



U.S. Department of Transportation
**Federal Highway
Administration**

Document Management Participant Guide



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2. Introduction to Using the Participant Guide

The Participant Guide helps you get started with the process of managing the funds for a project and quickly navigate through the various key processes of fund management.

The options selected for use in this guide are for instructional purposes to showcase the entire lifecycle of fund management. 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. Document Management

The Documents module is a repository that enables you to save, upload, organize, secure, track, and manage project-related documents in electronic form. This well-designed online document management system facilitates file sharing across multiple devices connected on the cloud to enable efficient collaboration among project users.

You can also assign document properties to a document that can be used to search for documents. Additionally, the **ATTACHMENTS** section within a form enables you to manage documents for specific records.

Folders in the **Documents** module enable you to organize and manage documents logically and hierarchically to create an effective knowledge bank of project and contract-related information. You can assign permissions to different folders and sub-folders to restrict access to the documents they contain. You can configure document types which can be uploaded and saved in the Documents module. Additionally, customized workflows automate document-related business processes.

There is no limitation on the number or the size of documents that can be uploaded to the application. However, users assigned with the Administrator role can set the maximum allowable size for the documents to be uploaded in the **Administration** module. Additionally, you can view and annotate various types of documents in the application without installing additional document viewer applications on your system.

The Documents folder is the base for the document management system in Masterworks, and all the document folders that are created are available within it.

The **Documents** folder is available at two levels in the application:

- **Projects** level for project-related documents.
- **Contract** level for contract-related documents.

Additionally, you can search documents at the enterprise and project levels.

The following features are available with the Masterworks Documents module:

- [Create folders hierarchically to ease storage and access of documents](#)
- [Secure documents by defining permissions on folders and documents thus limiting user access](#)
- [View documents of various formats using the document viewer utility without having to install any document viewer applications on your system](#)
- [Upload documents to folders to organize storage of documents](#)
- [Download documents of various file types and versions](#)
- [Update documents](#)
- [Annotate documents to actively participate in the flow of the document content and add analytical or illustrative notes on the document](#)
- [Archive documents that are not currently in use](#)

- [Store comments and comment responses on uploaded documents to store document-related information that does not change the document content](#)
- [Associate a workflow with a document to receive specific approvals](#)
- [Search documents at the enterprise level](#)
- [Search documents at the project level](#)

3.1. Folder Management

In the Documents module, you can create folders. You can upload documents and organize them in these folders. To enforce security, you can define role-based permissions to access and use a folder. There is no limit on the number of folders that you can create in a project.

In Masterworks, during project creation, a pre-defined folder structure for the project is automatically created. A set of folders as defined for the document folder structure is automatically created in the Documents folder of the project. Additionally, you can create folders manually according to the project requirement.

You can create a predefined folder structure in a project automatically during project creation and also create additional folders manually.

The following topics aid you in managing your document folders:

- [3.1.1. Create a folder](#)
- [3.1.2. Define folder permissions](#)
- [3.1.3. Associate a document property to a folder](#)
- [3.1.4. Modify folder properties](#)
- [3.1.5. Delete a folder](#)

Folder Management Permission Matrix

This section provides information on the roles and corresponding permissions for folder management.

Role	Create Folder	Modify Folder Properties	Define Folder Permissions	Delete Folder	Associate Document Property To Document Folder
Administrator	Yes	Yes	Yes	Yes	Yes
Design Component Lead	Yes	Yes	Yes	Yes	Yes
Lead Designer	Yes	Yes	–	Yes	Yes
Highway Design Manager	Yes	Yes	–	Yes	Yes
Project Manager	Yes	Yes	–	Yes	Yes
A/E Lead Designer	Yes	Yes	–	Yes	Yes

Role	Create Folder	Modify Folder Properties	Define Folder Permissions	Delete Folder	Associate Document Property To Document Folder
A/E Manager	Yes	Yes	–	Yes	Yes
Acquisitions	Yes	Yes	–	Yes	Yes
Construction Component Lead	Yes	Yes	Yes	Yes	Yes
Construction Admin Staff	Yes	Yes	–	Yes	Yes
Construction Engineer	Yes	Yes	–	Yes	Yes
Highway Construction Manager/QAQC	Yes	Yes	–	Yes	Yes
Construction Operations Engineer	Yes	Yes	–	Yes	Yes
Project Engineer	Yes	Yes	–	Yes	Yes
Regional Engineer	Yes	Yes	–	Yes	Yes
Assistant Project Engineer A&E	Yes	Yes	–	Yes	Yes
Project Engineer A&E	Yes	Yes	–	Yes	Yes

3.1.1. Creating a Folder

Prerequisites

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

- Administrator
- Design Component Lead
- Lead Designer
- Highway Design Manager
- Project Manager
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer

- Highway Construction Manager/QAQC
- Construction Operations Engineer
- Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to [Folder Management Permission Matrix](#).

Overview

You can organize project and contract documents into folders created in the document management system.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

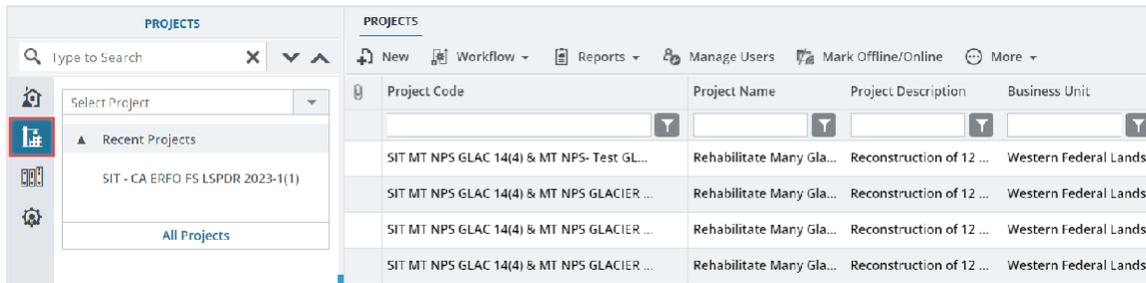


Figure 1: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

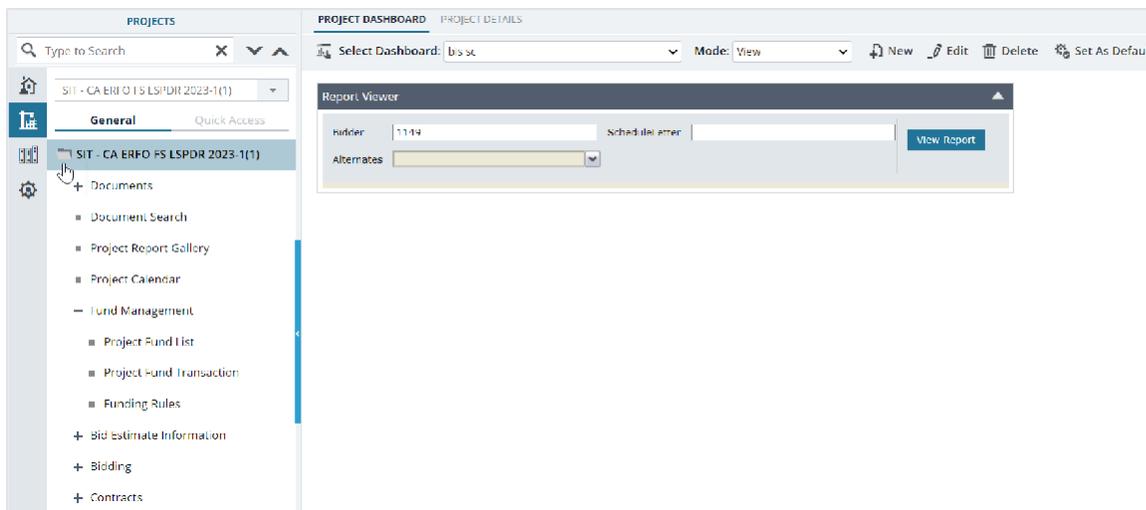


Figure 2: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

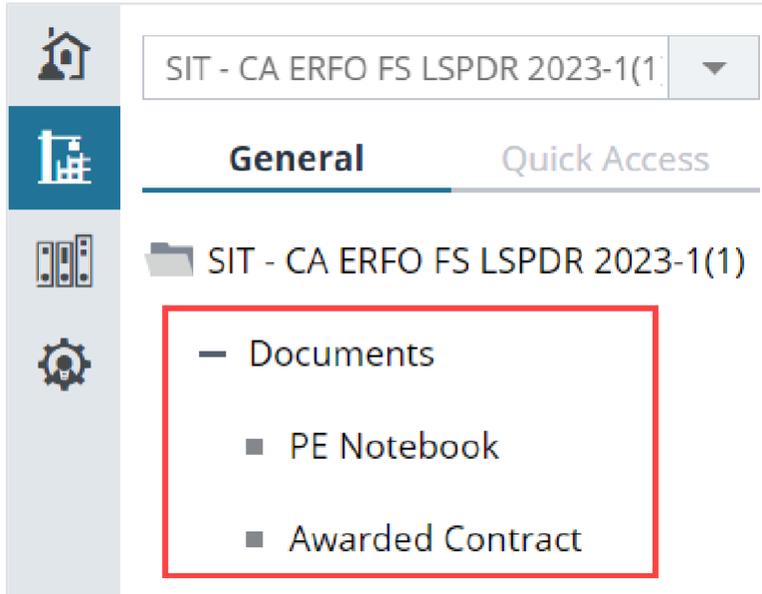


Figure 3: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

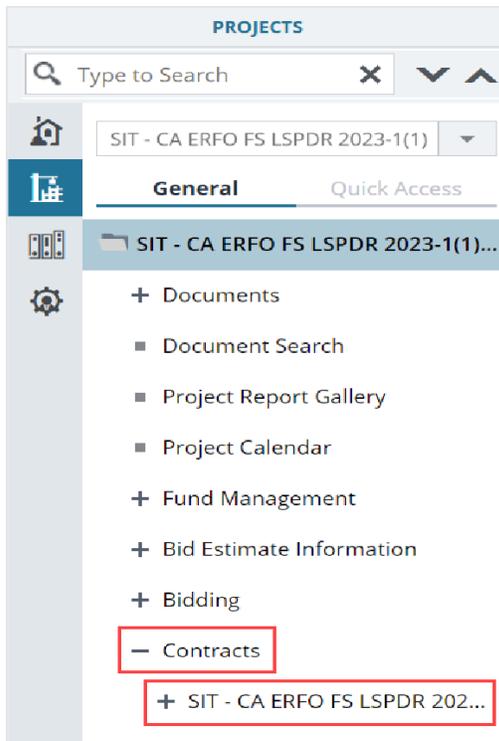


Figure 4: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

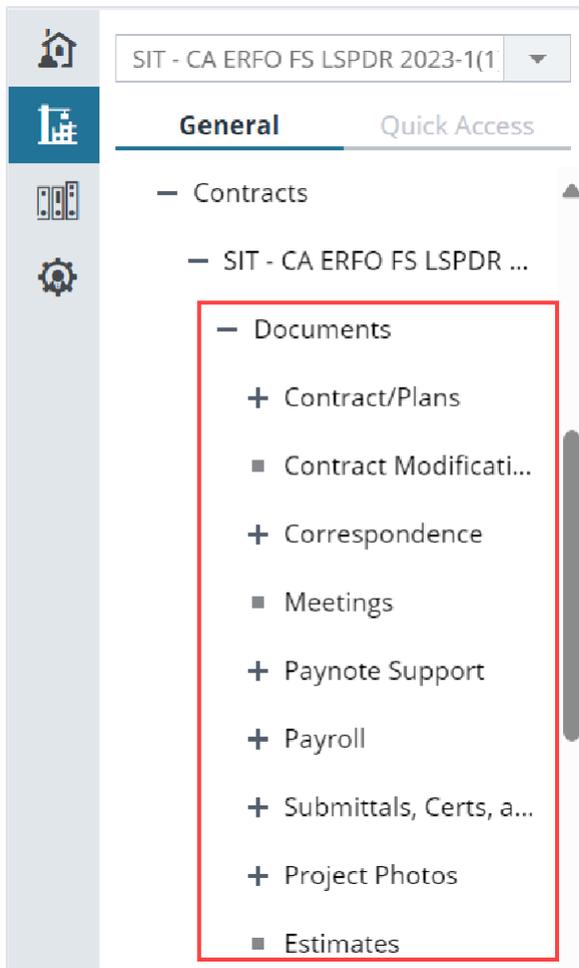


Figure 5: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

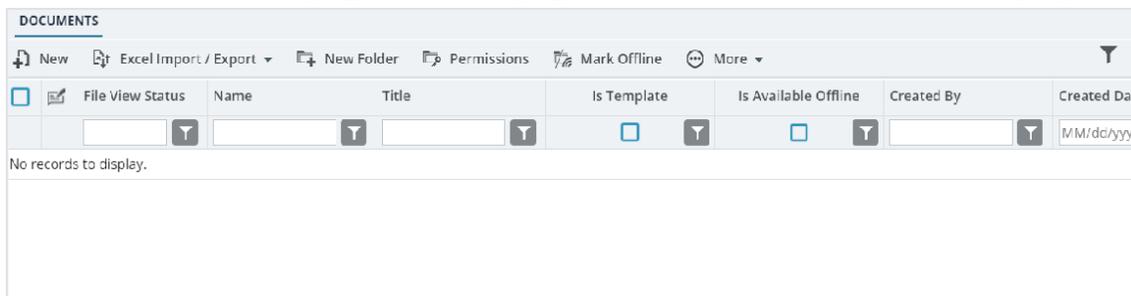


Figure 6: Documents List Page

2. Click **New Folder**  **New Folder** .

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

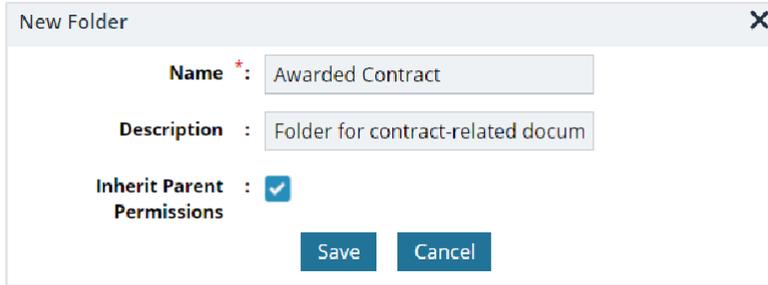


Figure 7: New Folder

3. In the **Name** field, enter the folder name.
4. In the **Description** field, enter a brief description of the folder.
5. Ensure the **Inherit Parent Permissions** check box is selected to provide the same permissions to the folder as its parent folder.

Optionally, clear the check box to provide permissions to the folder as defined for the roles of the current user.

Note: Permissions are inherited only for the roles for which the user is invited in the project or contract.

6. Click **Save**.
The folder is created in the selected folder.

3.1.2. Defining Folder Permissions

Prerequisites

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

- Administrator
- Design Component Lead
- Construction Component Lead

For more information on role-specific permissions, refer to [Folder Management Permission Matrix](#).

Overview

You can control user access to folders in the **Documents** module by configuring permissions to the various roles defined in the project. Controlling accessibility of folders in the document management system ensures a high level of security for the documents in the folder.

Steps

1. To access Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.
The **PROJECTS** list page is displayed.

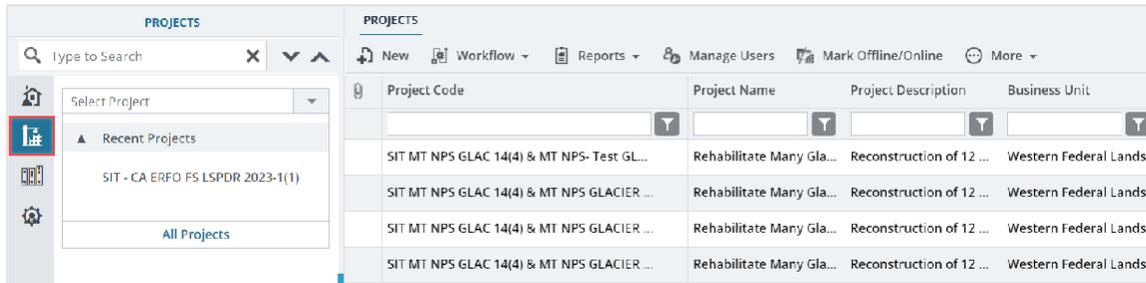


Figure 8: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

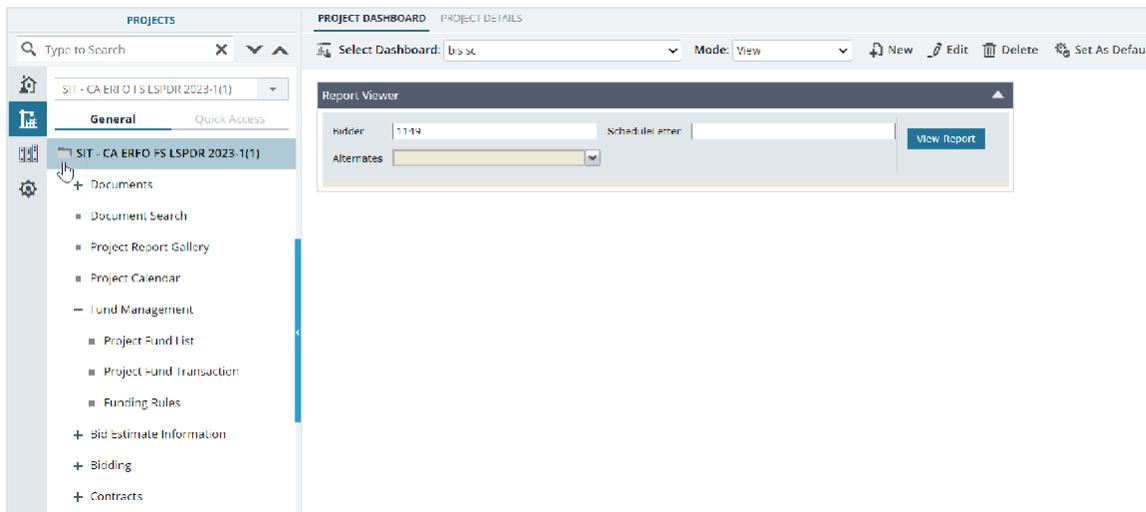


Figure 9: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

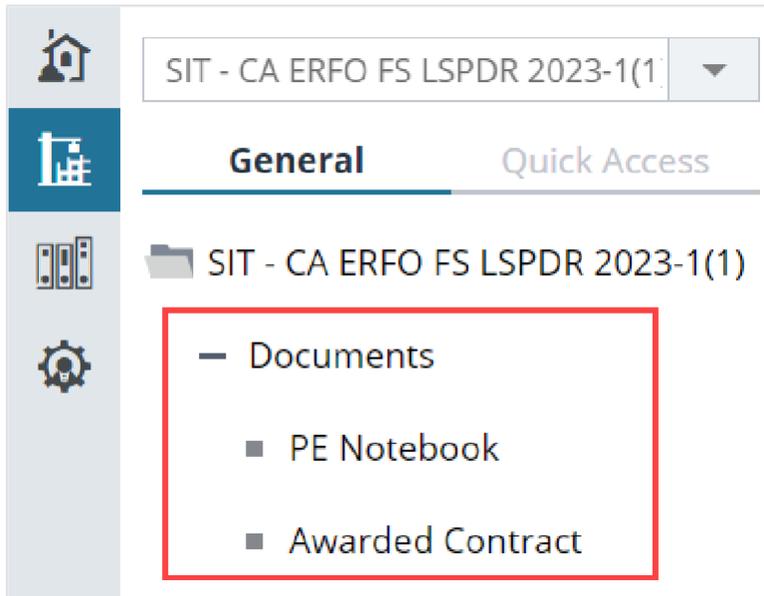


Figure 10: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

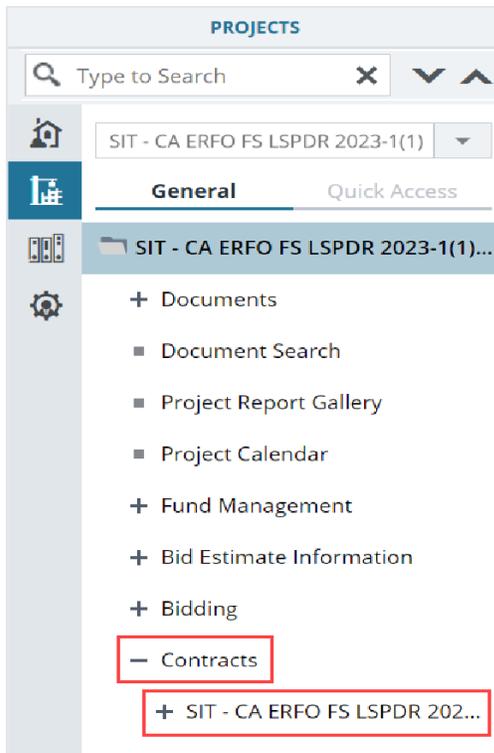


Figure 11: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

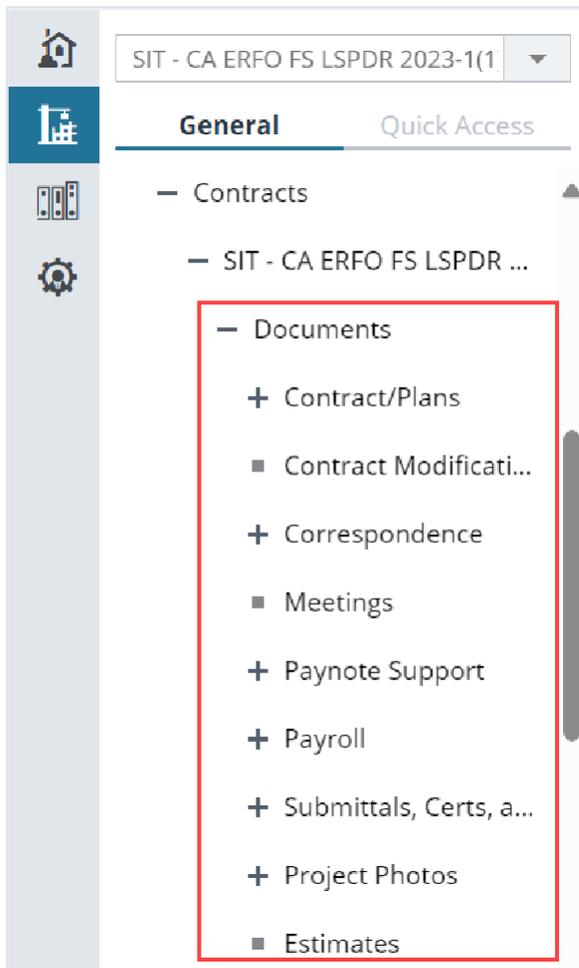


Figure 12: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

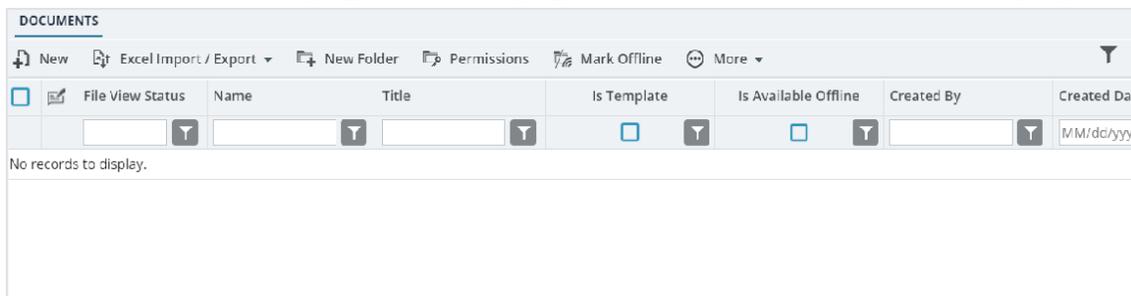


Figure 13: Documents List Page

2. In the toolbar, click **Permissions** .

The **DOCUMENT PERMISSIONS** page is displayed.

