CON04	CON	15F0A 14(4) Funding
		PFL-3	CON03	CON03	CON	FLAP Funding MT NPS GLACIER
		PFL-2	CON02	CON02	CON	FLAP Funding MT NPS GLAC 14

Figure 125: Selecting a Record

2. Click Workflow, and then click History.

1.1		and the second second		
_0	Edit	💿 View 🔟 De	lete 🗗 Workflow 🔻	🐮 Select Actions 👻 📓 🛙
	9	Project Fund ID	History	nd Source Code
		PFL-4	:	IN04
		PFL-3	CON03	CON03

Figure 126: Using History Option

The Workflow Status & History dialog box is displayed.

Workflow Status			
			Hide 🔺
Selected Sta	atus <u> </u>	rent Status	
Published     Approve		Approved	
Workflow History			Hide 🔺
Workflow Status : P	ublished	Workflow Status :	Approved
Received On: 0	7-26-2023 7:34:08 AM	Received On :	07-27-2023 5:32:06 AM
Action: A	pprove	Action :	
Action Notes :		Action Notes :	
Action By : M	/like Ross	Action By :	
Due Date: 0	7-26-2023 7:34:08 AM	Due Date :	07-27-2023 5:32:06 AM
	ction Completed	Action Status :	Action Pending

Figure 127: 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 128: More Details option

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

niste							
ē) (1	lose						
cord	i Identifier : PFL-4/CON04						
Nori	kflow Status						Hide 🔨
	Selected Status	Current Status					
					inactive	• End Stage	
	14 C		ind	Anorment		Participation of the second	
Dra	il.	Publish	ico	Company and the second			
Dra Pub	ift	Approv	e 🔴	- Abbrased			
Pub	alt	Approv	e •	- Approved			
Dra Pub	nt olish e	Approv	e •	- Allanda			
Dra Pub Vori	kflow History	Approv	e •				Hide ^
Dra Put	kflow History	Approv	e •	ed Action Failed	rkflow Completed		Hide ^
Dra Put	kflow History Status	Approv	e Action Complete	ed Action Failed Wor	rkflow Completed Action On	Action By	Hide ^
Dra Pub Vork	Kflow History Status	Approv Approv Action Pendin Received On	e Action Complet Action	ed Action Failed Wor Action Notes	rkflow Completed Action On 了	Action By	Hide A
0 Dra Pub Vork	nt olien Kflow History Status	Action Pendin Received On Control Control Cont	g Action Complet Action	ed Action Failed Wor Action Notes	rkilow Completed Action On 了	Action By	Hide ^

Figure 129: 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.

HISTO	DRY							
(¥) cl	ose							
Record	Identifier : PFL-4/CON0	1						
	flow Status							Hide ^
	Selected Status	Current Status						
• Dra Pub	rt Ilsh ●	Publishe Approve		Approved	• Inactive	End Stage		
4								E.
Work	flow History							Hide 🔥
			Action Pending Act	tion Completed 📕 Action F	ailed 📕 Workflow Comple	eted		- 1
0	Status	Received On	Action	Action Notes	Action On	Action By	Action By User Name	Action Mes
	Approved	1 🖬 🗟 🝸	T	T	1 0 T	T		
	Approved	11/21/2023 B-37 AM						
4								•
				Show Workflow History Rep	oort			

Figure 130: 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.

ŀ	HISTO	RY											
8	) Clo	ose											
		Draft	07-26-2023 7:34 AM		Publish				07-26-2023	7:34 AM	User10		*
	0	Published	07-26-2023 7:34 AM		Approve				07-27-2023	5:32 AM	Mike@0	1	
		Approved	07-27-2023 5:32 AM										
	4											Þ	-
A	TTA	CHMENTS			Show Work	dlow History Re	port						
1	ø	ٹ											
	~	File View Status	Document Name	Url/L	ink	Title		Uploaded E	iy	Uploaded Date	2	File Size	e
			Fund Management in FHWA.docx	NA				Mike Ross		07-27-2023 5:32	AM	12.77KB	

Figure 131: Clicking Document Name

#### Federal Highway Administration

The document is opened in the application viewer.



Figure 132: Viewing a Document in the Application Viewer

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

1	HISTO	RY									
(	) Clo	ose									
		Draft	07-26-2023 7:34 AM	Publish				07-26-2023	7:34 AM	User10	1
	0	Published	07-26-2023 7:34 AM	Approve				07-27-2023	5:32 AM	Mike@01	
		Approved	07-27-2023 5:32 AM								
4		CHMENTS		Show V	vorkflow History Re	port					P
	ø	٤									
	~	File View Status	Document Name	Url/Link	Title		Uploaded B	y	Uploaded Date	F	ile Size
			Fund Management in FHWA.docx	NA			Mike Ross		07-27-2023 5:32	AM 1	2.77КВ