Roles	Create	Edit	View	Delete	Others
X	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/> Designer	<input type="checkbox"/> Create	<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Asso... <input type="checkbox"/> Creat... <input type="checkbox"/> Edit F... ⋮
<input type="checkbox"/> Construction Admin Staff	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Asso... <input checked="" type="checkbox"/> Creat... <input checked="" type="checkbox"/> Edit F... ⋮
<input type="checkbox"/> Project Viewer	<input type="checkbox"/> Create	<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Asso... <input type="checkbox"/> Creat... <input type="checkbox"/> Edit F... ⋮
<input checked="" type="checkbox"/> Design Component Lead	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Asso... <input checked="" type="checkbox"/> Creat... <input checked="" type="checkbox"/> Edit F... ⋮
<input checked="" type="checkbox"/> Construction Component Lead	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input checked="" type="checkbox"/> Asso... <input checked="" type="checkbox"/> Creat... <input checked="" type="checkbox"/> Edit F... ⋮
<input type="checkbox"/> Construction Contractor CD/Is only	<input checked="" type="checkbox"/> Create	<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Asso... <input type="checkbox"/> Creat... <input type="checkbox"/> Edit F... ⋮
<input type="checkbox"/> Construction Contractor QC Manager	<input checked="" type="checkbox"/> Create	<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Asso... <input type="checkbox"/> Creat... <input type="checkbox"/> Edit F... ⋮
<input type="checkbox"/> Construction Contractor Manager	<input checked="" type="checkbox"/> Create	<input type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Asso... <input type="checkbox"/> Creat... <input type="checkbox"/> Edit F... ⋮
<input type="checkbox"/> Assistant Project Engineer	<input checked="" type="checkbox"/> Create	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Delete	<input type="checkbox"/> Asso... <input type="checkbox"/> Creat... <input type="checkbox"/> Edit F... ⋮

Figure 14: Document Permissions

The roles available in the project are displayed as the rows of the permissions table and document management features are displayed as the columns for you to assign role- based permissions to the document folder.

3. Corresponding to each role, select the appropriate check boxes to provide access to or clear the appropriate check boxes to restrict access to the feature in the folder.
4. Click **Save**.

The permissions defined on the folder are saved and a lock symbol appears adjacent to the respective folder.

3.1.3. Associating a Document Property Template to a Folder

Prerequisites

- The role of the logged-in user must be one of the following:
 - Administrator
 - Design Component Lead
 - Lead Designer
 - Highway Design Manager
 - Project Manager
 - A/E Lead Designer
 - A/E Manager
 - Acquisitions
 - Construction Component Lead
 - Construction Admin Staff
 - Construction Engineer
 - Highway Construction Manager/QAQC

- Construction Operations Engineer
- Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E
- Documents are not uploaded to the folder.

Overview

You can associate a document property template to a folder. The associated document property template is displayed when uploading documents to the folder.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

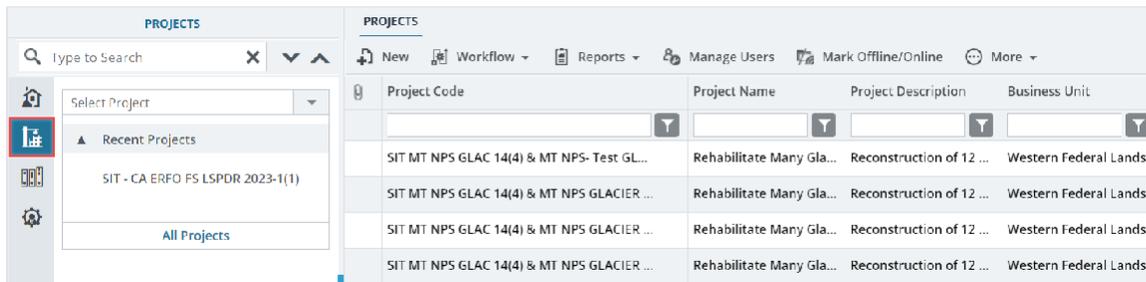


Figure 15: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

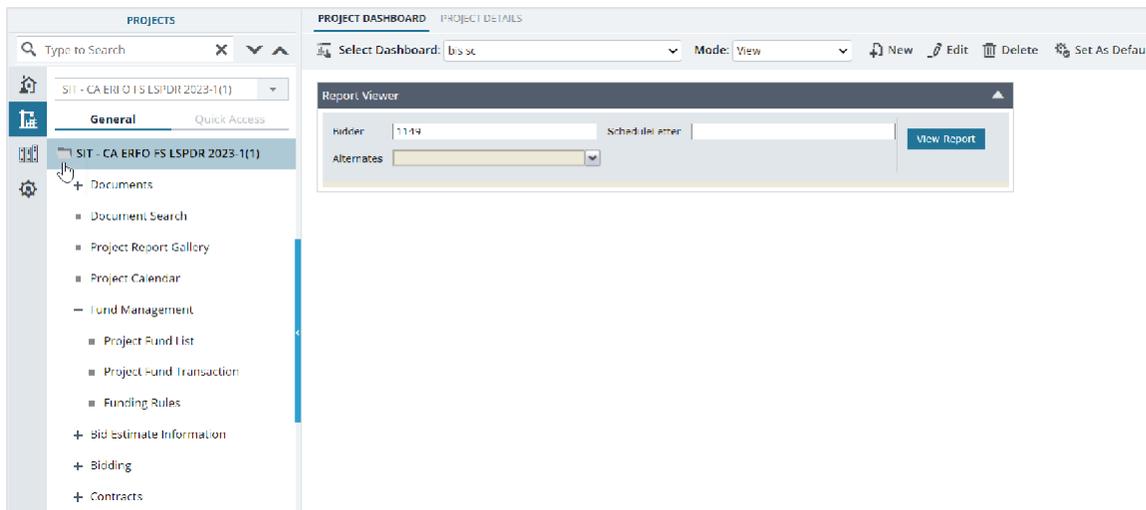


Figure 16: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

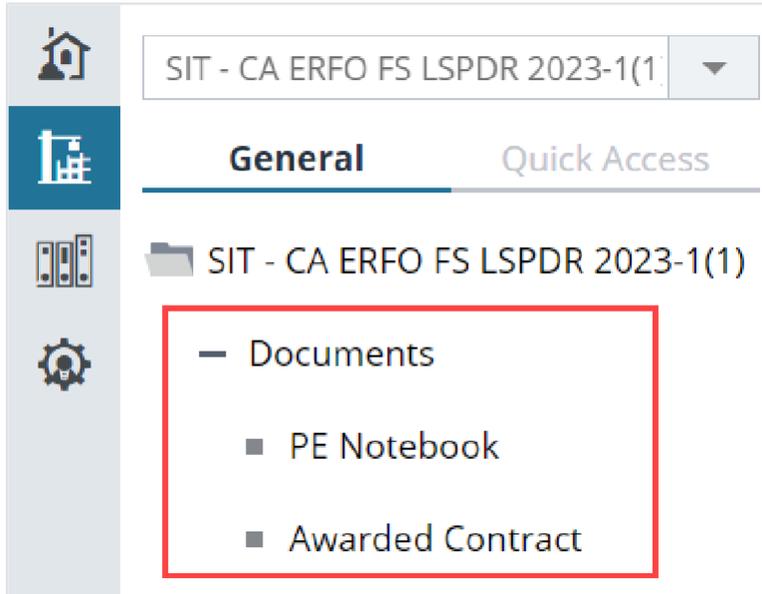


Figure 17: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

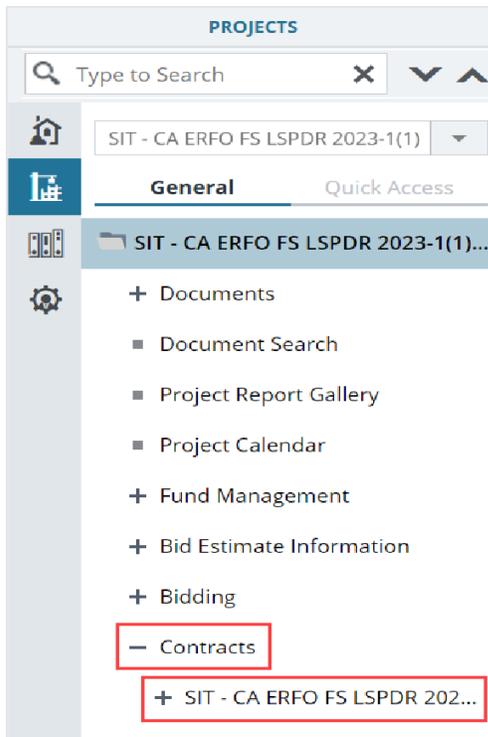


Figure 18: Expanding Contracts

- b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

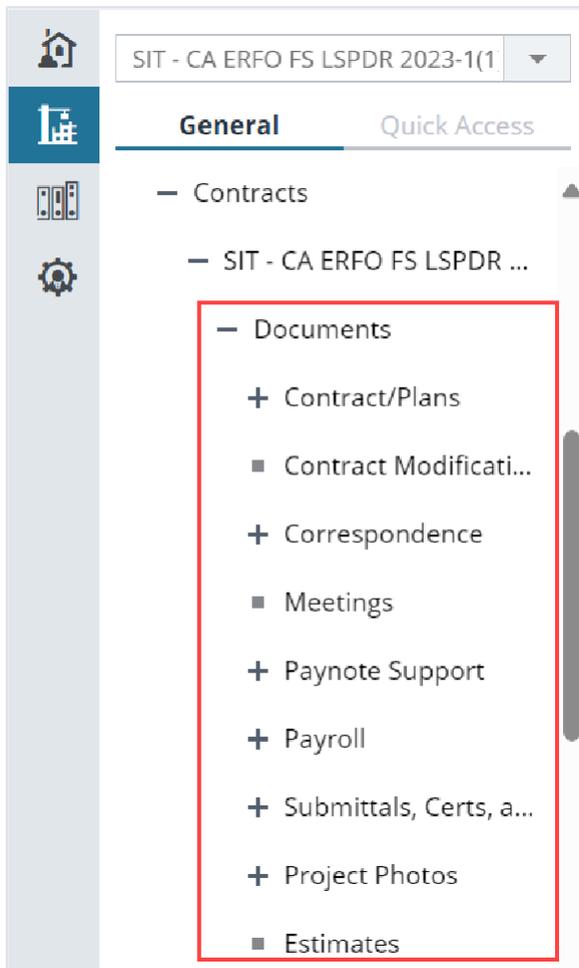


Figure 19: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

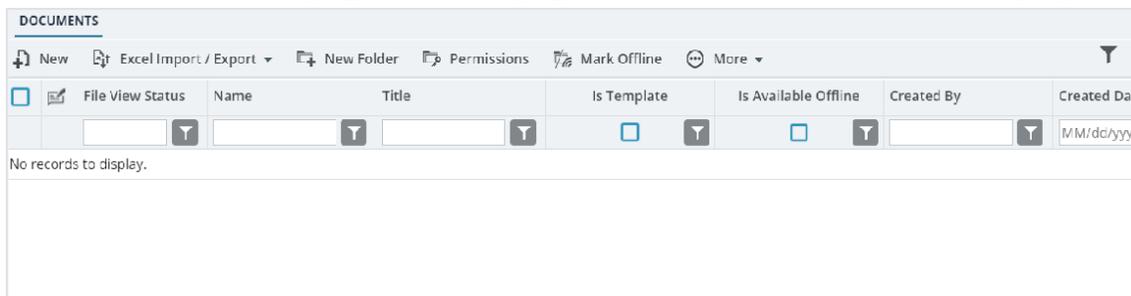


Figure 20: Documents List Page

2. In the toolbar, click **Associate Document Property**.

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



Figure 21: Associate Document Folder

3. From the **Document Property** Set drop-down list, select the appropriate document property template.
Available options are document property templates published in the **Document Properties** catalog of the library.
4. Click **Save**.

3.1.4. Modifying Folder Properties

Prerequisites

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

- Administrator
- Design Component Lead
- Lead Designer
- Highway Design Manager
- Project Manager
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QAQC
- Construction Operations Engineer
- Project Engineer
- Regional Engineer
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to [Folder Management Permission Matrix](#).

Overview

You can modify the name and the description of a folder.

Note: You cannot edit the properties of the default Documents folder.

Steps

1. To access Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.
The **PROJECTS** list page is displayed.

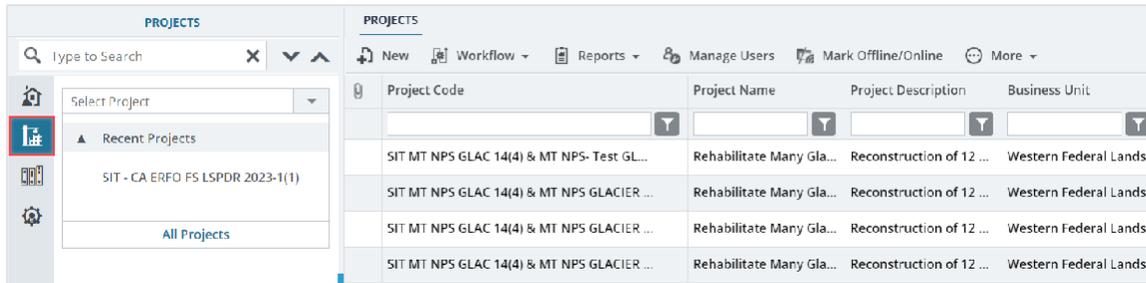


Figure 22: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

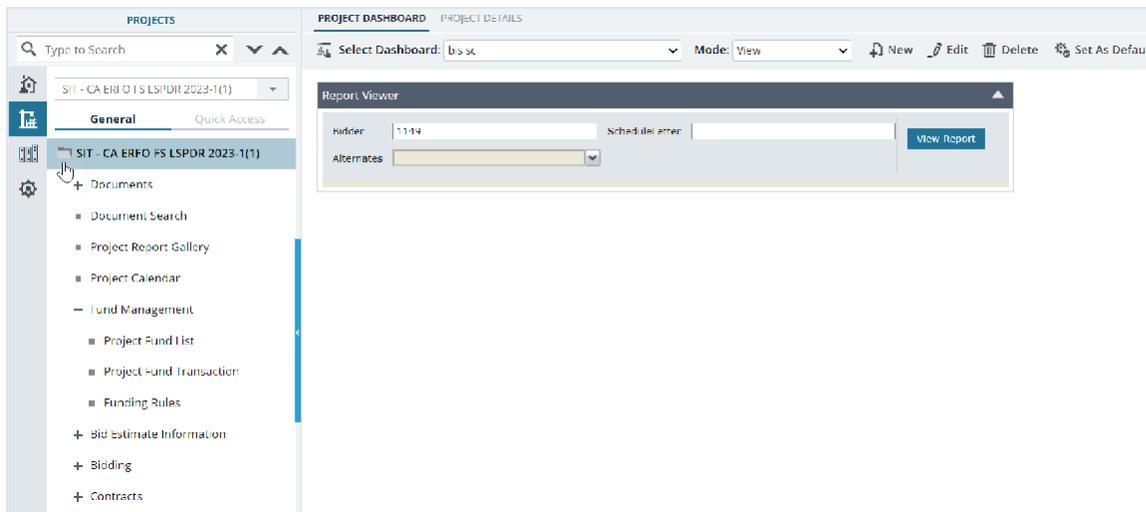


Figure 23: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

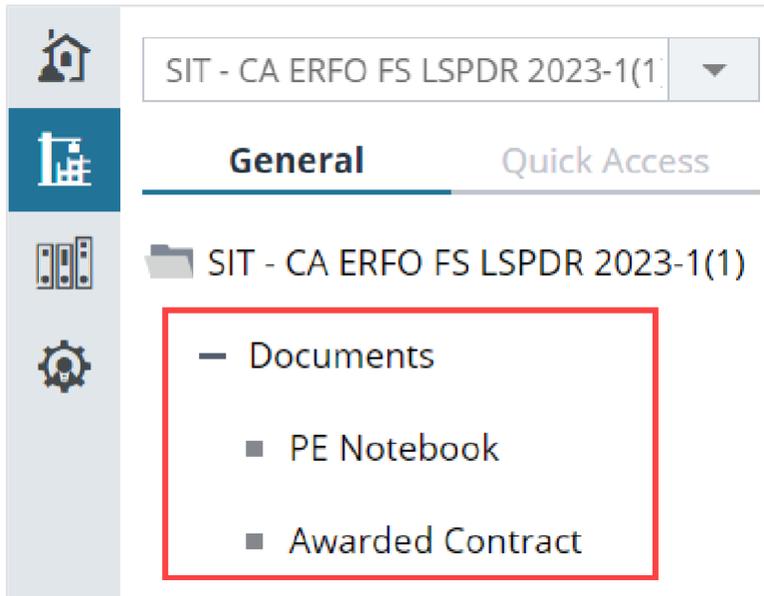


Figure 24: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

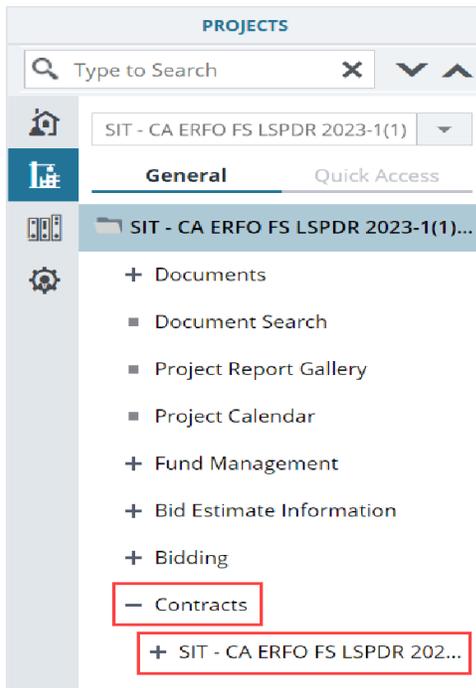


Figure 25: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

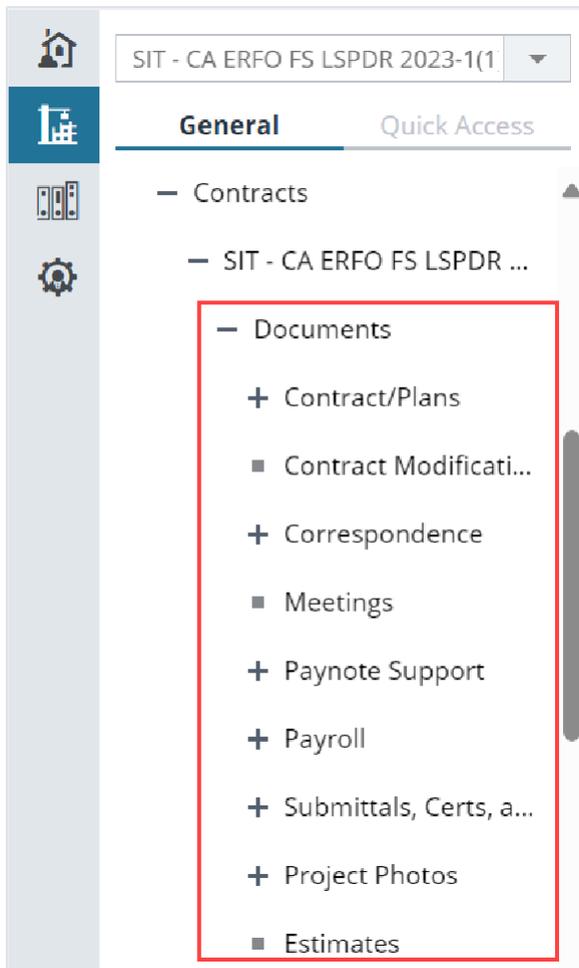


Figure 26: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

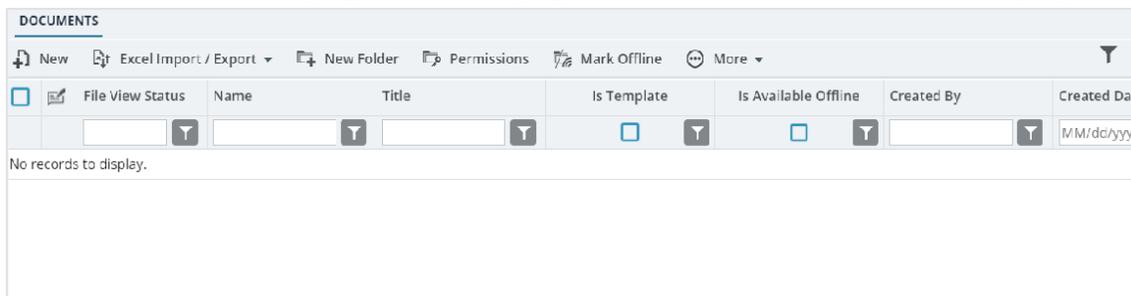
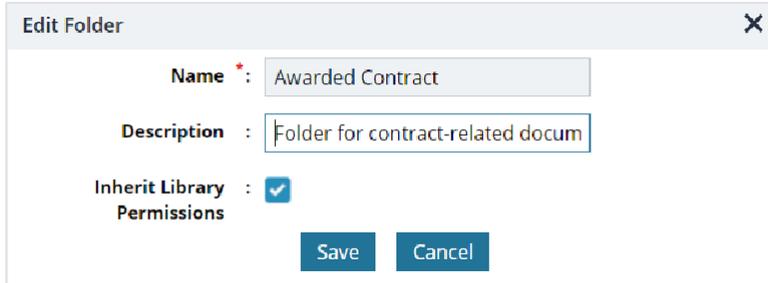


Figure 27: Documents List Page

- In the toolbar, click **Edit**  .

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



The screenshot shows the 'Edit Folder' dialog box. It has a title bar with the text 'Edit Folder' and a close button (X). Below the title bar, there are three fields: 'Name' with a red asterisk and the value 'Awarded Contract', 'Description' with the value 'Folder for contract-related docum', and 'Inherit Library Permissions' with a checked checkbox. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

Figure 28: Edit Folder

- Make the appropriate changes.
 - For folders that were created as part of the folder structure selected for the project or contract, select the **Inherit Library Permissions** check box to reset the permissions of the folder to as defined for the folder in the Document Folder Structure catalog of the library.
 - For folders that were manually created, select the **Inherit Parent Permissions** check box to reset the permissions of the folder to as defined for its parent folder.

Note: The **Inherit Parent Permissions** check box is available only if you have **Create** permissions on the parent folder.

- Click **Save**.

3.1.5. Deleting a Folder

Prerequisites

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

- Administrator
- Design Component Lead
- Lead Designer
- Highway Design Manager
- Project Manager
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QAQC
- Construction Operations Engineer

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

For more information on role-specific permissions, refer to [Folder Management Permission Matrix](#).

Overview

You can delete a user-created folder. All sub-folders and its contents within that folder will be deleted from the system.

Note: You cannot delete the default Documents folder.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

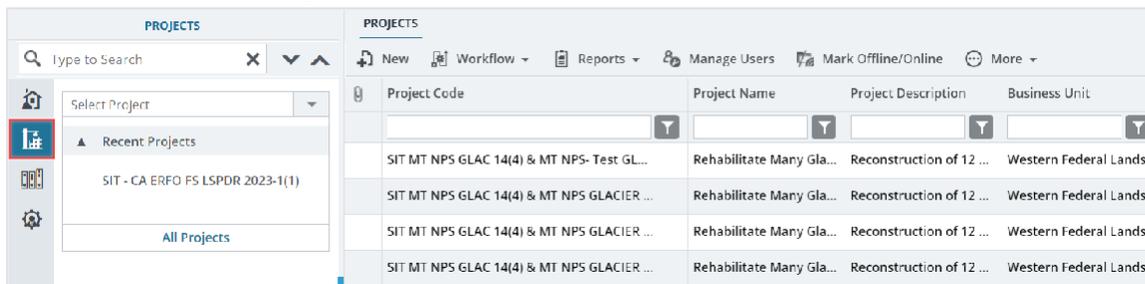


Figure 29: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

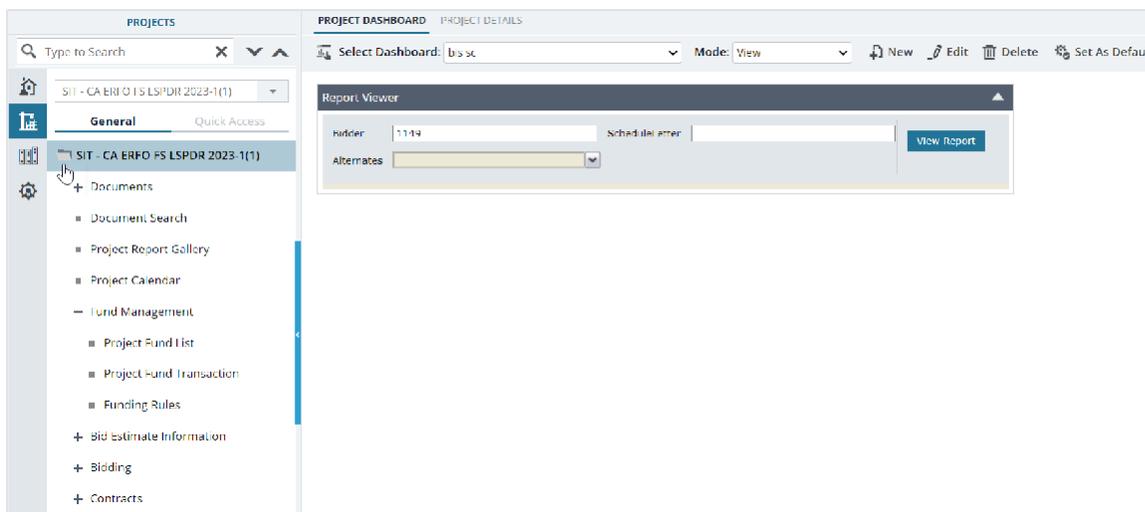


Figure 30: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

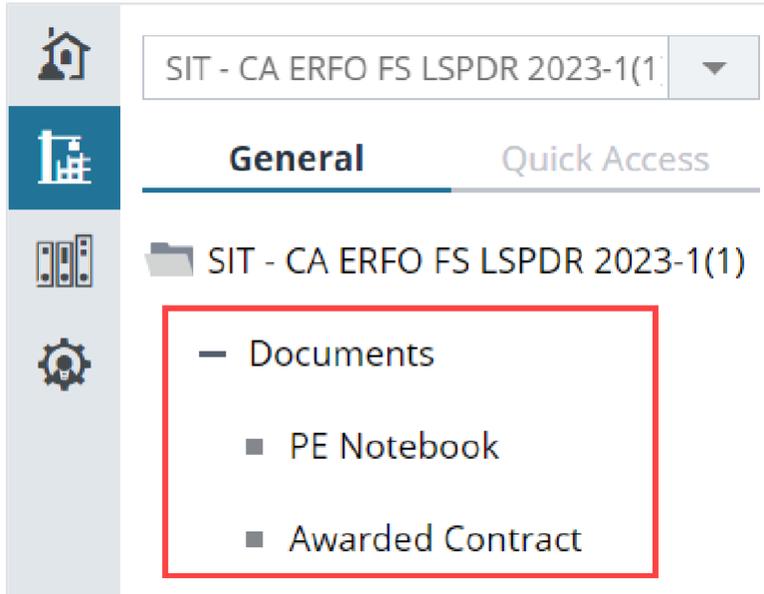


Figure 31: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

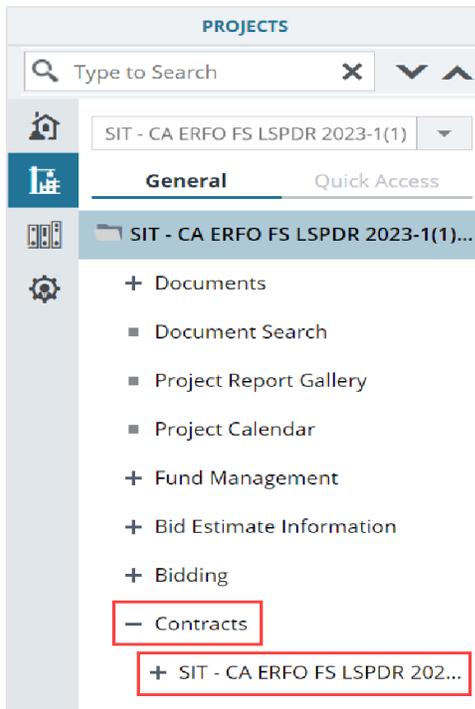


Figure 32: Expanding Contracts

- b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

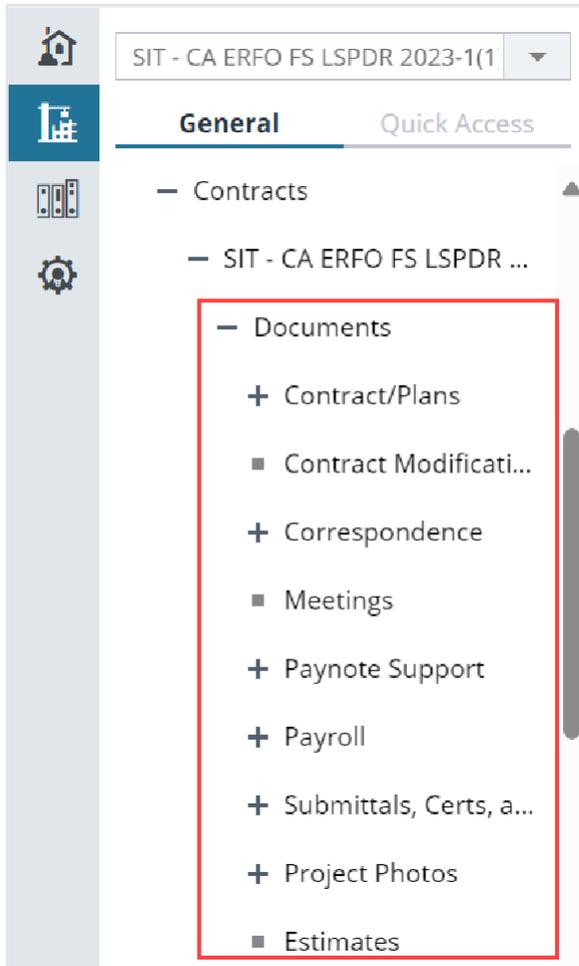


Figure 33: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

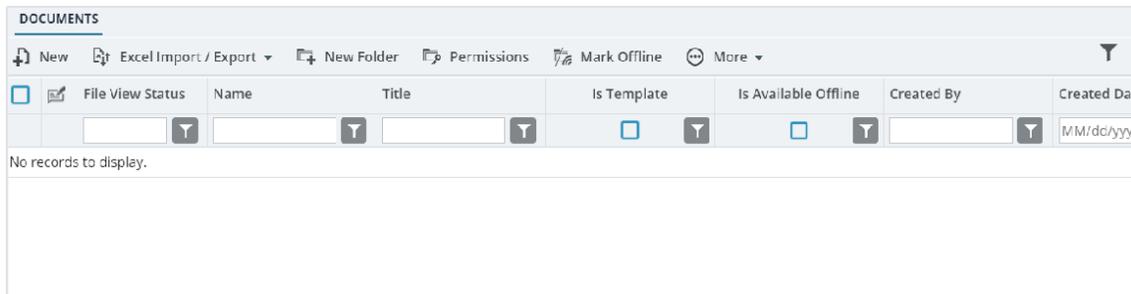


Figure 34: Documents List Page

2. Click **Delete**  .
A confirmation message is displayed.
3. Click **OK**.
The selected folder and all its contents are deleted.

3.2. Document Management

The Masterworks **Documents** module supports the following document management features:

- [3.2.1. Access project and contract documents](#)
- [3.2.2. View documents](#)
- [3.2.3. Upload documents](#)
- [3.2.3.1. Upload multiple documents in bulk](#)
- [3.2.4. Download documents](#)
- [3.2.5. Update documents](#)
- [3.2.6. Annotate documents](#)
- [3.2.7. Move documents to a different folder](#)
- [3.2.8. Archive documents](#)
- [3.2.9. Edit document properties](#)
- [3.2.10. Log comments regarding the document](#)

Document Management Permission Matrix

This section provides information on the roles and corresponding permissions for the respective forms in document management.

Role	Create, Edit, Delete	Check In/Out	View Files	Download	Archive	Version History	Move
Administrator	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Project Viewer	–	–	Yes	–	–	–	–
Design Component Lead	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Designer	–	–	Yes	Yes	–	Yes	–
Lead Designer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Design QA/QC	–	–	Yes	Yes	–	Yes	–
Highway Design Manager	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Project Manager	Yes	Yes	Yes	Yes	Yes	Yes	Yes
A/E Designer	–	–	Yes	Yes	–	Yes	–
A/E Lead Designer	Yes	Yes	Yes	Yes	–	Yes	Yes
A/E Manager	Yes	Yes	Yes	Yes	–	Yes	Yes
Acquisitions	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Construction Component Lead	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Construction Admin Staff	Yes	Yes	Yes	Yes	Yes	Yes	Yes

Role	Create, Edit, Delete	Check In/Out	View Files	Download	Archive	Version History	Move
Construction Engineer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Highway Construction Manager/QAQC	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Construction Operations Engineer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Construction Contractor CDRs	Yes (Can only Create)	-	Yes	Yes	-	-	-
Construction Contractor Basic	Yes	-	Yes	Yes	-	-	-
Construction Contractor QC Manager	Yes	-	Yes	Yes	-	-	-
Construction Contractor Manager	Yes	-	Yes	Yes	-	-	-
Inspector	-	-	Yes	Yes	-	-	-
Assistant Project Engineer	-	-	Yes	Yes	-	-	-
Project Engineer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Regional Engineer	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Construction Inspection A&E Manager	-	-	Yes	Yes	-	-	-
Inspector A&E	-	-	Yes	Yes	-	-	-
Assistant Project Engineer A&E	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Project Engineer A&E	Yes	Yes	Yes	Yes	Yes	Yes	Yes

3.2.1. Accessing Project and Contract Documents

Overview

The **Documents** folder is the base for the document management system in Masterworks. All project-related and contract-related documents are organized in folders that are created in the Documents folder.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

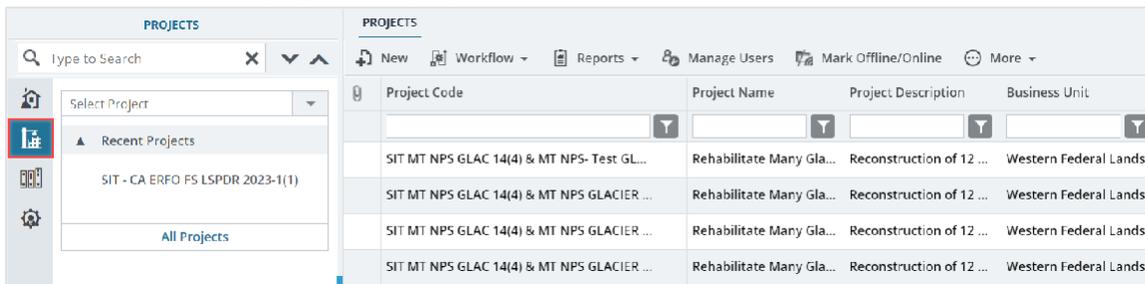


Figure 35: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

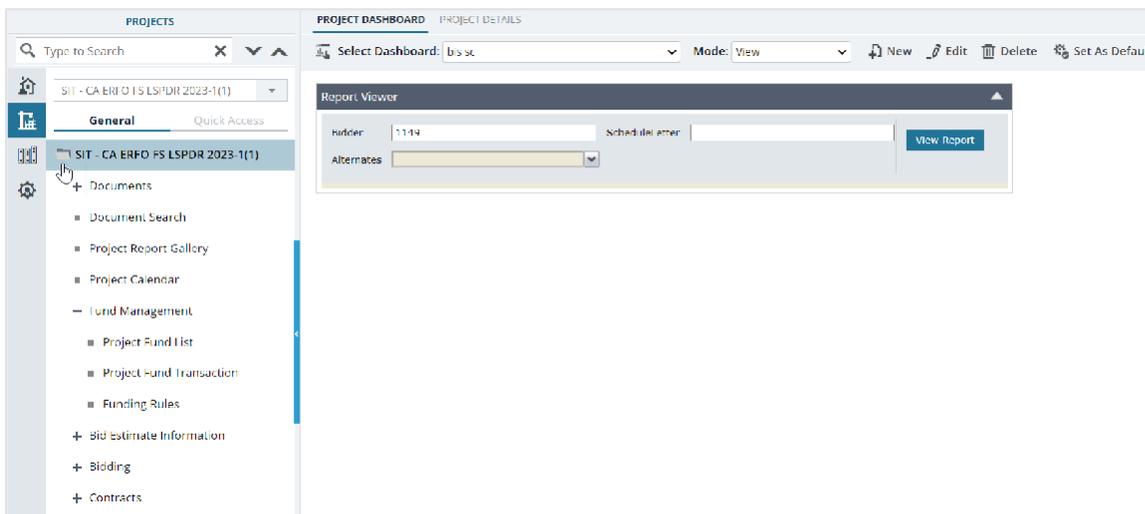


Figure 36: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

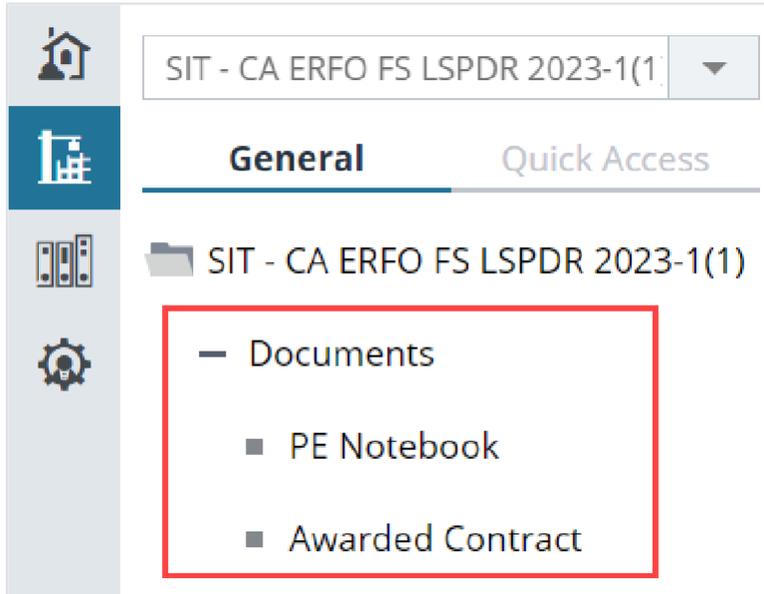


Figure 37: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

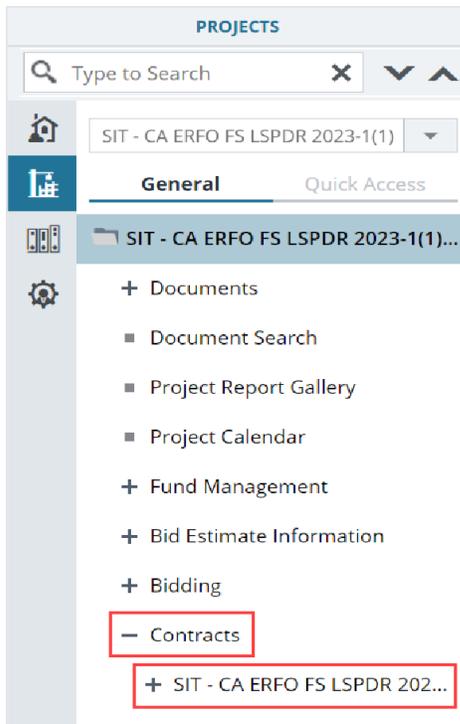


Figure 38: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

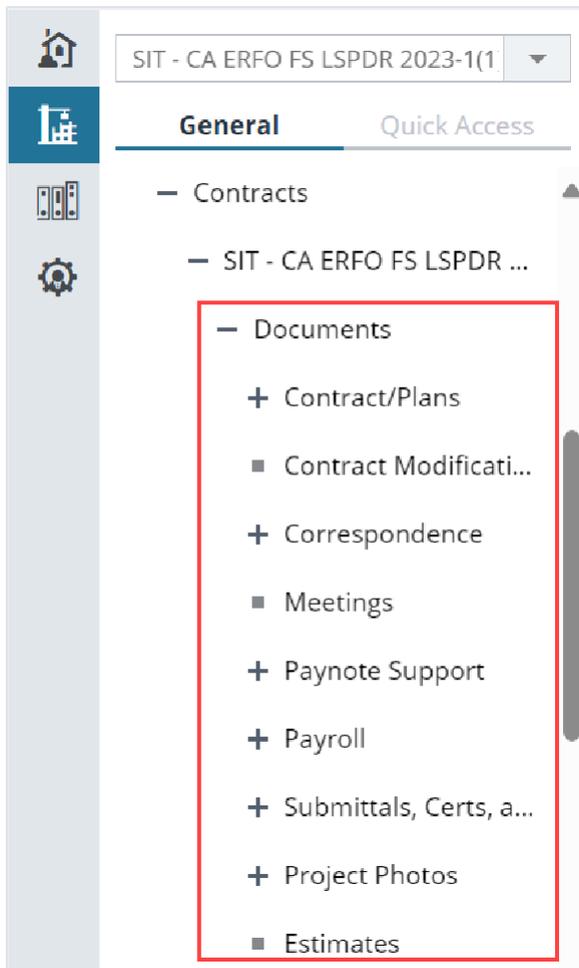


Figure 39: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

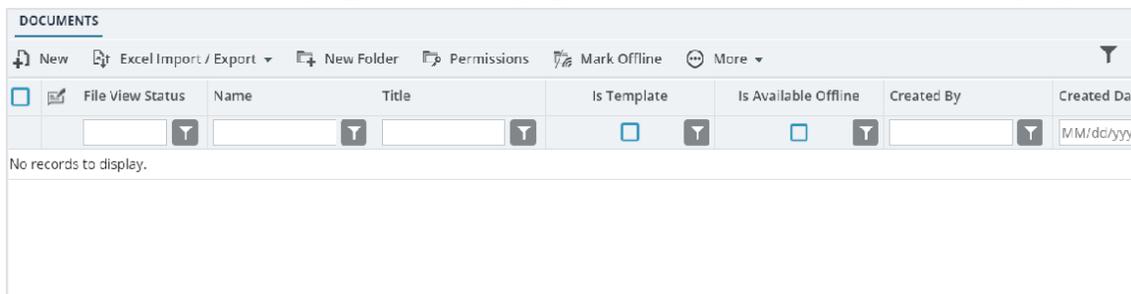


Figure 40: Documents List Page

3.2.2. Viewing Files

You can view various formats of documents in the application without installing additional document viewer applications on your system.

You can also view reduced-size images of pictures and view a slideshow presentation of pictures in a folder using the Thumbnail and the Slide Show utilities.

Note: You can view the document only when the status of the document in the **File View Status** column is **Ready**.

3.2.2.1. Viewing a Document in the Viewer

Prerequisites

You must have the appropriate permission to view a document.

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#)

Steps

1. In the navigation pane, expand **Documents**, and then click the appropriate document folder.
2. In the documents list page, select the appropriate document, and then click **View**.

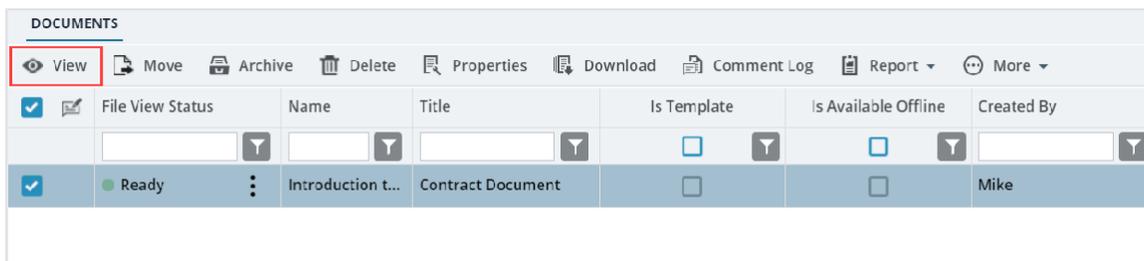


Figure 41: View Option

Alternatively, double-click the appropriate document in the list.

The document is opened on the **VIEWER** page.