Figure 133: Using Show Workflow History Report Option

## The Workflow History Report is displayed.

WORKFLOW	V HISTORY	REPORT						
Back	D Subs	cribe						
4 4 1	of 1 🕨	) <u> </u>		Find   Next		9 8	đ	
			Workflo	ow Hist	ory Re	port		
Record	Name:	Project Fu	nd List	Record [	Details:	Fund	Source Na	me
Project	Code:	Aurigo SIT GLAC 14(4 GLACIER 1	MT NPS ) & MT NPS 4(1) - RKR	Project N	lame:	Aurig Glacie Road	o - Test Rel er Road & N	nabilitate Many Many Glacier
Status	Pendir Role(s)	ıg On	Received On	Action	Action Name	n User	Action On	Due Date Override
Draft	A/E De Lead Design Manag ions,Ac or,Con Admin Staff,C n Com Lead,D Compo Lead,D oiect M	signer,A/E er,A/E jer,Acquisit dministrat struction onstructio ponent lesign onent lesigner,Pr fanager	12/11/202 3 2:28 AM	Publish	Admir or	nistrat	12/11/20 23 2:28 AM	12/11/2023 2:28 AM

Figure 134: Workflow History Report Page

## 4.3.3. 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)**.

🞝 Nev	🕅 Workflow 🔹 📋 Reports		xport 👻 💮 More
0	Associate	rce Name	Fund Source Code
0	Show Pending On User(s)		CON04
			CON02

Figure 135: Using Workflow User(s) Option

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

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

Figure 136: Published Workflows

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

Workflow User(s)					×
Available Workfl	ows : Custom Project	Fund List 🔹			
C	Stage	Role	User Name	First Name	Last Name
	T	T			T
✓ Stage: Dr	aft				Î
✓ Ro	le: Acquisitions				
C	Draft	Acquisitions	Rama_Acquisitions	Rama	
C	Draft	Acquisitions	Ryanp_Acquisitions	Ryan	Phillips
C	Draft	Acquisitions	Shirley_Acquisitions	Shirley	Anderson
C	Draft	Acquisitions	Dean_Acquisitions	Dean	Umathum
C	Draft	Acquisitions	Antony	Antony	
-	_				
	3 4 5 6 7	8 9 10			Page 1 of 18
Note: '*' indicates the stage has	an action which requires every s	elected user to complete the a	action to move the workflow t	o next stage	

Figure 137: List of Stakeholders

#### Federal Highway Administration

- 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).

PROJE	CT FU	IND LIST					
_Ø Edi	it (	O View	🔟 Delete	卧 Workflow -	📋 Reports 👻	@ Mail M	lerge 🔹 💮 More 🔹
	9	Project Fun	d ID	History	ind Sourc	ce Code	Fund Source Type
		PFL-2			2N02		CON
	1	PFL-1	:	CON01	CON01		CON

Figure 138: Using Workflow User(s) Option

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

Workflow User(s)						×
Workflow assigne	ed for r	ecord : Custom Proj	ect Fund List			
		Stage	Role	User Name	First Name	Last Name
		T				
✓ Stage	: Inact	tive				Î
~	Role:	Acquisitions				
		Inactive	Acquisitions	Rama_Acquisitions	Rama	
		Inactive	Acquisitions	Ryanp_Acquisitions	Ryan	Phillips
		Inactive	Acquisitions	Shirley_Acquisitions	Shirley	Anderson
		Inactive	Acquisitions	Dean_Acquisitions	Dean	Umathum
		Inactive	Acquisitions	Antony	Antony	
4	-					
	2 3	4 5 🕨 📔				Page 1 of 5
Note: '*' indicates the stage	e has an a	action which requires every se	elected user to complete the a	action to move the workflow t	o next stage	

Figure 139: 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.

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

Figure 140: 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.

## 4.3.4. 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 141: Selecting a Form

2. Click Workflow, and then click Associate.



Figure 142: Using Associate Option

#### Federal Highway Administration

## The Workflow Association dialog box is displayed.



Figure 143: Workflow Association Dialog Box

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

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



Figure 144: Using Applying a new Workflow for this List Page and Module Option

Available options are the published workflows for the respective form.

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

Workflow Association	n		×
DEFAULT WORKFLOW	1		
Custom Project Fund Lis	st		
WORKFLOW OVERRIDE	FOR THIS PAGE :		
FHWAProject_WF	Remove		
APPLY A NEW WORKFL	OW FOR THIS LIST	PAGE AND M	DDULE :
Select	~	Apply	

Figure 145: Updated Workflow Override for this Page Field

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

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

Workflow Association	×
DEFAULT WORKFLOW :	
Custom Project Fund List	
WORKFLOW OVERRIDE FOR THIS PAGE :	
FHWAProject_WF Remove	
APPLY A NEW WORKFLOW FOR THIS LISTPAGE AND MOD	OULE :
Select 🗸 Apply	

Figure 146: 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.