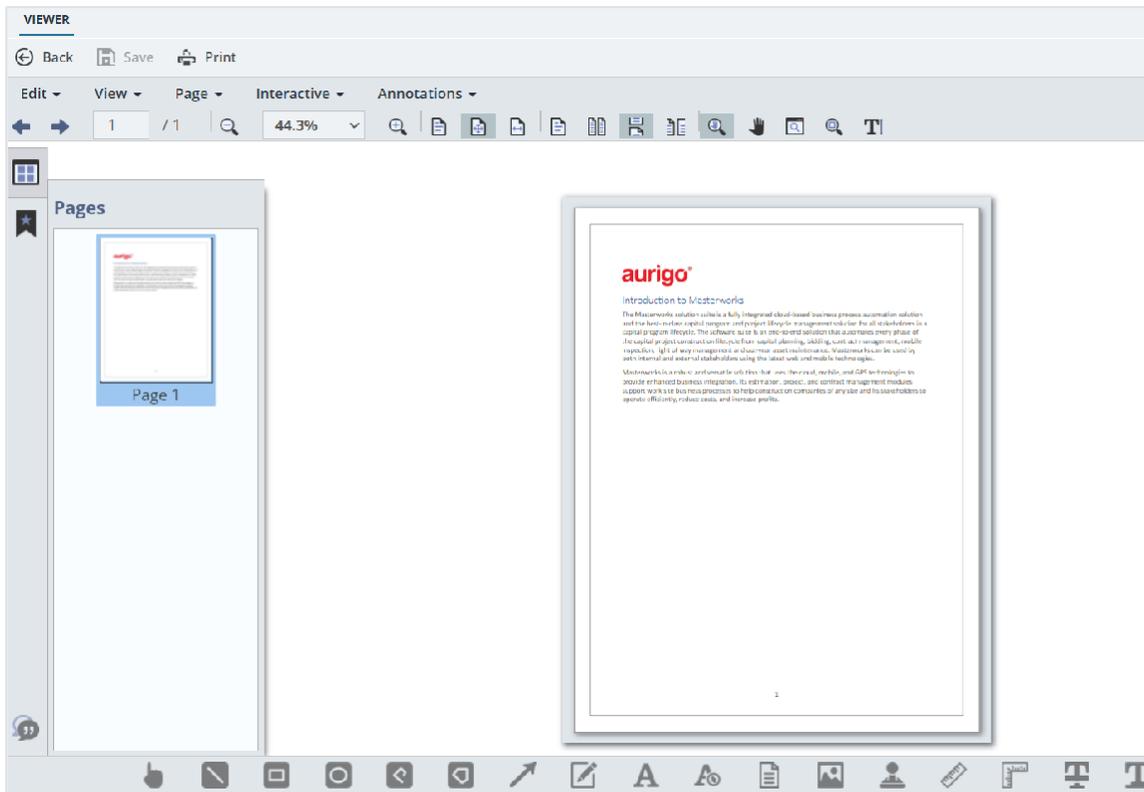


Figure 42: Viewer Page

3.2.2.2. Viewing Slideshow and Thumbnails of Images

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

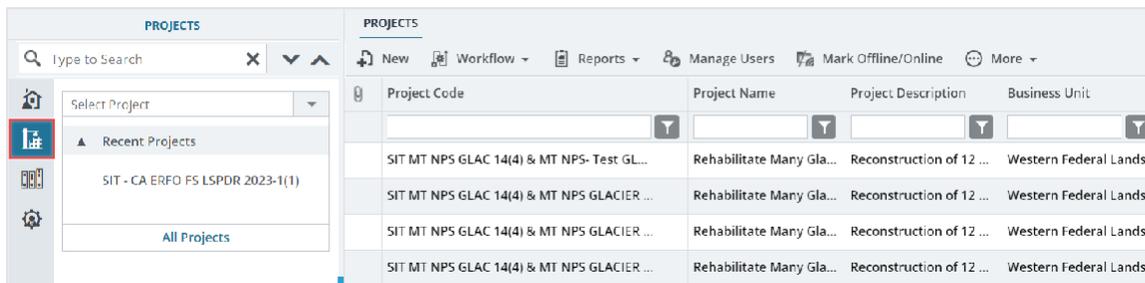


Figure 43: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

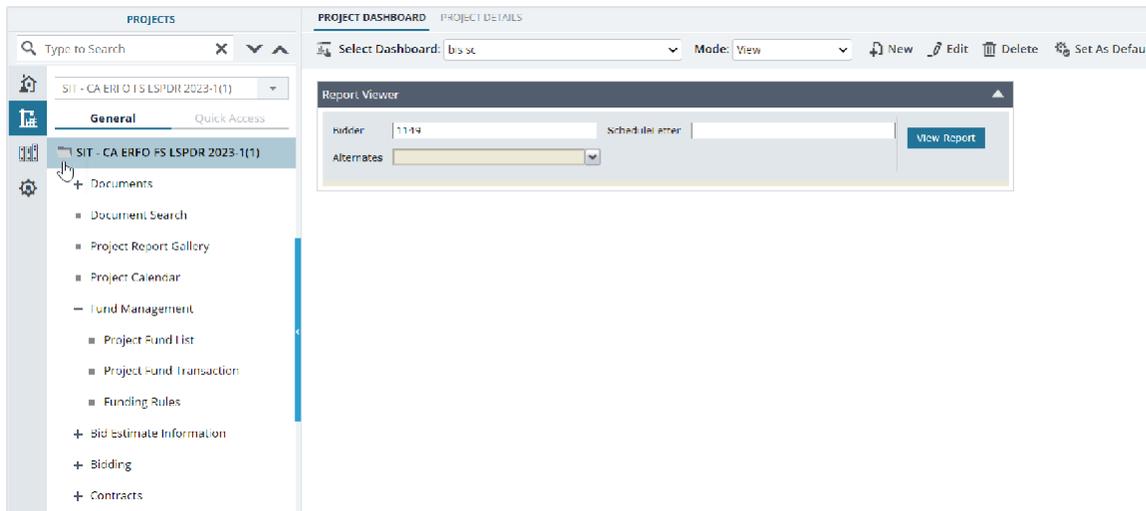


Figure 44: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

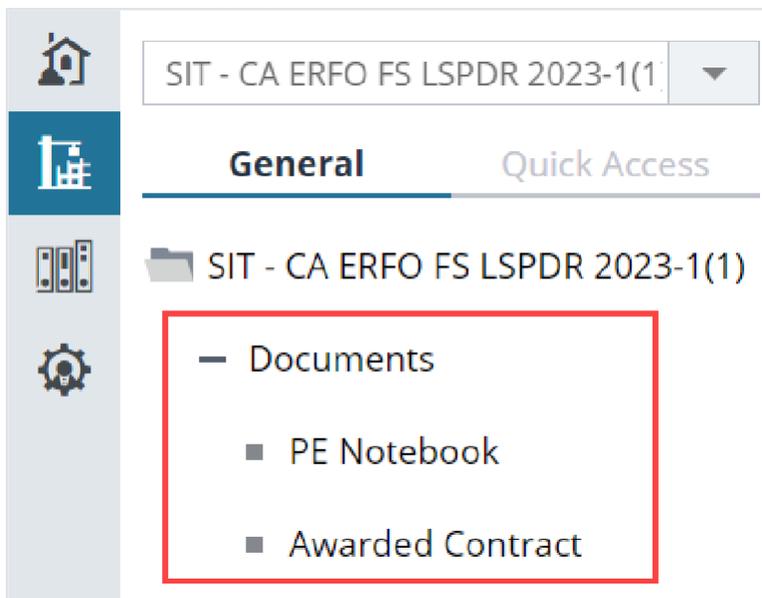


Figure 45: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

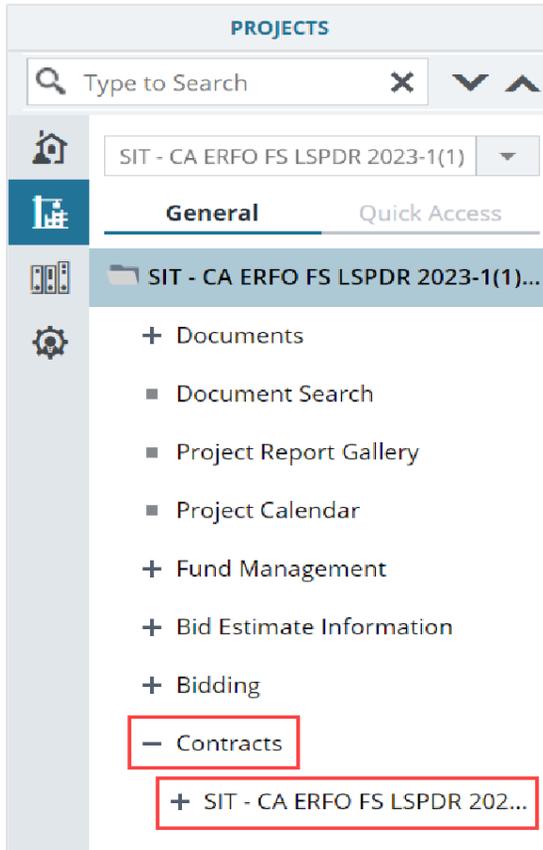


Figure 46: Expanding Contracts

- b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

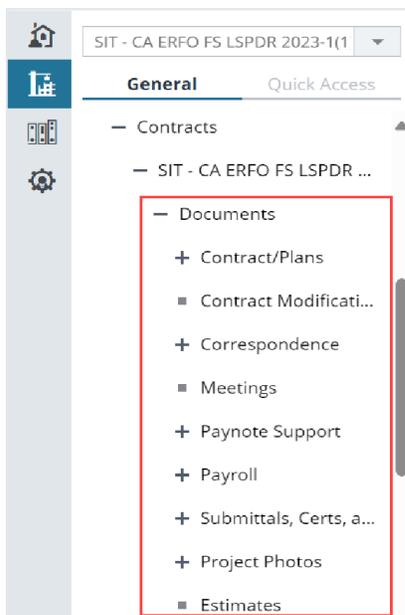


Figure 47: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

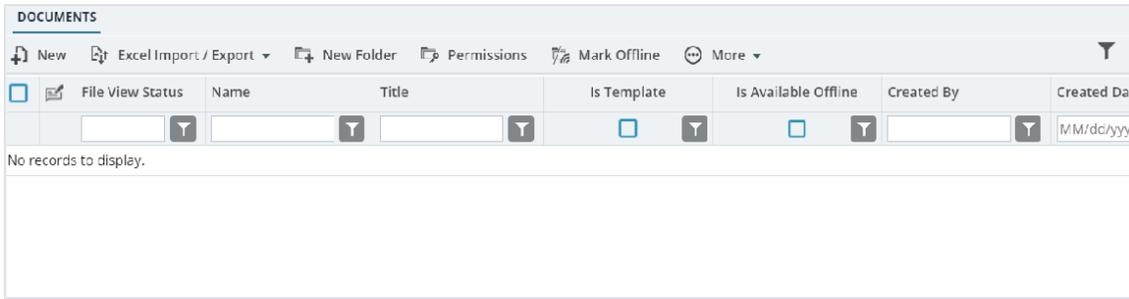
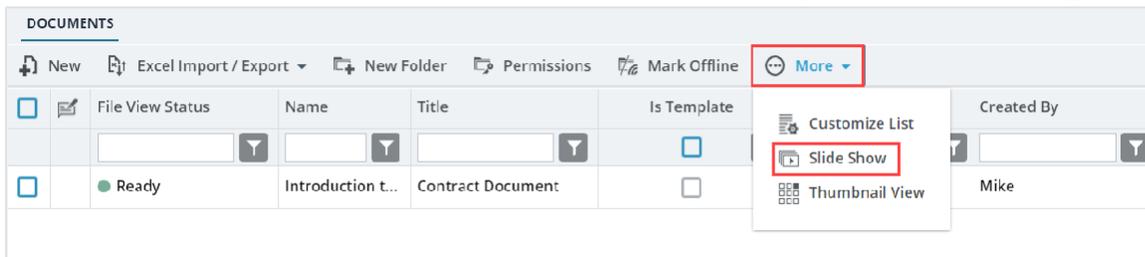


Figure 48: Documents List Page

2. To view the slide show:
 - a. Click **More**, and then click **Slide Show** to view a slide show presentation of images in that folder.



- b. Click the image to view the navigation pane at the bottom of the page. Click to view the list page of the document folder. Or, click or to view the next image or the previous image.

3. To view thumbnails:
 - a. Click **More**, and then click **Thumbnail View** to view reduced size images of pictures in the selected folder.

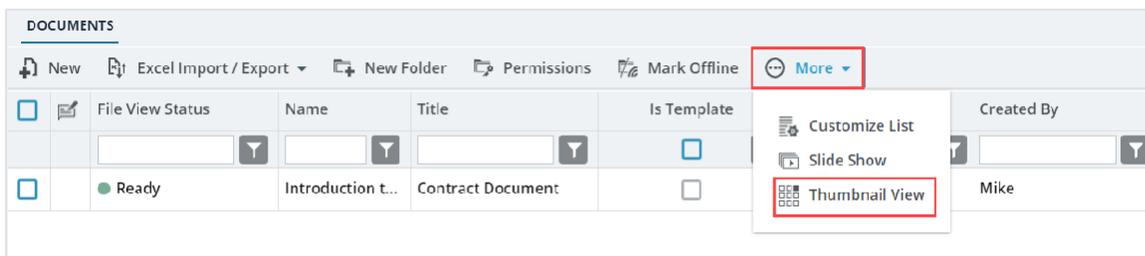


Figure 49: Thumb Nail View Option

- b. Click **List View** to exit the thumbnail view and view the document list page.

3.2.3. Uploading Documents

Prerequisites

- The role of the logged-in user must be one of the following:
 - Administrator
 - Design Component Lead
 - Lead Designer
 - Highway Design Manager
 - Project Manager
 - A/E Lead Designer
 - A/E Manager
 - Acquisitions
 - Construction Component Lead
 - Construction Admin Staff
 - Construction Engineer
 - Highway Construction Manager/QAQC
 - Construction Operations Engineer
 - Construction Contractor CDRs
 - Construction Contractor Basic
 - Construction Contractor QC Manager
 - Construction Contractor Manager
 - Project Engineer
 - Regional Engineer
 - Assistant Project Engineer A&E
 - Project Engineer A&E

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).

- The document file type is an allowed file type as configured in the application. For information on allowed file types, refer to **Application Settings** section in **Administrator Guide**.
- A document of the same name does not exist in the folder.

Overview

In the Documents module, you can upload various file types as configured in the application. You can upload documents of any file types such as Microsoft files, PDFs, images, audios, videos, and other file types.

You can also upload 2-Dimensional (2D), 3-Dimensional (3D), and other format drawing files that are created using AutoCAD and other designing software.

While viewing a document, based on the file type, Masterworks enables various functionalities.

Additionally, you can perform the following actions:

- Add metadata information to documents uploaded to the application
- Associate a workflow with a document to obtain approvals from stakeholders

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:

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

The **PROJECTS** list page is displayed.

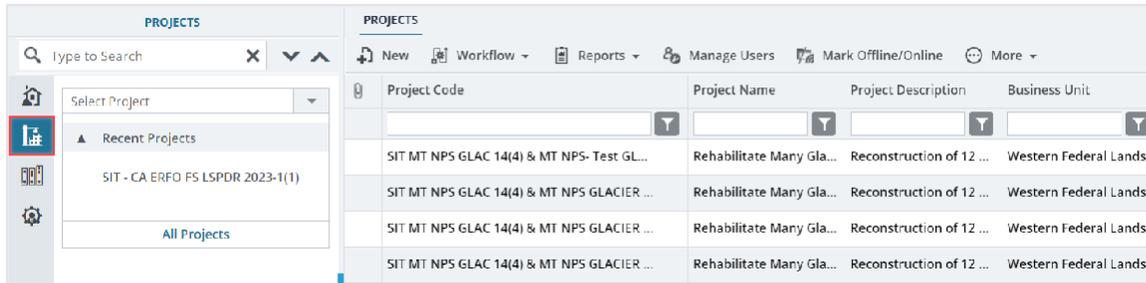


Figure 50: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

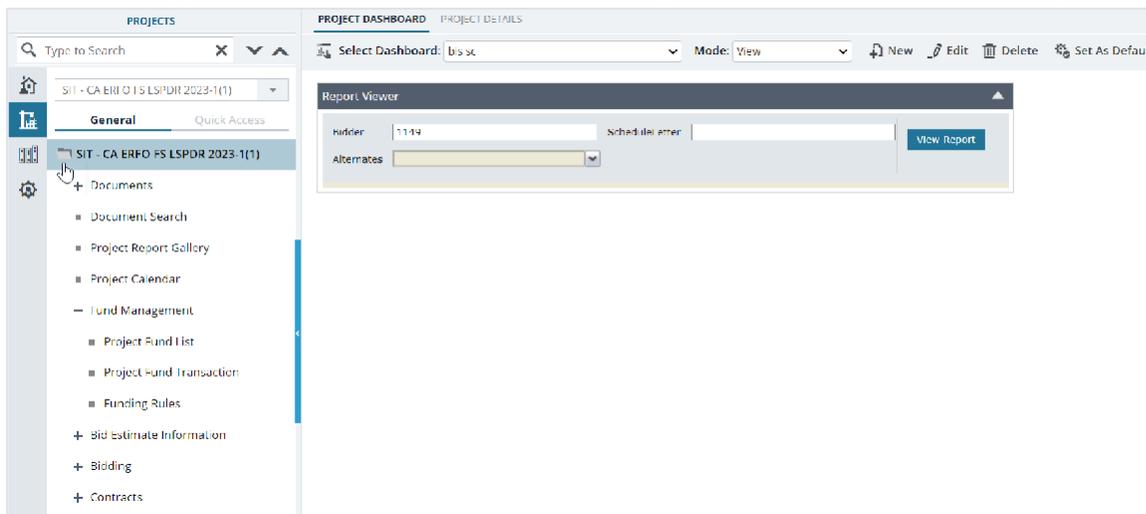


Figure 51: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

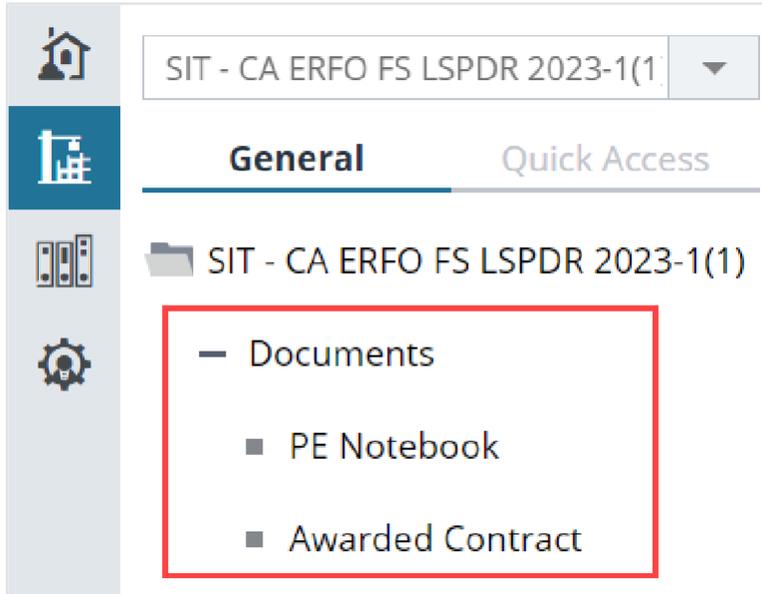


Figure 52: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

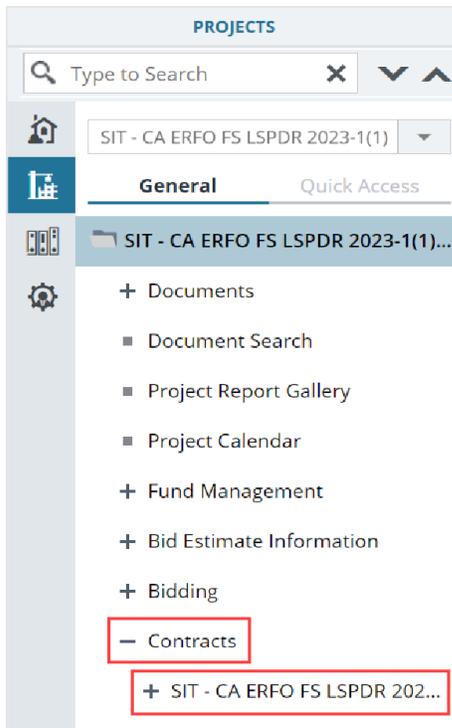


Figure 53: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

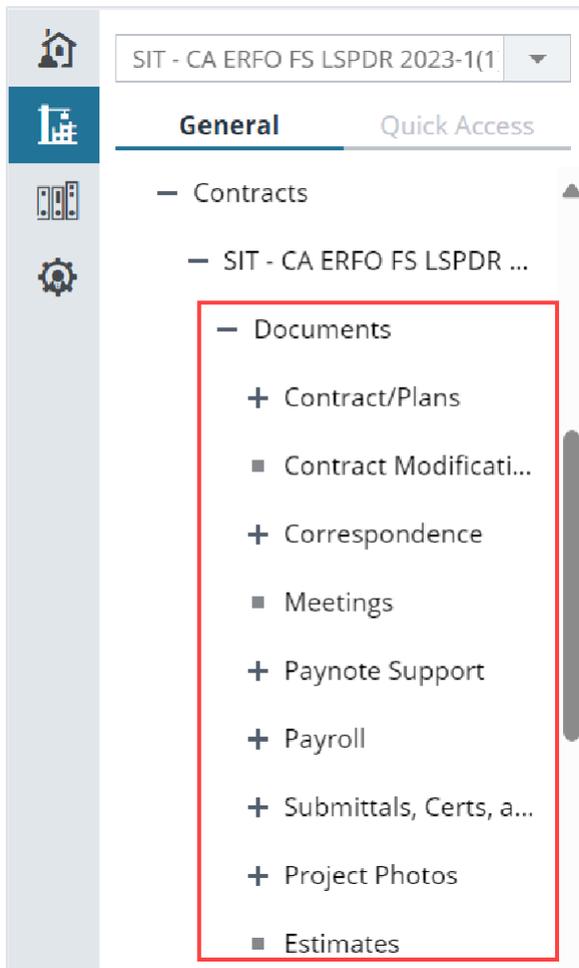


Figure 54: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

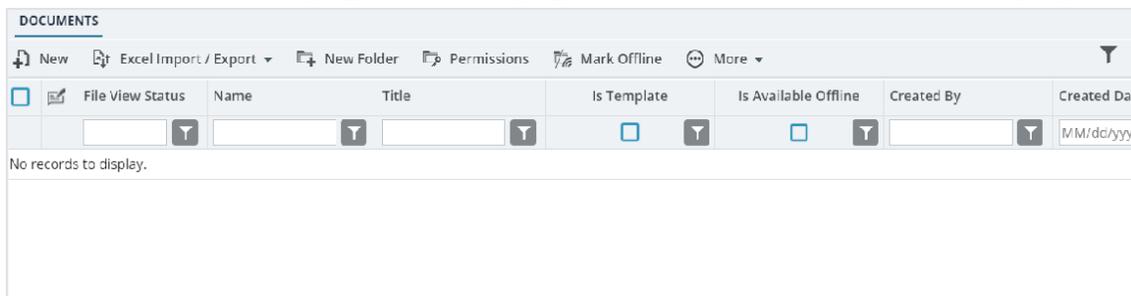


Figure 55: Documents List Page

2. Click **New**.

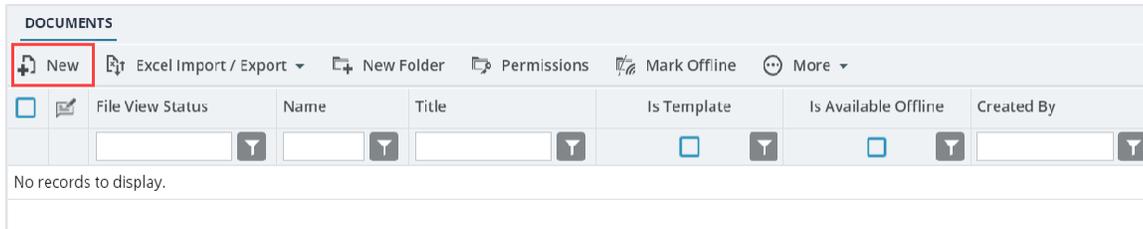


Figure 56: New Option

The **NEW DOCUMENT** page is displayed.

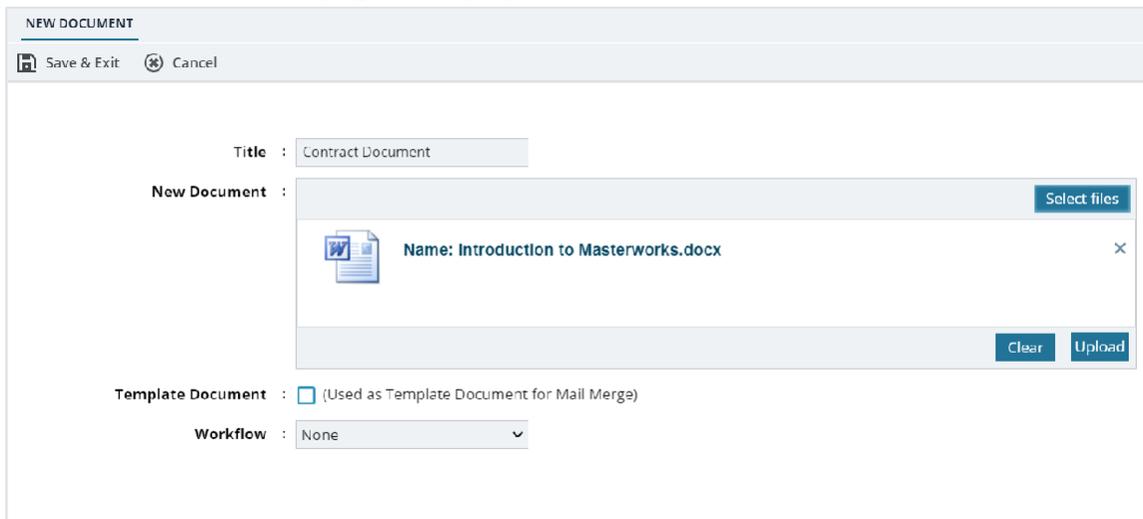


Figure 57: New Document

Note: You can configure additional attributes for a document while uploading it. These attributes vary based on the document properties selected for a project during project creation. Document property templates are defined in the **Document Properties** catalog of the **Library** module.

3. In the **Title** box, enter the document name.

Note: If you do not enter the title, the name of the file is updated in the Title box.

4. To upload documents, in the **New Document** section, drag and drop the appropriate files.

Alternatively, perform the following steps:

a. Click **Select files**.

The **Open** dialog box is displayed.

b. Click the appropriate document to upload.

Alternatively, to select multiple files to upload, press CTRL, and then click the appropriate documents.

c. Click **Open**.

The selected files are displayed.

- Select the **Template Document** check box to use the document as a template document for the **Mail Merge** feature.

Note: Only files of Word format are used as templates for the **Mail Merge** feature.

- From the **Workflow** drop-down list, select the appropriate workflow to receive approvals from the stakeholder.

Available options are workflows defined for the **Document Management** module.

- Based on the document property template associated with the folder, enter all other details of the document.

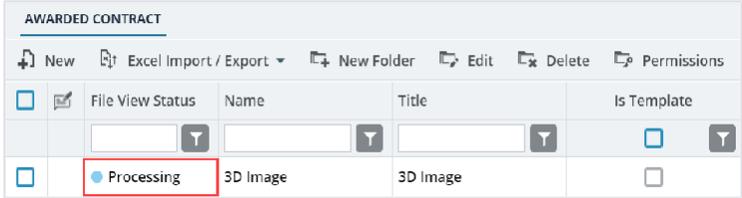
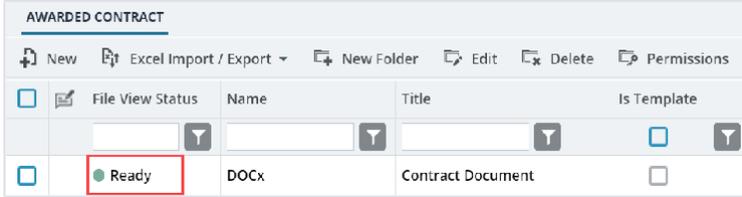
- Click **Save & Exit**.

The list page of the folder is displayed.

In the list page, the **File View Status** column displays the current status of the document being uploaded. Each status is associated with a color. You can view the uploaded document only when the status is **Ready**.

Note: If the drawing file viewer is not configured, then the File View Status column is not displayed in the list page.

The following are the different statuses:

Status	Color	Description
Processing	● Blue	Translation in progress For example,  <p style="text-align: center;"><i>Figure 58: Processing Status</i></p>
Failed	● Red	Translation failed
Ready	● Green	File is ready to view For example,  <p style="text-align: center;"><i>Figure 59: Ready Status</i></p>

3.2.3.1. Uploading Documents in Bulk

Prerequisites

- The role of the logged-in user must be one of the following:
 - Administrator
 - Design Component Lead
 - Lead Designer
 - Highway Design Manager
 - Project Manager
 - A/E Lead Designer
 - A/E Manager
 - Acquisitions
 - Construction Component Lead
 - Construction Admin Staff
 - Construction Engineer
 - Highway Construction Manager/QAQC
 - Construction Operations Engineer
 - Construction Contractor CDRs
 - Construction Contractor Basic
 - Construction Contractor QC Manager
 - Construction Contractor Manager
 - Project Engineer
 - Regional Engineer
 - Assistant Project Engineer A&E
 - Project Engineer A&E

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).

- The document file type is an allowed file type as configured in the application. For information on allowed file types, refer to **Application Settings** section in **Administrator Guide**.
- A document of the same name does not exist in the folder.

Overview

You can upload up to 200 documents, images, or other files to folders in the **Documents** module in bulk at once. You can also add metadata information to documents uploaded to the application.

Steps

1. To access Documents folder at the project or contract level, perform the following steps:

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

The **PROJECTS** list page is displayed.

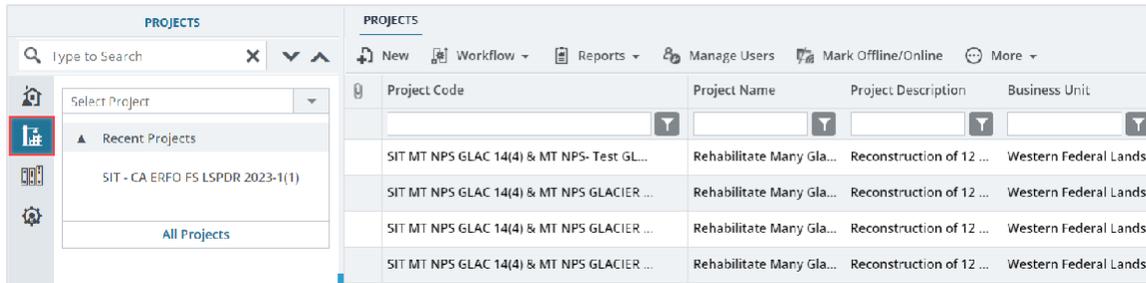


Figure 60: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

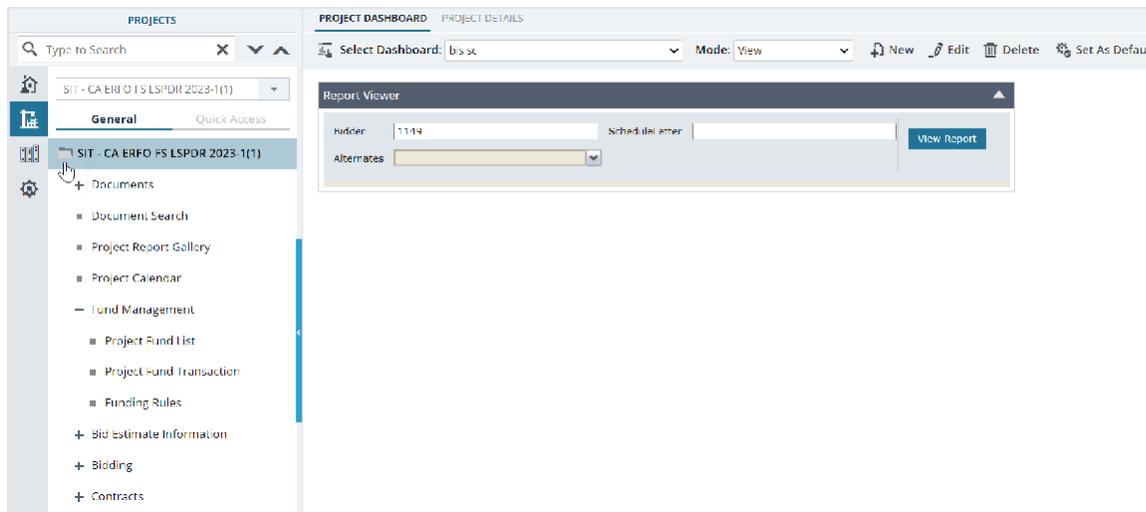


Figure 61: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

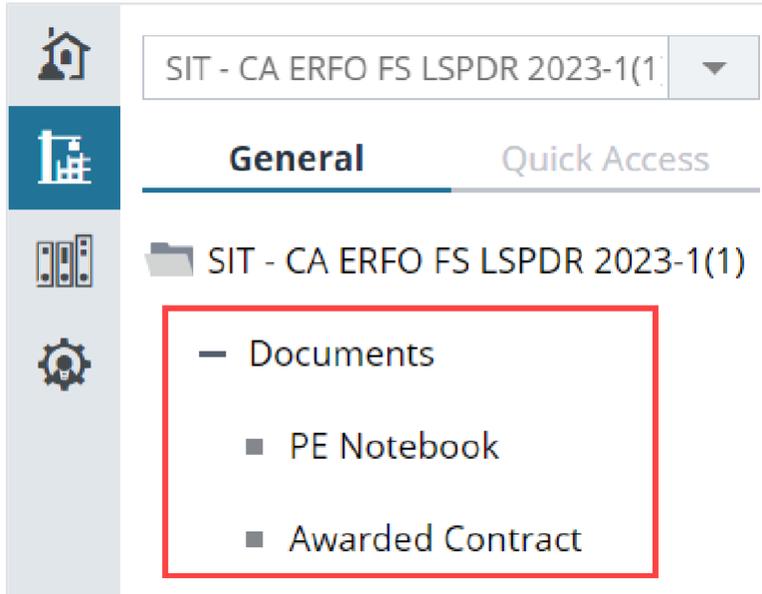


Figure 62: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - In the navigation pane, expand the **Contracts** folder, and then expand the contract.

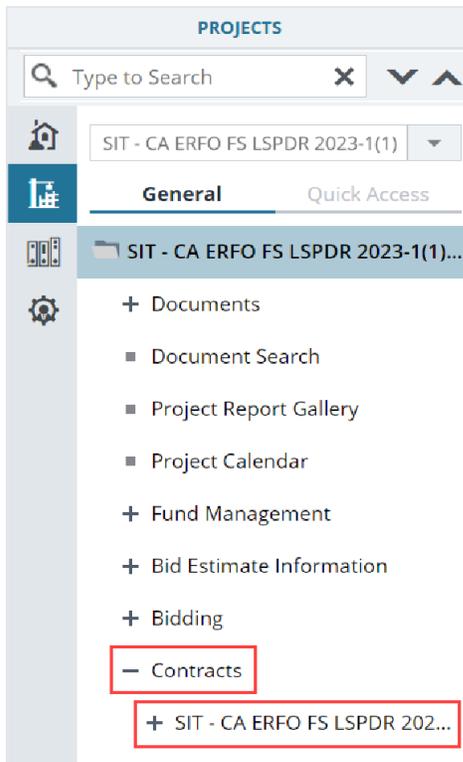


Figure 63: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

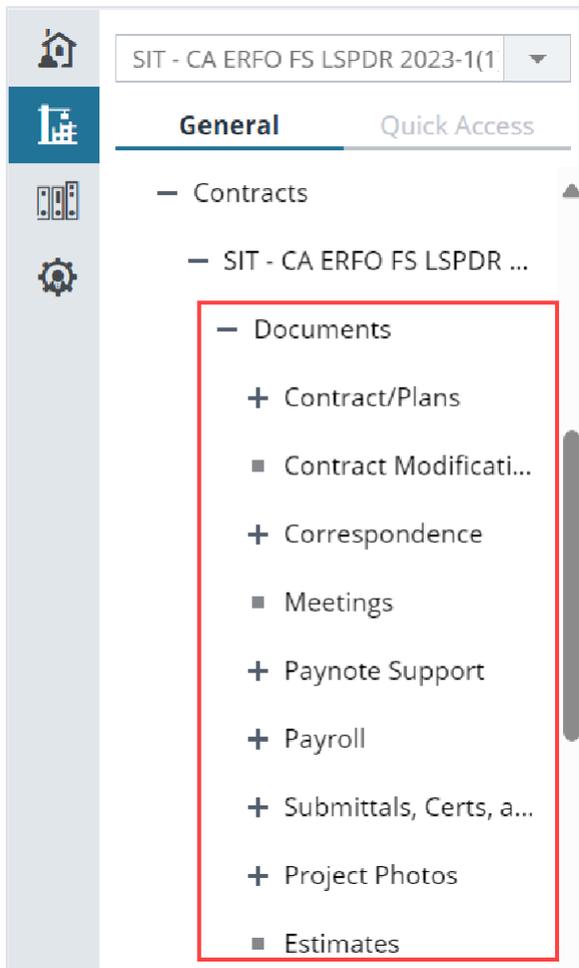


Figure 64: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

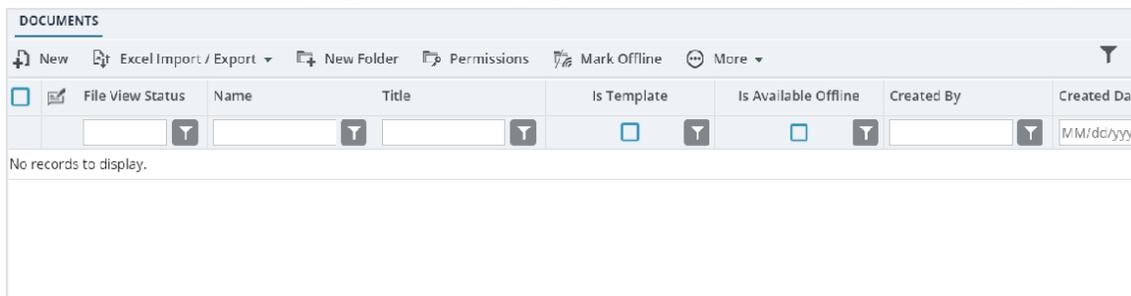


Figure 65: Documents List Page

2. Click **Excel Import / Export**, and then click **Document Import**.

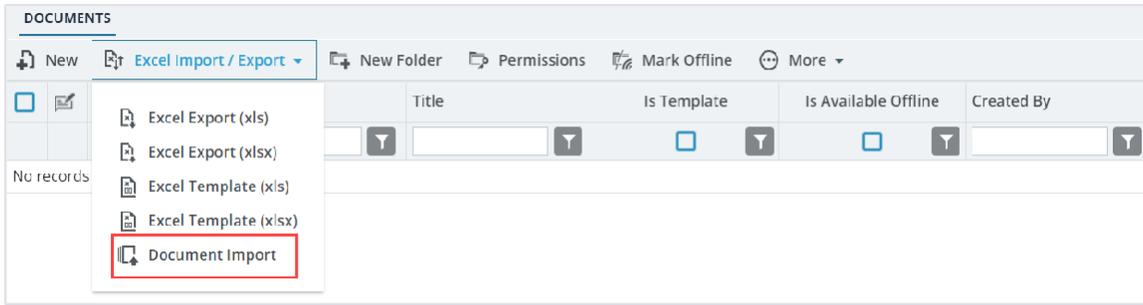


Figure 66: Document Import Option

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

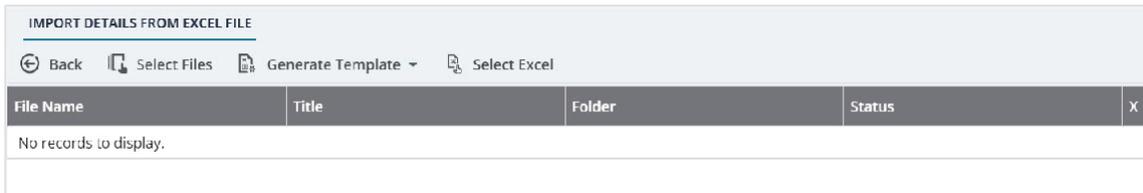


Figure 67: Import Details from Excel File

3. Click **Select Files**.

The **Open** dialog box is displayed.

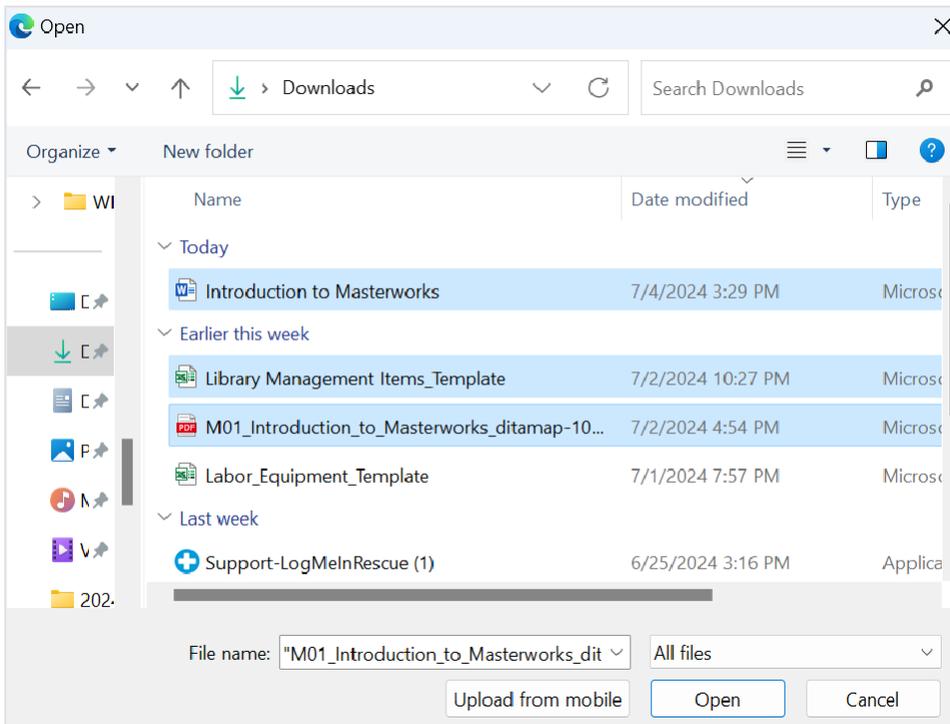


Figure 68: Open Dialog Box

4. Press CTRL, and then click the appropriate files to upload.

5. Click **Open**.

The selected files are displayed.

File Name	Title	Folder	Status	X
Introduction to Masterworks.docx	Introduction to Masterworks		Selected	X
Library Management Items_Template.xls	Library Management Items_Template		Selected	X
M01_Introduction_to_Masterworks_dita map-10010- M01_Introduction_to_Masterworks.pdf	M01_Introduction_to_Masterworks_dita map-10010- M01_Introduction_to_Masterworks		Selected	X

Figure 69: Import Details From Excel File

6. To remove a file from the list, corresponding to the appropriate file, in the **X** column, click **x**.

7. Click **Generate Template**, and then click **Excel Template with Data**.

File Name	Title	Folder	Status	X
Introduction to Masterworks.docx	Introduction to Masterworks		Selected	X
Library Management Items_Template.xls	Library Management Items_Template		Selected	X
M01_Introduction_to_Masterworks_dita map-10010- M01_Introduction_to_Masterworks.pdf	M01_Introduction_to_Masterworks_dita map-10010- M01_Introduction_to_Masterworks		Selected	X

Figure 70: Generate Template Option

An Excel workbook named **Metadata_Template** comprising the list of selected files is downloaded to your downloads folder.

8. Open the template workbook, and then perform the following steps:

a. Ensure the format for the cells in the Excel worksheet is **Text** by default.

To set the format of the cells to Text, perform the following steps:

i. Press **Ctrl + 1**.

The **Format Cells** dialog box is displayed.

ii. In the **Number** tab, in the Category list, click **Text**.

iii. Click **OK**.

b. The name of the file is updated in the **Title** column. Optionally, in the **Title** column, enter the title of the files.

c. In the **Folder** column, select the folder to which the file must be uploaded to.

Available options are names of folders in the **Documents** folder of the project or contract that have the same document property assigned.

d. Enter the appropriate information in the other columns.

Available column names depend on the associated document property page selected for the folder.

e. Click **Save**.

9. In the **IMPORT DETAILS FROM EXCEL** page, click **Select Excel**.
The **Open** dialog box is displayed.
10. Click the appropriate **Metadata_Template** file, and then click **Open**.
The **Status** column displays **Validated Successfully** for all files that are ready for uploading.
If a file is not validated, an error message is displayed, and the Status column displays the reason for the error. You can also download the error log.
If an error occurs, perform the following steps:
 - a. To view the error log, click **Error Log**.
Error messages in the cells are highlighted in red. Tabs in the workbook are also highlighted to indicate the presence of errors.
 - b. Update the **Metadata_Template** file to correct the error.
Optionally, you can make relevant corrections in the error log workbook and upload it.
 - c. In the **IMPORT DETAILS FROM EXCEL** page, click **Select Excel**.
The **Open** dialog box is displayed.
 - d. Click the updated **Metadata_Template** file, and then click **Open**.
11. Click **Save**.
The **Status** column displays successful for all files that are uploaded successfully.

3.2.4. Downloading Documents

You can download a document, any version of a document, and an annotated copy of the document.

3.2.4.1. Downloading Documents

Prerequisites

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

- Administrator
- Design Component Lead
- Designer
- Lead Designer
- Design QA/QC
- Highway Design Manager
- Project Manager
- A/E Designer
- A/E Lead Designer
- A/E Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff

- Construction Engineer
- Highway Construction Manager/QAQC
- Construction Operations Engineer
- Construction Contractor CDRs
- Construction Contractor Basic
- Construction Contractor QC Manager
- Construction Contractor Manager
- Inspector
- Assistant Project Engineer
- Project Engineer
- Regional Engineer
- Construction Inspection A&E Manager
- Inspector A&E
- Assistant Project Engineer A&E
- Project Engineer A&E

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.
The **PROJECTS** list page is displayed.

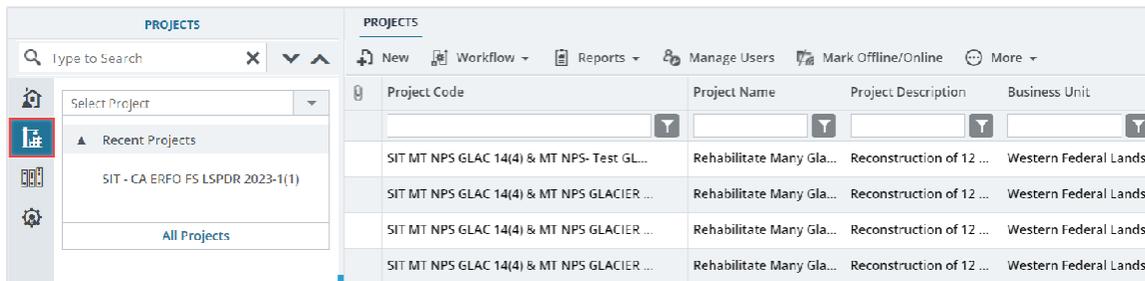


Figure 71: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

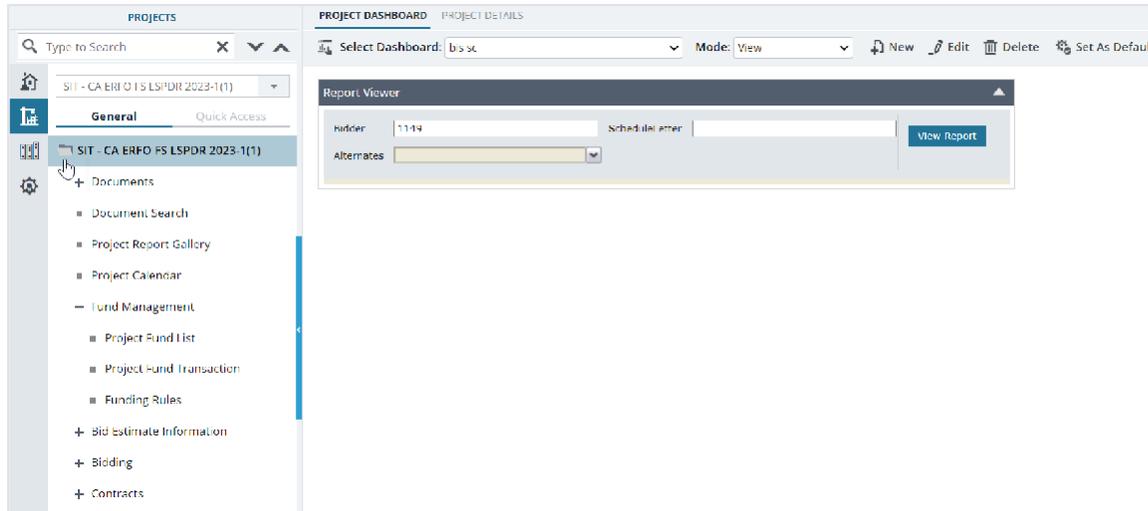


Figure 72: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

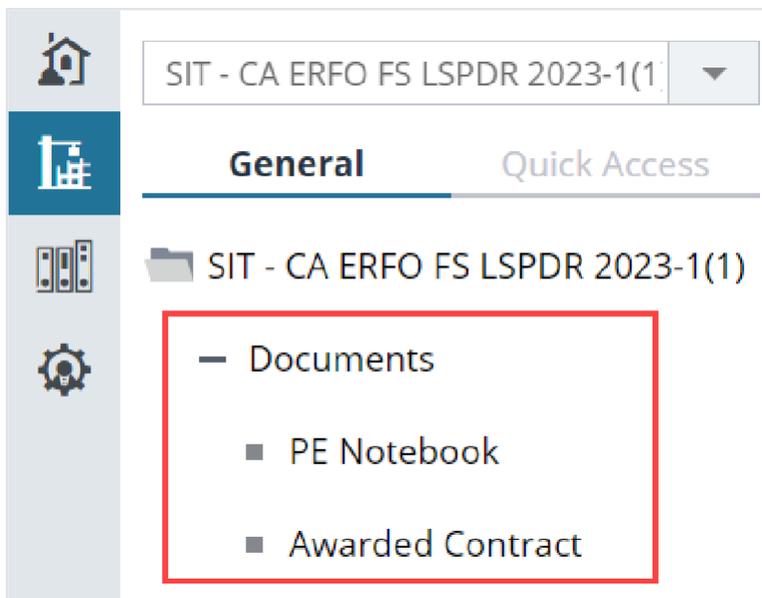


Figure 73: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

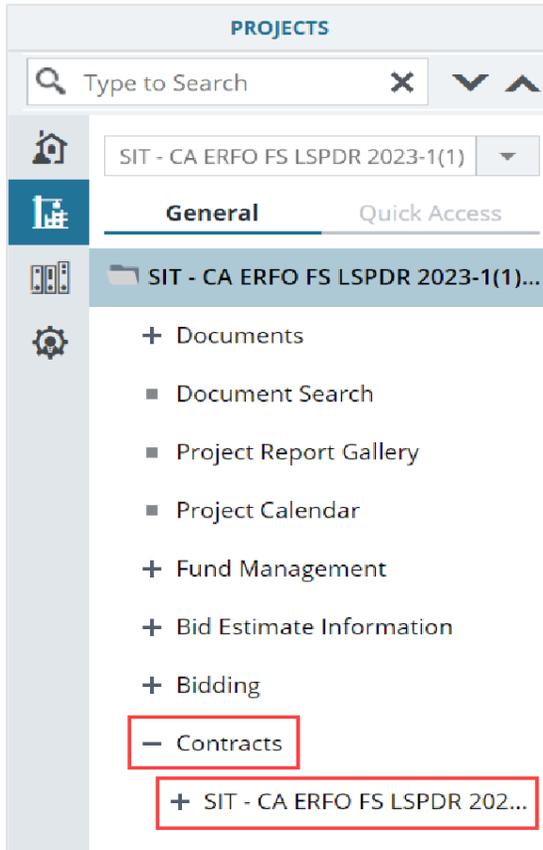


Figure 74: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

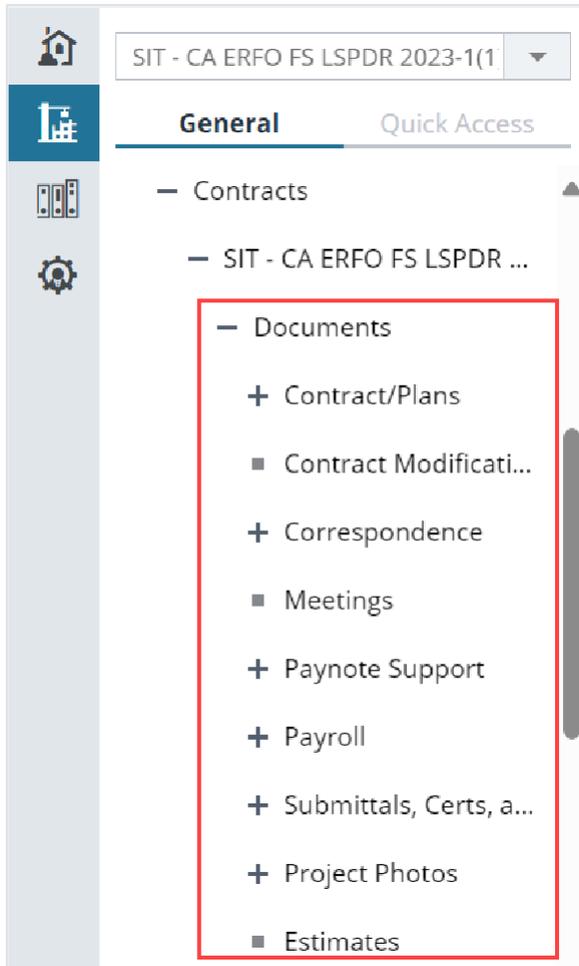


Figure 75: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

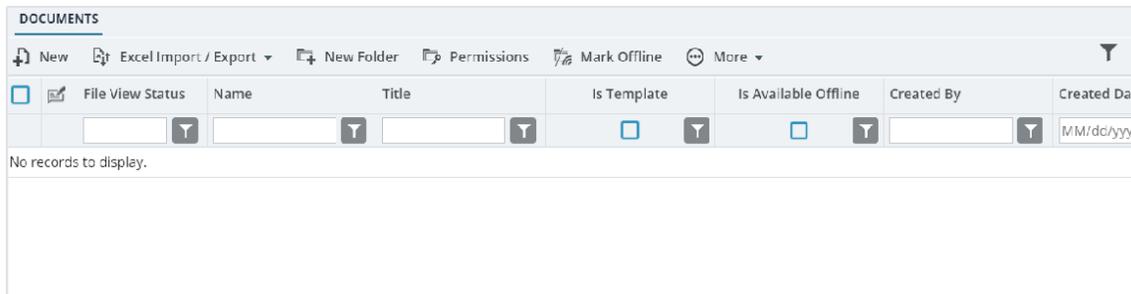


Figure 76: Documents List Page

2. Select the appropriate documents.

Alternatively, to download an attachment of a form, in the list page of the appropriate form, click **Attachments**.

3. Click **Download**.

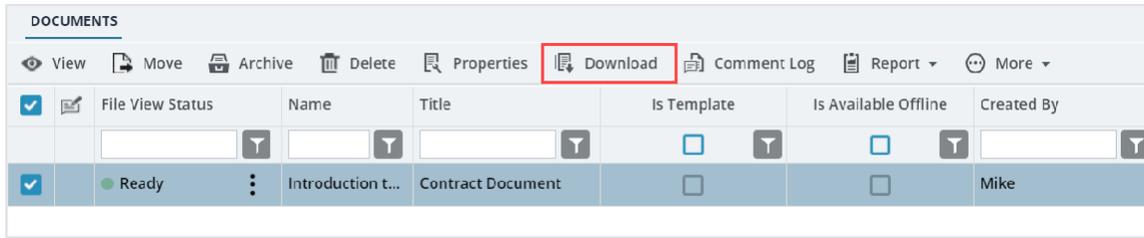


Figure 77: Download Option

If a single file is selected, the file is downloaded to the local hard drive.

If multiple files are selected, the files are downloaded to the local hard drive as a compressed file.

3.2.4.2. Downloading Document Versions

Prerequisites

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

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

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).

Overview

You can download multiple versions of a document with the following options:

- View or download any version of the document
- View or download annotations of any document version

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:

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

The **PROJECTS** list page is displayed.

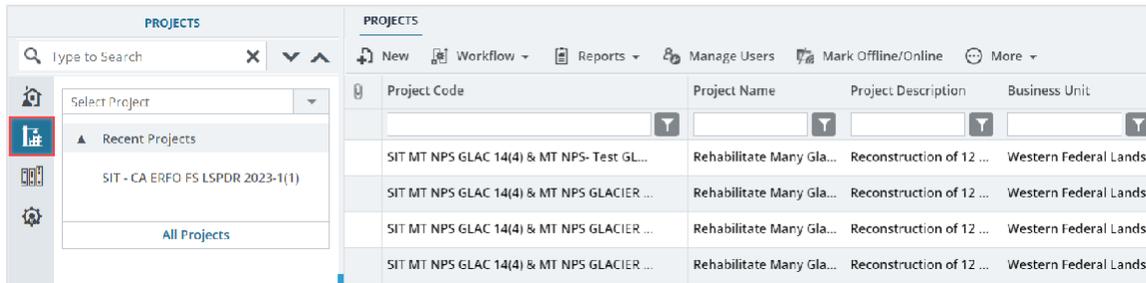


Figure 78: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

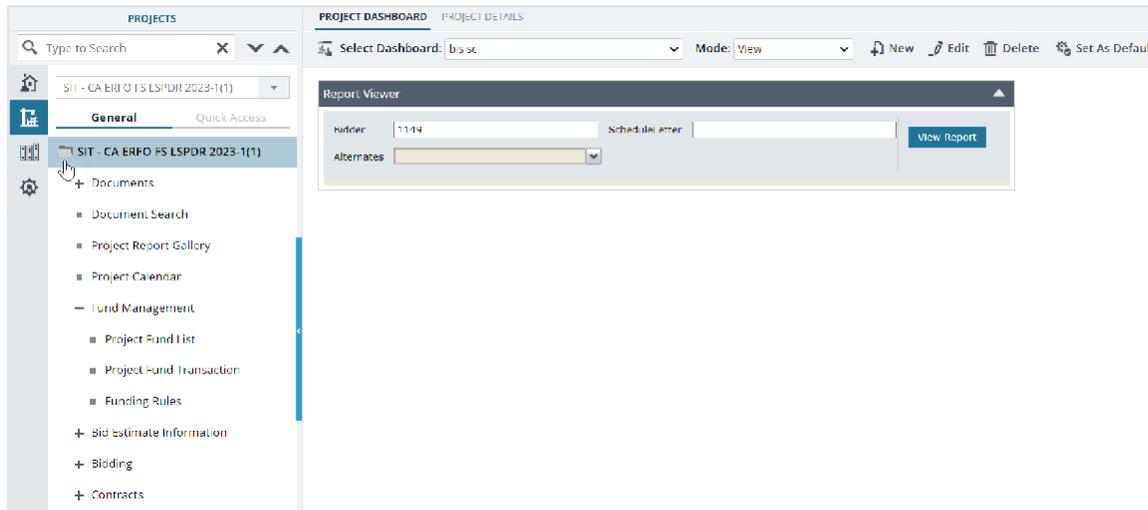


Figure 79: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

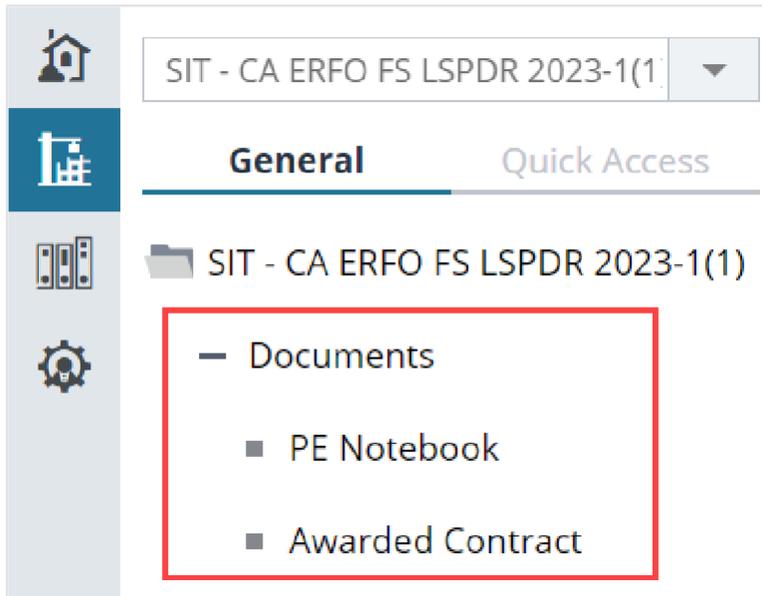


Figure 80: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

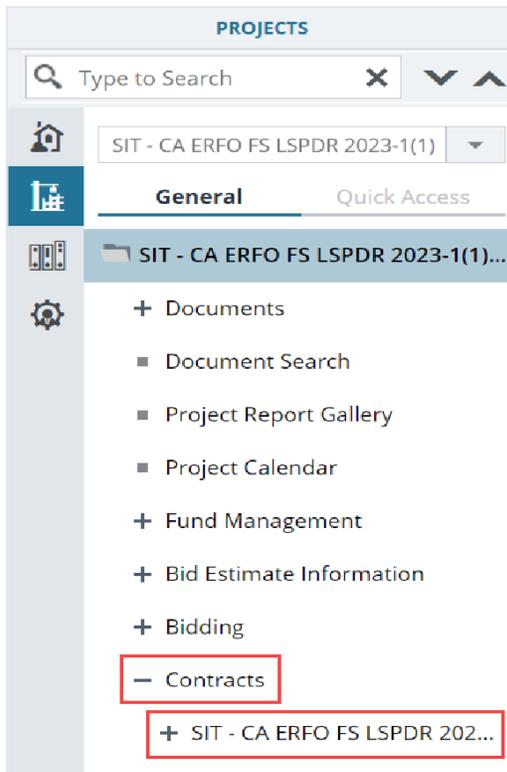


Figure 81: Expanding Contracts

- b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

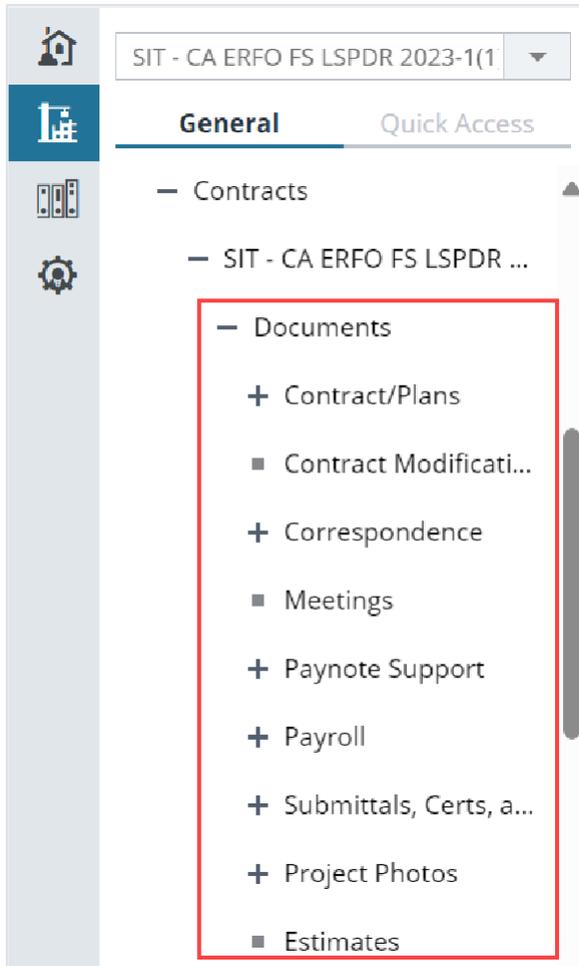


Figure 82: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

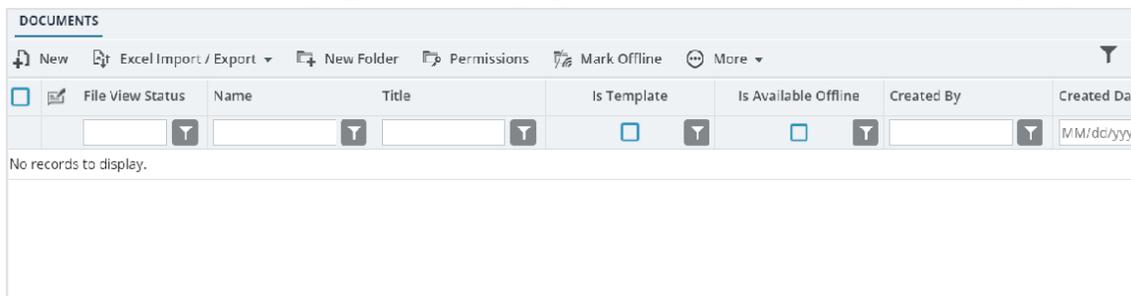


Figure 83: Documents List Page

2. Select the appropriate document.

Alternatively, to download a version of an attachment of a form, in the list page of the appropriate form, click **Attachments**.

3. Click **More**, and then click **Version History**.

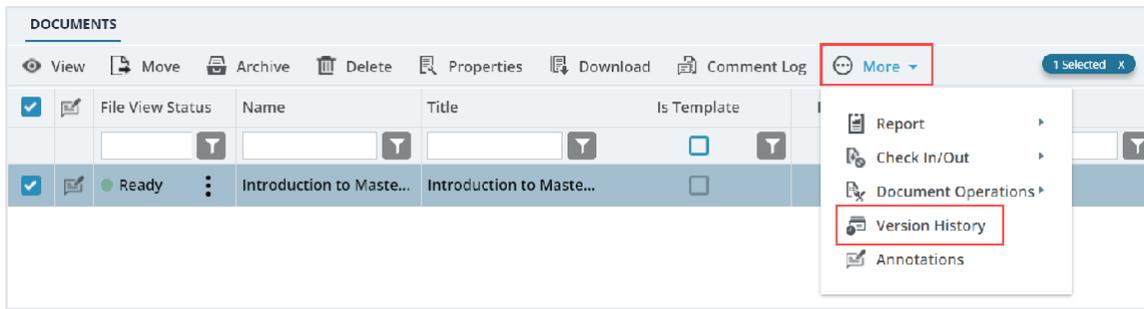


Figure 84: Version History Option

The **Version History** dialog box is displayed.

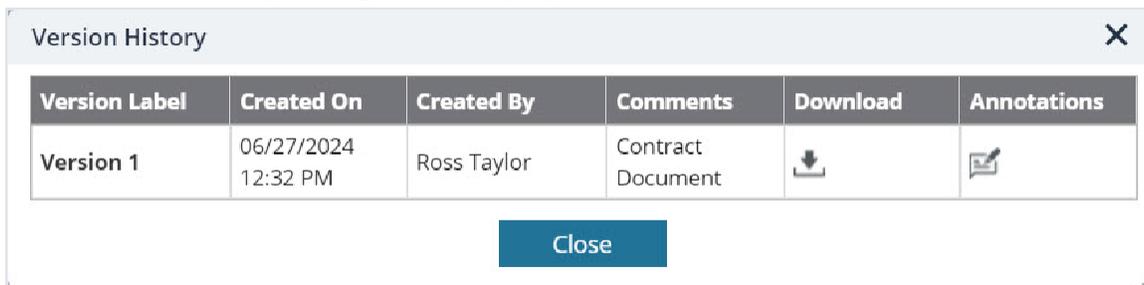


Figure 85: Version History Dialog Box

4. Perform any of the following steps:

- Click to download the corresponding document version to the local hard drive.
- Click to download or view annotated copies of the corresponding document version.

3.2.5. Updating a Document

Prerequisites

- The role of the logged-in user must be one of the following:
 - Administrator
 - Design Component Lead
 - Lead Designer
 - Highway Design Manager
 - Project Manager
 - A/E Lead Designer
 - A/E Manager
 - Acquisitions
 - Construction Component Lead
 - Construction Admin Staff
 - Construction Engineer
 - Highway Construction Manager/QAQC

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

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).

Overview

The **Check Out** feature enables you to modify the existing documents at any time and prevents other users from overwriting the file. The user name of the logged-in user who checked out the document is displayed in the document list.

If a document is wrongly checked out, the **Discard Check Out** feature enables you to restore it to its current version. You can discard a checked-out document only before the document is checked in.

To update a checked-out document, it must be checked in by the user who checked it out. After a document is checked in, the document version number increments by 1.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

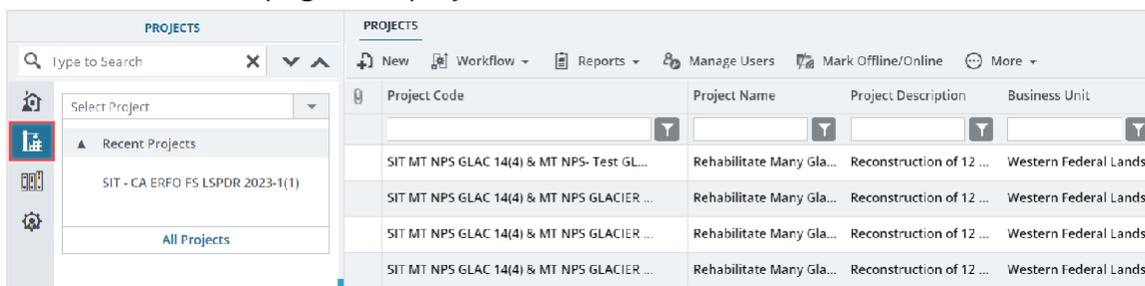


Figure 86: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

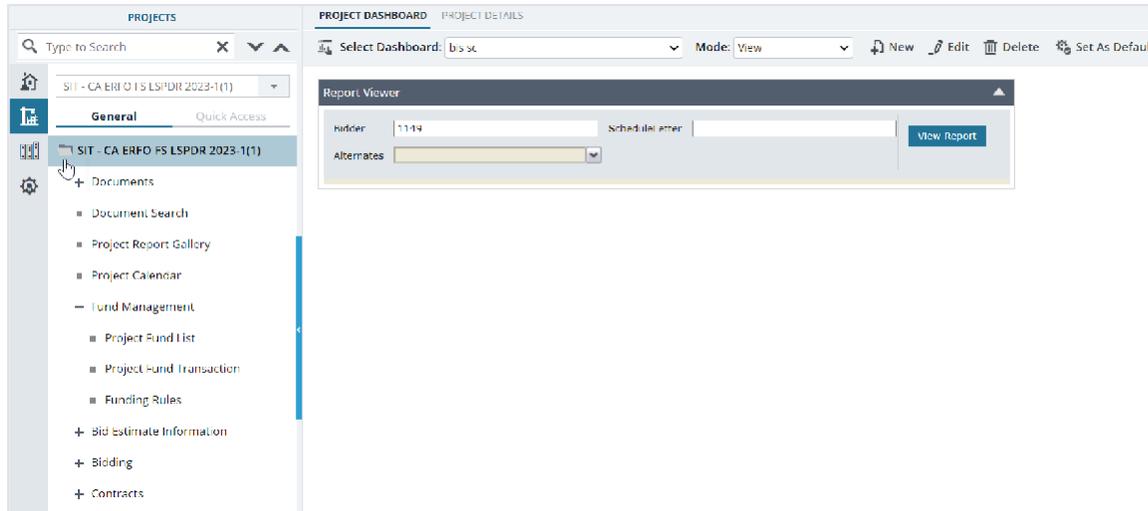


Figure 87: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

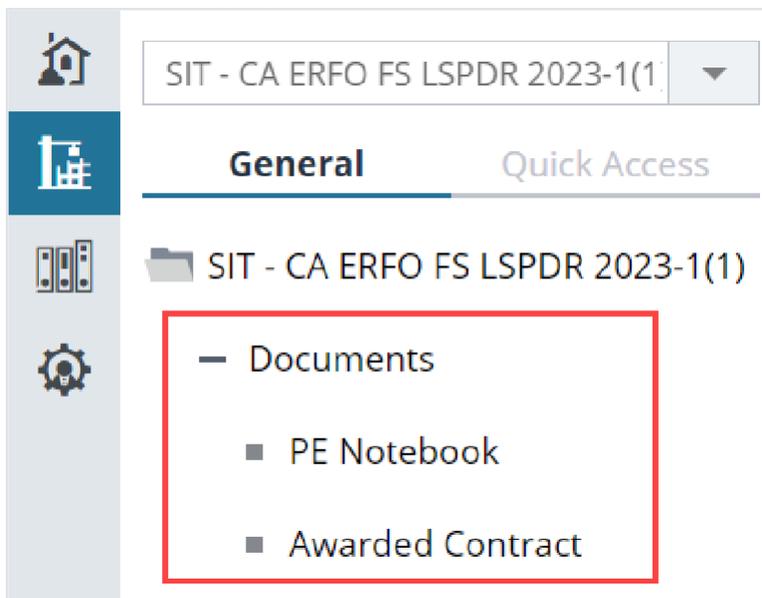


Figure 88: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

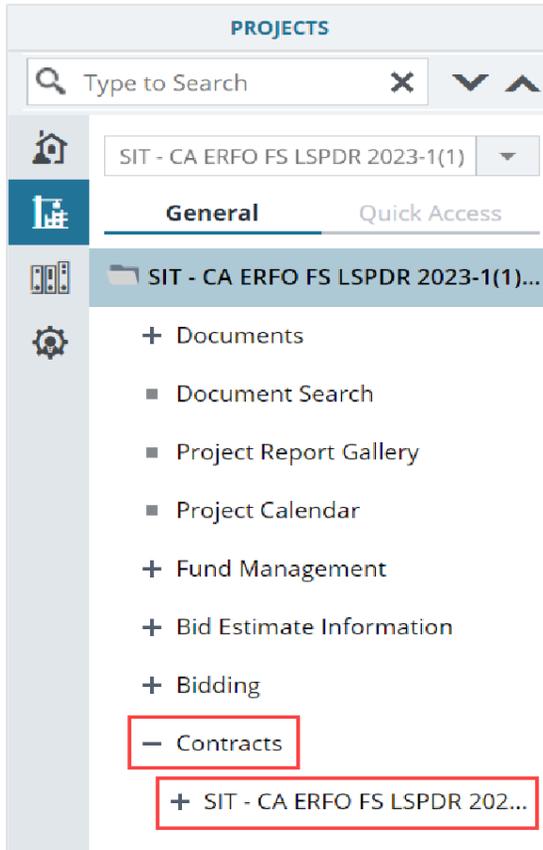


Figure 89: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

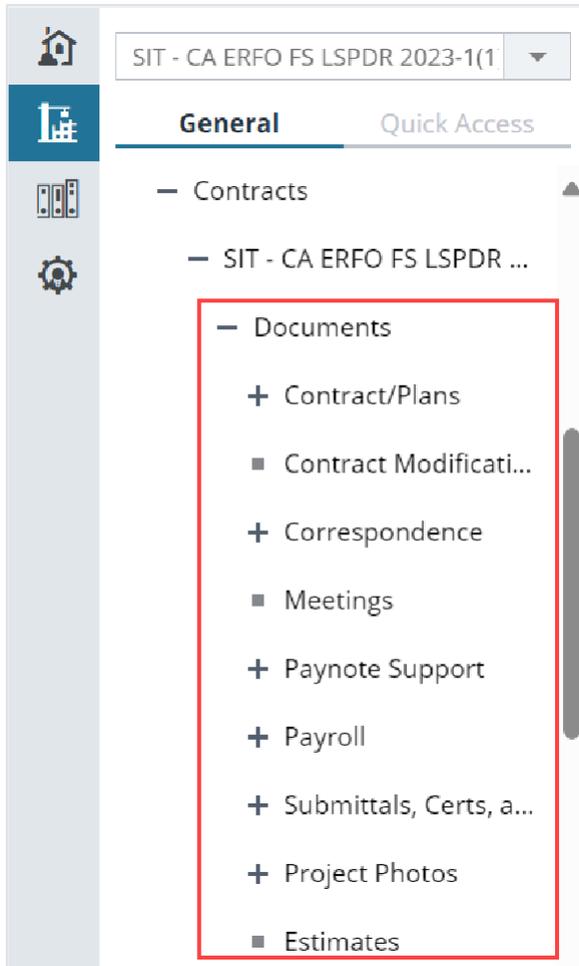


Figure 90: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

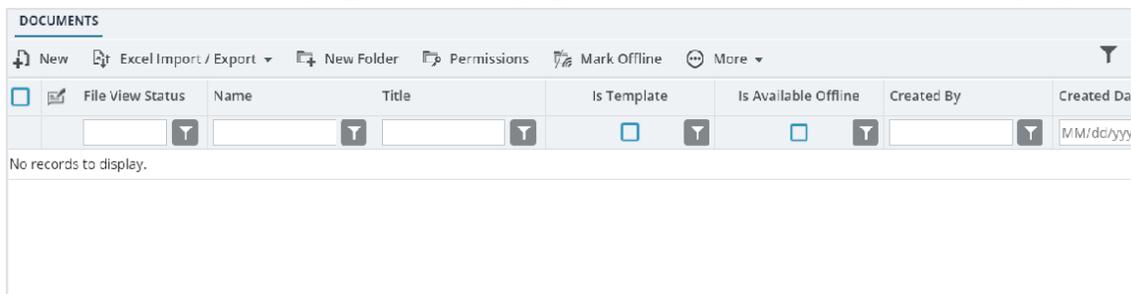


Figure 91: Documents List Page

2. From the list page, select the appropriate document.

3. Click **Check In/Out**, and then click **Check Out**.

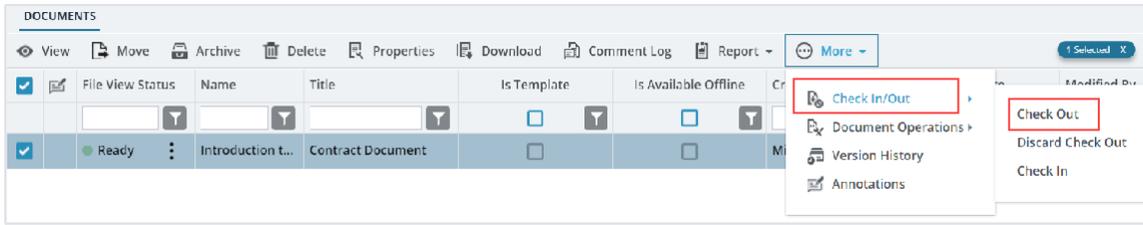


Figure 92: Check In/Out Option

The file is downloaded to the local hard drive.

Note: If you want to discard the check-out, click **Check In/Out**, and then click **Discard Check Out**.

4. Make necessary modifications to the document, and then save the document.
5. In the documents list page, select the checked-out document.
6. Click **Check In/Out**, and then click **Check In**.

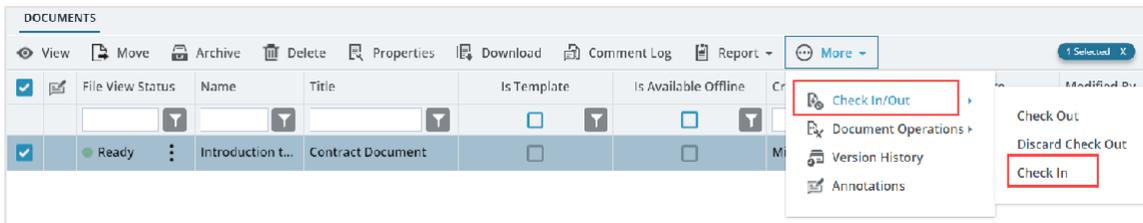


Figure 93: Check In Option

The **CHECK IN DOCUMENT** page is displayed.

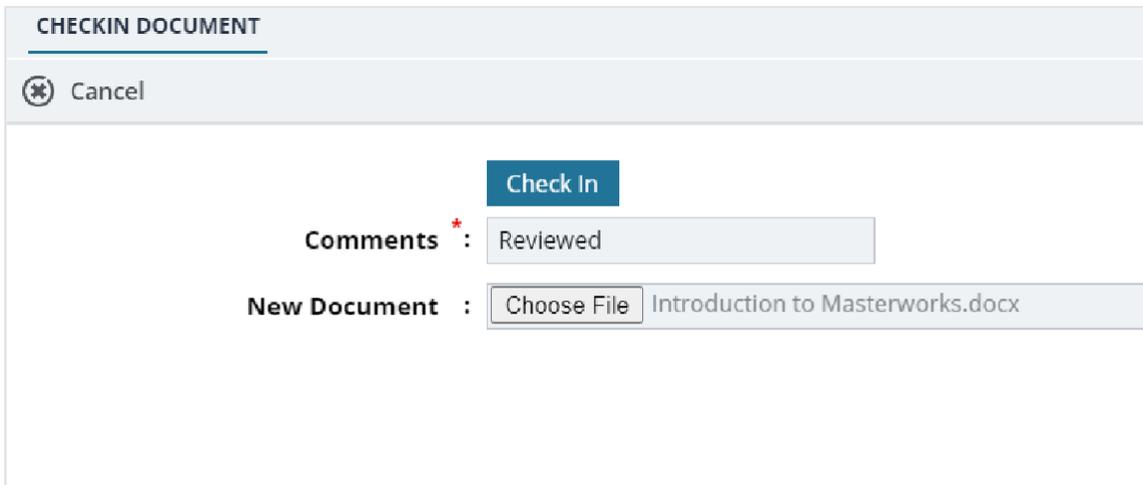


Figure 94: Check In Document

7. In the **Comments** field, enter details about the modified document.

8. To upload the updated document, perform the following steps:
 - a. In the **New Document** field, click **Choose File**.
The **Open** dialog box is displayed.

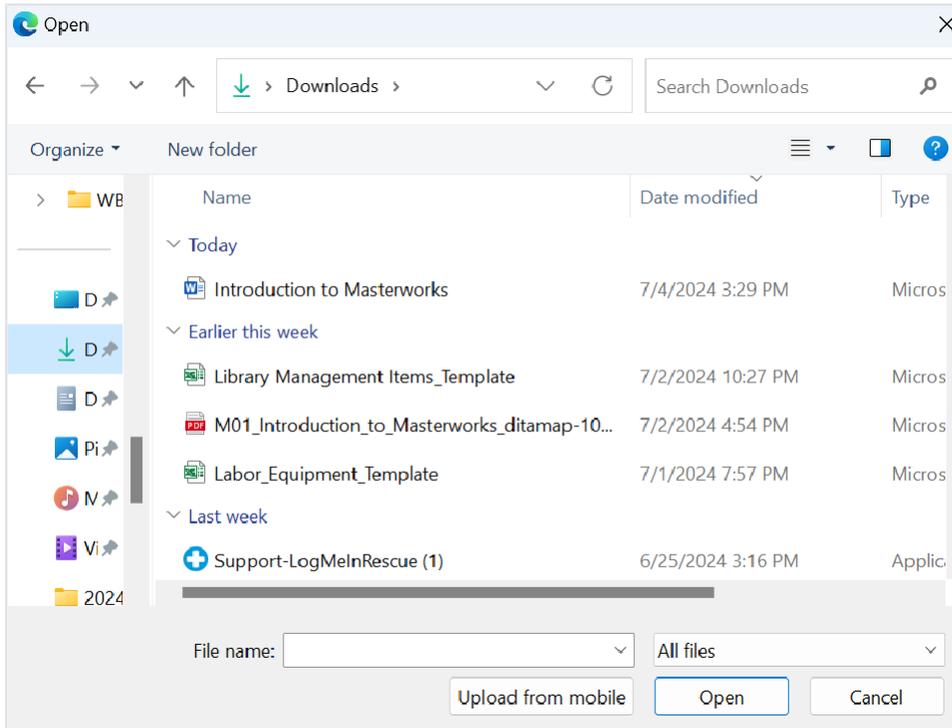


Figure 95: Open Dialog Box

- b. Click the updated document, and then click **Open**.
9. Click **Check In**.
The version number of the document increments by **1**.

3.2.6. Annotations

You can add annotations to files of various formats in Masterworks. Annotations added to a file do not affect the original file. A file with annotations is saved as an annotated copy of the original file. You can also consolidate the annotations provided by multiple stakeholders into a single document.

You can annotate the following files:

- [3.2.6.1. Files in the document folders of the Documents module](#)
- [3.2.6.3. Files attached to various form records in the application](#)

You can access the following files:

- [3.2.6.2. Annotated files](#)
- [3.2.6.4. Annotated attachment files](#)

Note: You cannot delete or edit annotations created by other users.

Annotations for document or image files:

Term	Icon	Function
Select		To select and manage annotation objects
Line		To draw a simple line
Rectangle		To draw a rectangle. To make a square annotation, hold down the Shift key and draw the rectangle.
Ellipse		To draw an ellipse. To make a circle annotation, hold down the Shift key and draw the ellipse.
Polyline		To draw a series of points that create a sequence of lines joined
Polygon		To draw a series of points that create a sequence of lines joined in the shape of a polygon
Pointer		To draw a pointed line
Freehand		To draw a series of points that create a sequence of lines joined
Text		To enter text in the rectangular dialog box. To make a square dialog box, hold down the Shift key and draw the rectangle.
Text Pointer		To enter text in the rectangular dialog box with the line pointing to the object in the viewer window. To make a square dialog box, hold down the Shift key and draw the rectangle.
Note		To add notes in the viewer window. To make a square dialog box, hold down the Shift key and draw the rectangle.

Term	Icon	Function
Stamp		To add stamp annotations
Rubber Stamp		To add a specific authentication to the viewing object
Ruler		To add a line that can measure the distance between two points of the viewing object
Poly Ruler		To measure the distance of an irregularly shaped object, a series of points that create a sequence of joined rulers. You can modify the length, add, or remove the ruler segments; a running total of the distance is displayed.
Text Strikeout		To strikeout the text annotation
Text Underline		To underline the text annotation
Comment		<ul style="list-style-type: none"> To add comments to an annotation To add responses to comments on an annotation To add responses to responses on comments on an annotation To set the status of responses to an annotation
Properties	-	Right-click an annotation to: <ul style="list-style-type: none"> Format an annotation by: <ul style="list-style-type: none"> Filling the annotation Striking the annotation Adding a hyperlink to the annotation View and add comments and responses

Files in folders in the Documents module:

The following table describes the permissions required to add annotations to files:

Permissions	Activity
View	Create annotations.
	View annotations created by you and other users.
Edit	Edit annotations created by you. Note: If a document's file type is mapped to a viewer supporting drawing files, then you cannot edit or update the annotations after the file is saved.
Delete	Delete annotations created by you.

Files as attachments in forms without workflows:

The following table describes the permissions required to add annotations to files:

Permissions	Activity
Edit	Create annotations.
View	View annotations created by you and other users.
Delete	Delete annotations created by you.

Files as attachments in forms with workflows:

The following table describes the permissions required to add annotations to files.

Stakeholder Type	Activity
Action Stakeholder	Create annotations.
	View annotations created by you and other users.
View Stakeholder	View annotations created by you and other users.

3.2.6.1. Annotating a File

Overview

You can annotate files of various formats.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

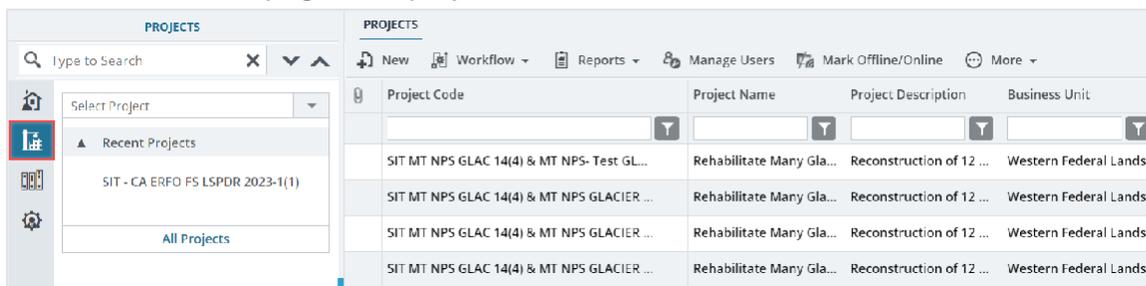


Figure 96: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

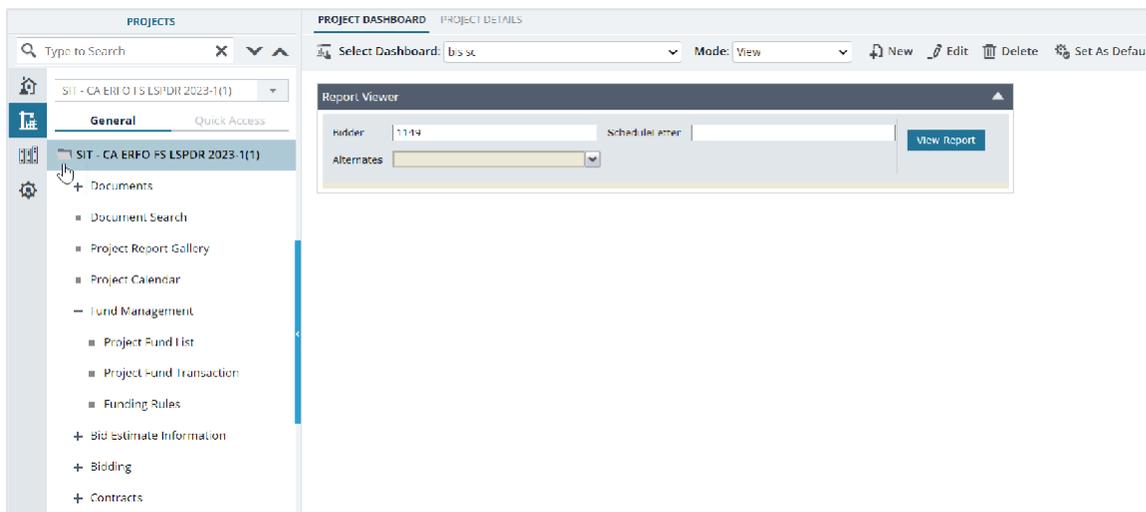


Figure 97: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

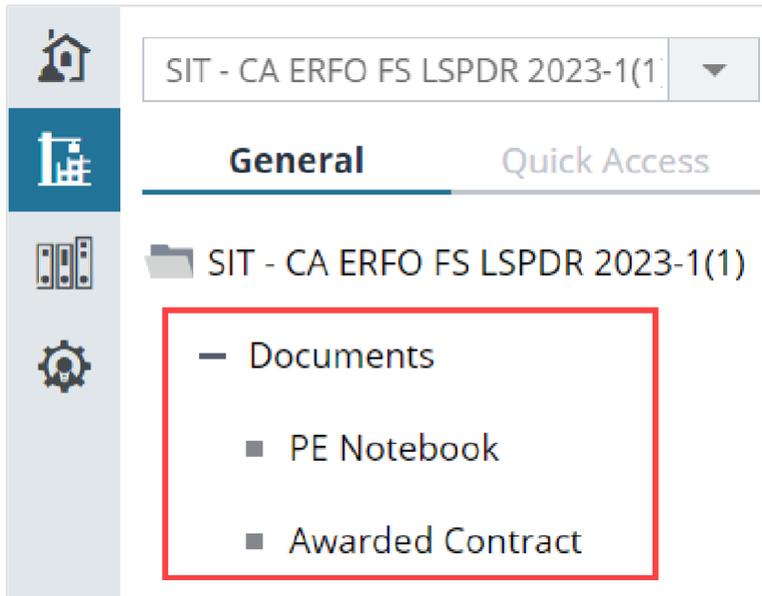


Figure 98: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

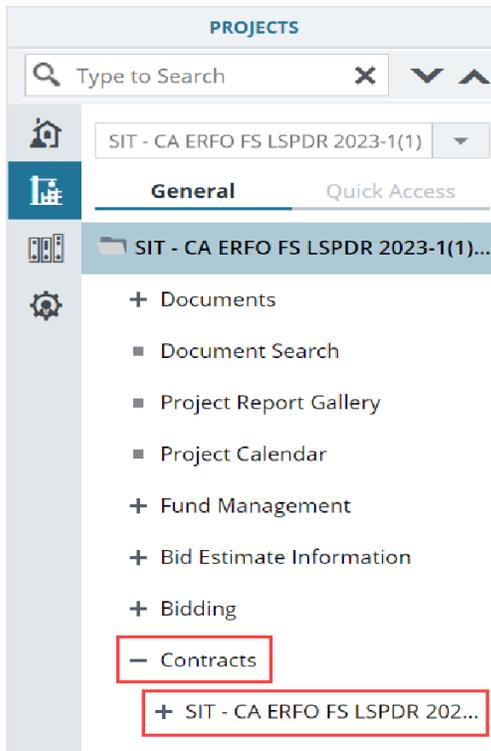


Figure 99: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

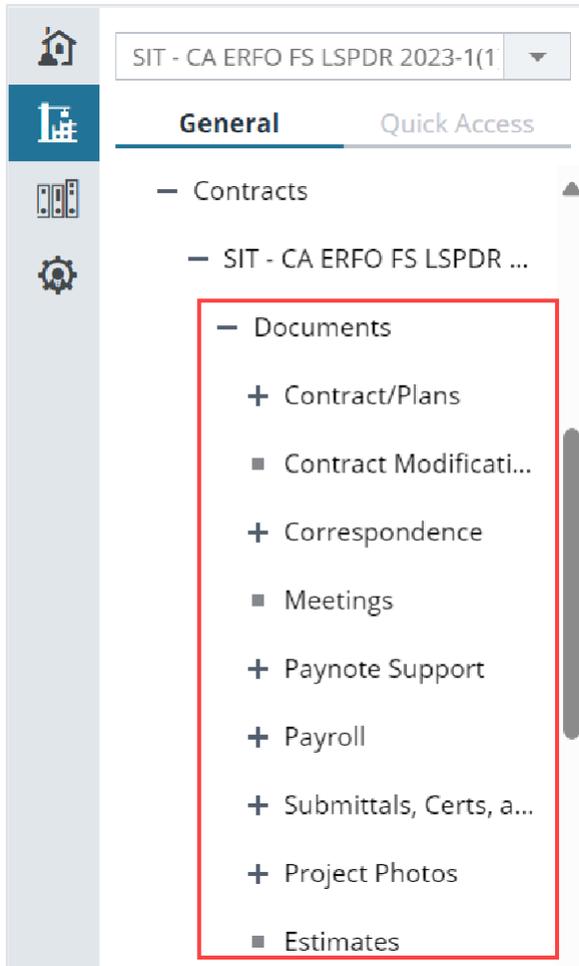


Figure 100: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

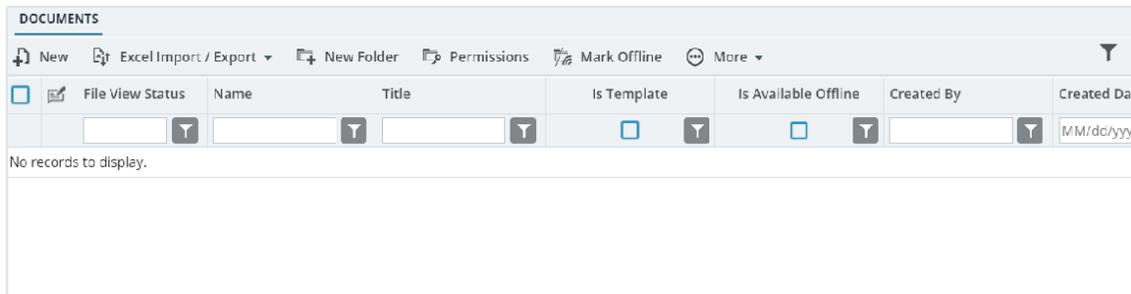


Figure 101: Documents List Page

2. Select a document to add annotations.

3. Click **More**, and then click **Annotations**.

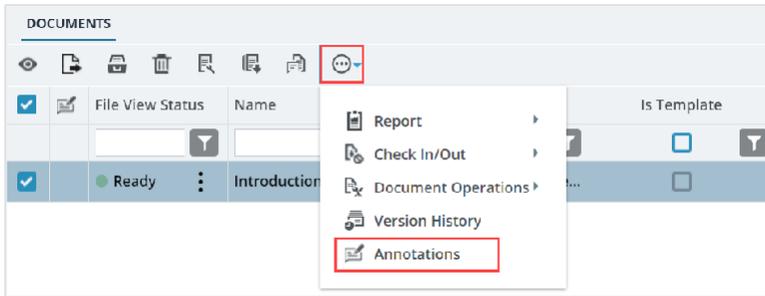


Figure 102: Annotations Option

The **DOCUMENT ANNOTATION** page is displayed.



Figure 103: Document Annotation Page

4. Click **New**.

The file is opened in the document viewer.

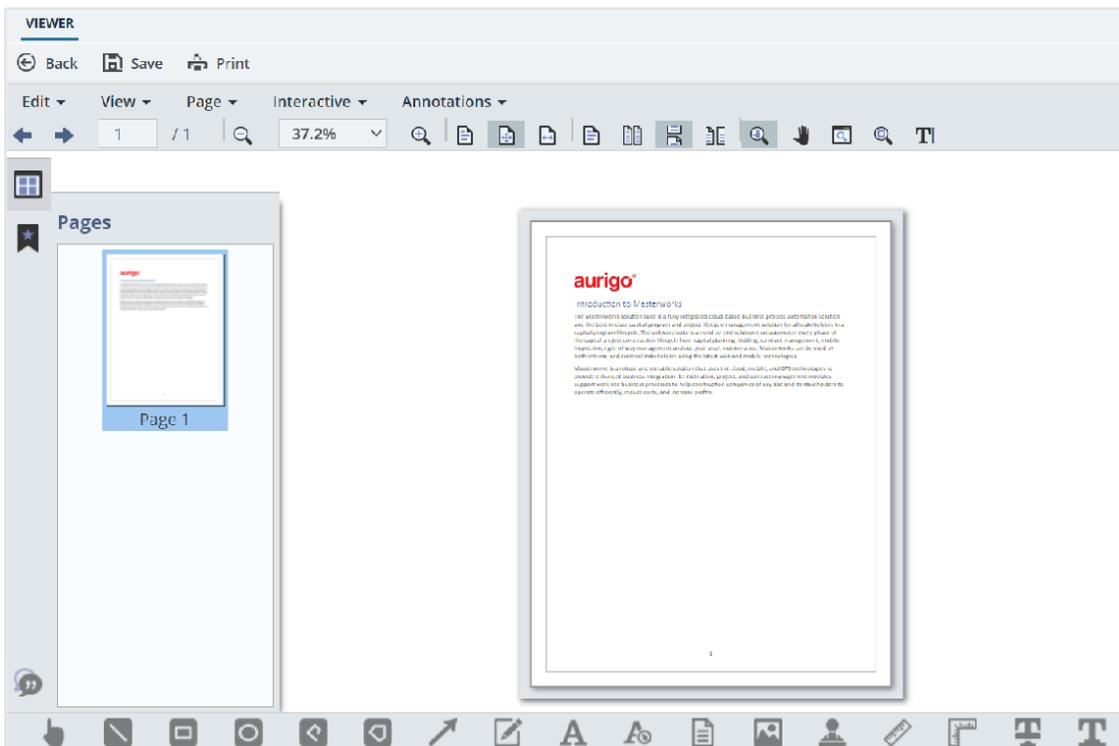


Figure 104: Viewer Page

5. If the file is a 3D drawing, then in the **VIEWER** page, in the toolbar, click . The annotations toolbar is displayed.

Note: Some tools on the toolbar, such as **Section Analysis** and **Explode Model**, are specific to 3D drawings. When the viewer displays a 2D model, the toolbar contains tools that apply to 2D drawings.

6. Click the required annotation and add it to the opened file in the viewer.

You can annotate documents using the various annotation options that are available.

7. Click **Save**.

On saving the annotated file, a copy of the file with the annotations is saved in the **DOCUMENT ANNOTATION** list page of the document.

Details such as the date and time the annotations were added, and the reviewer's name, are saved.

The annotated file name is appended with the reviewer's name.

Note: If a document's file type is mapped to a viewer supporting drawing files, then you cannot edit or update the annotations after the file is saved.

8. To print the document along with the mark ups, perform the following steps:

- a. Click **Print**.

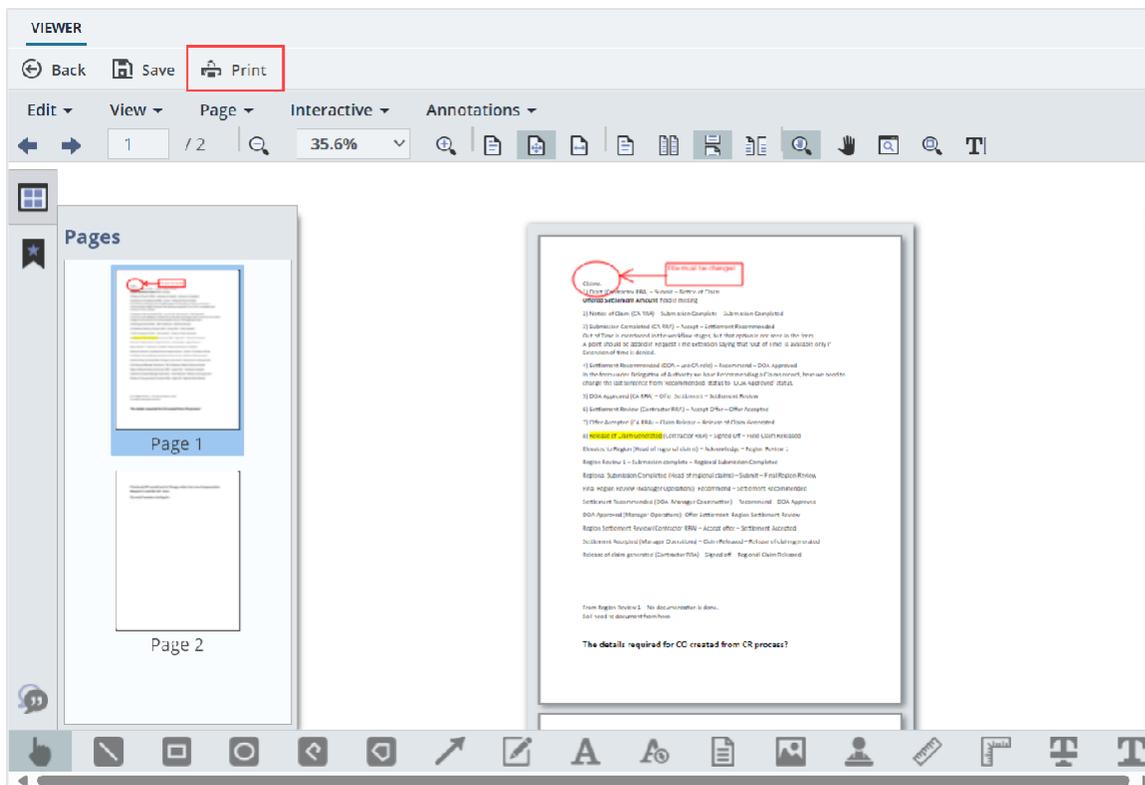


Figure 105: Print Option

The **Print Document** page is displayed.

Print Document

Pages

Print All

Print Current (Page 1)

e.g. 1-3, 5

Print Visible Area (2 pages)

Sizing

The size of first page is 8.50 x 11.00 in/ 215.90 x 279.40 mm. Pages are scaled to fit and centered within the container.

Page Size: Use size of first page

Orientation

Container Orientation: Portrait

The browser's print dialog will need to have an orientation set to match the above value.

Rotate page for best fit within container

Additional Options

DPI: 300

Show Annotations

Remove Margins

Print Close

Figure 106: Print Document Page

- b. Ensure the **Show Annotations** option is selected.
- c. Click **Print**.
A dialog box is displayed.
- d. Set the formatting details of the print and click **Print**.

3.2.6.2. Accessing Annotated Files

You can access all annotated copies of a document and all annotated copies of all versions of the document.

3.2.6.2.1. Accessing annotated copies of the current version

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

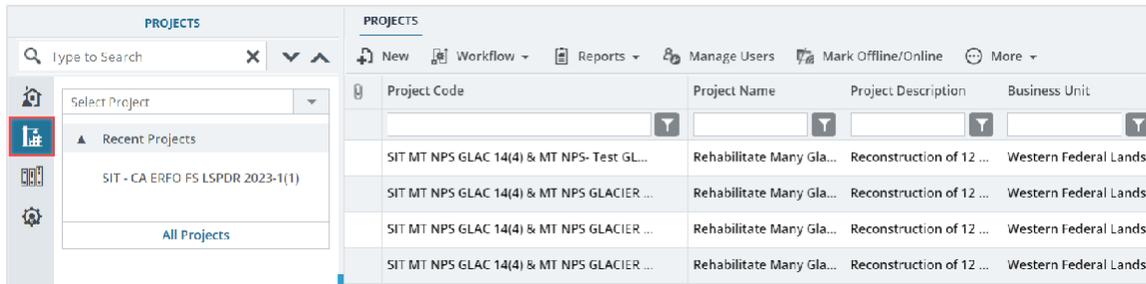


Figure 107: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

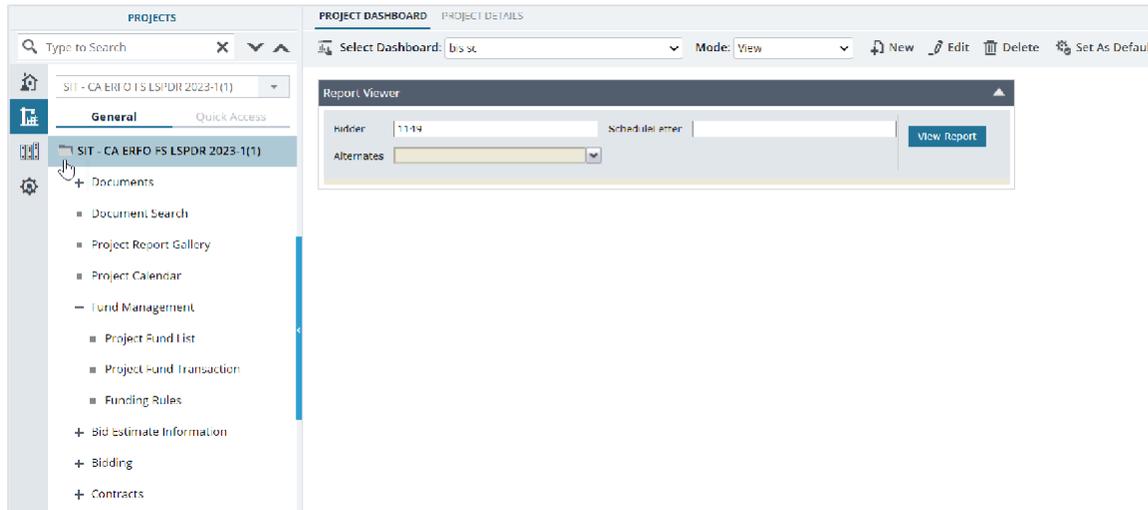


Figure 108: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

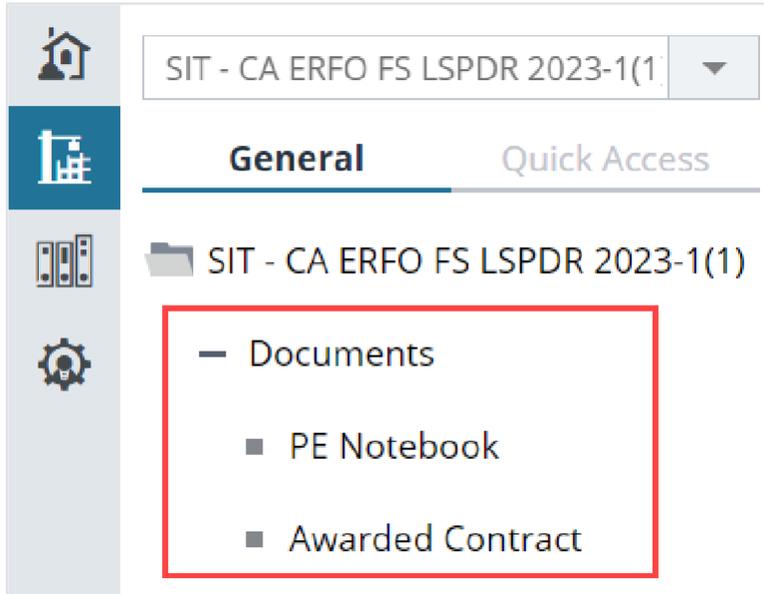


Figure 109: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - In the navigation pane, expand the **Contracts** folder, and then expand the contract.

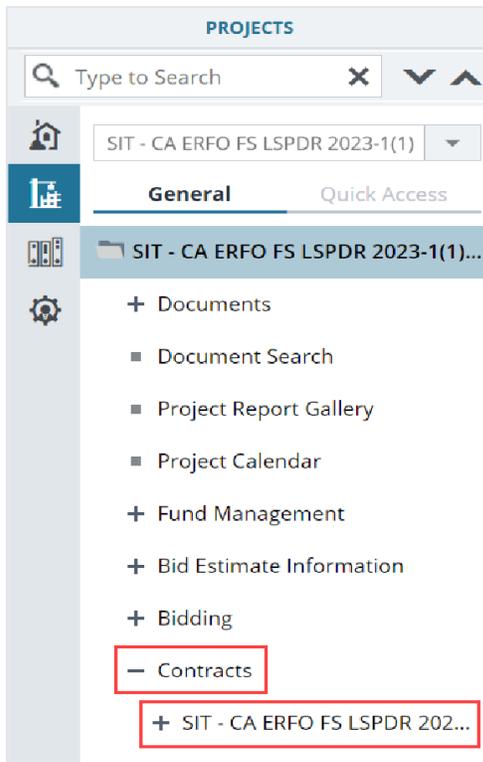


Figure 110: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

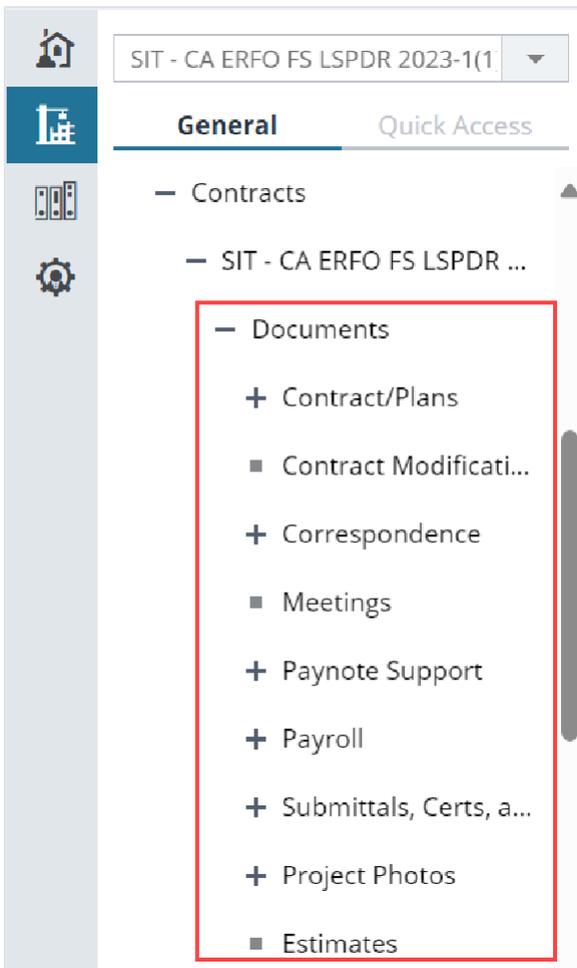


Figure 111: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

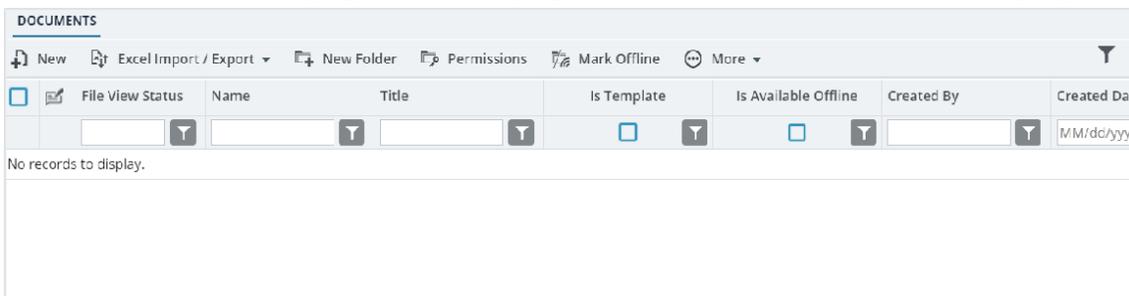


Figure 112: Documents List Page

2. Select a document to view all its annotated copies, and click **Annotations**.

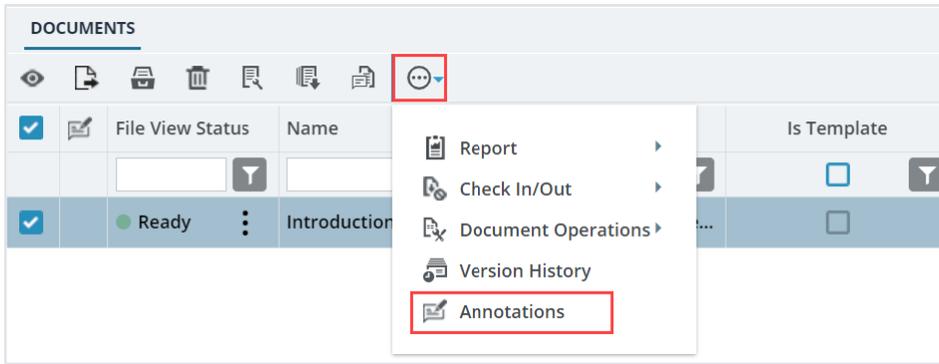


Figure 113: Annotations Option

The list of annotated copies of the current version of the file is displayed.

DOCUMENT ANNOTATION					
+ New ← Back ⋮ More ▾					
<input type="checkbox"/>	Annotation Name	Created By	Created On	Modified By	Modified On
	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/dd/yyyy h:mm tt"/>	<input type="text"/>	<input type="text" value="MM/dd/yyyy h:mm tt"/>
<input type="checkbox"/>	Mike_2024070403...	Mike	07/04/2024 3:34 AM	Mike	07/04/2024 3:34 AM
<input type="checkbox"/>	Mike_2024070403...	Mike	07/04/2024 3:23 AM	Mike	07/04/2024 3:23 AM

Figure 114: List Page of Annotations

3. Select an annotated file, and then click **View** to view the document.

DOCUMENT ANNOTATION					
✎ Edit View 🗑 Delete ➡ Consolidate ⓘ Information 1 Selected X					
<input type="checkbox"/>	Annotation Name	Created By	Created On	Modified By	Modified On
	<input type="text"/>	<input type="text"/>	<input type="text" value="MM/dd/yyyy h:mm tt"/>	<input type="text"/>	<input type="text" value="MM/dd/yyyy h:mm tt"/>
<input checked="" type="checkbox"/>	Mike_2024070403...	Mike	07/04/2024 3:34 AM	Mike	07/04/2024 3:34 AM
<input type="checkbox"/>	Mike_2024070403...	Mike	07/04/2024 3:23 AM	Mike	07/04/2024 3:23 AM

Figure 115: View Annotation

3.2.6.2.2. Accessing annotated copies of previous versions

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:

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

The **PROJECTS** list page is displayed.

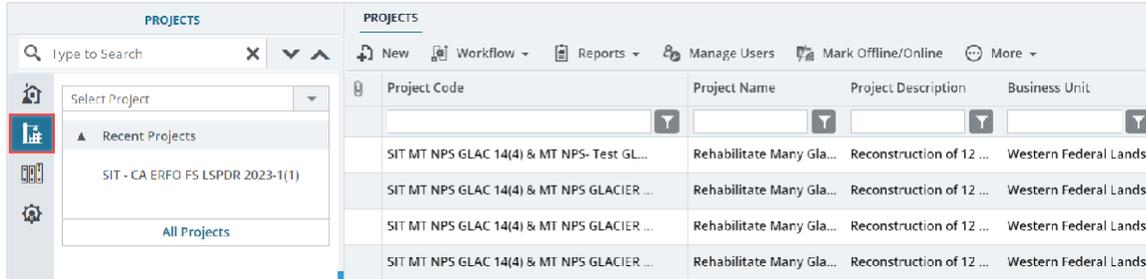


Figure 116: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

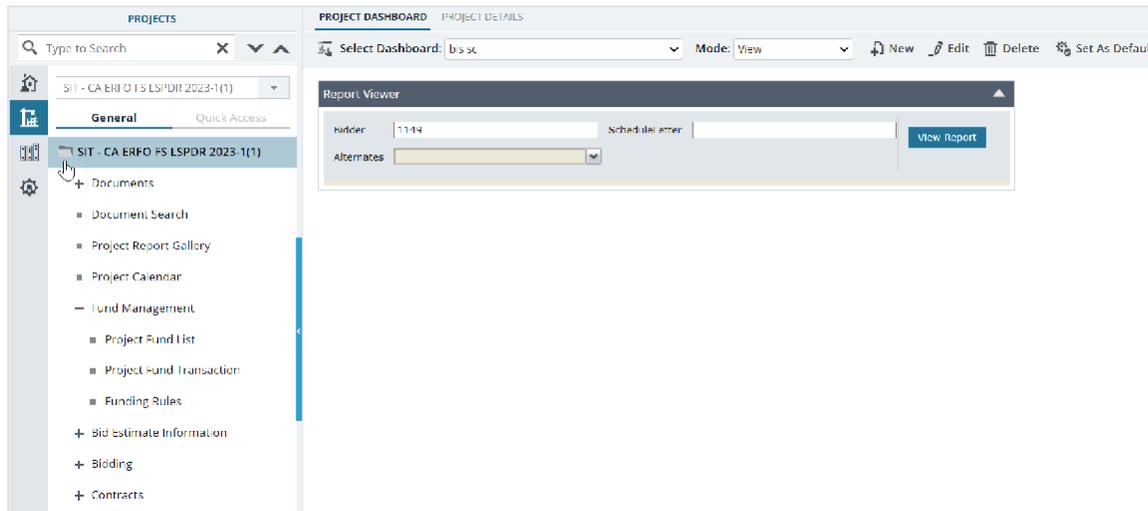


Figure 117: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

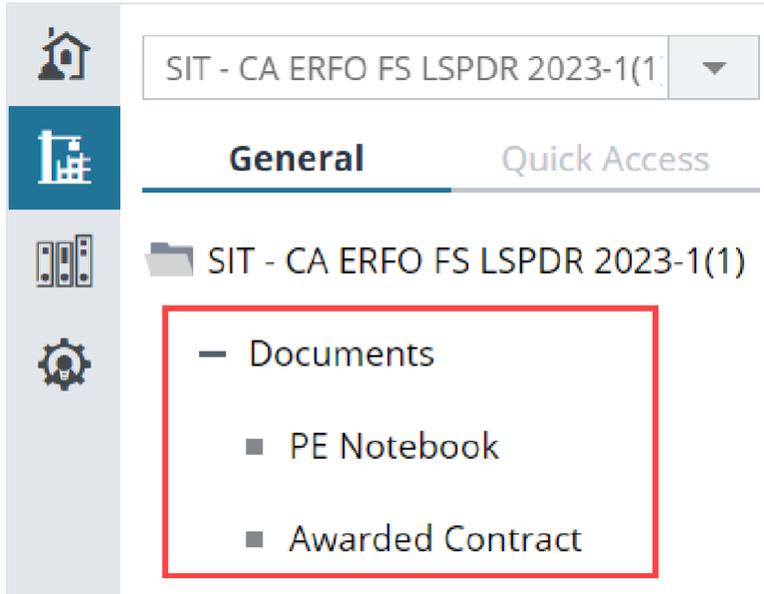


Figure 118: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

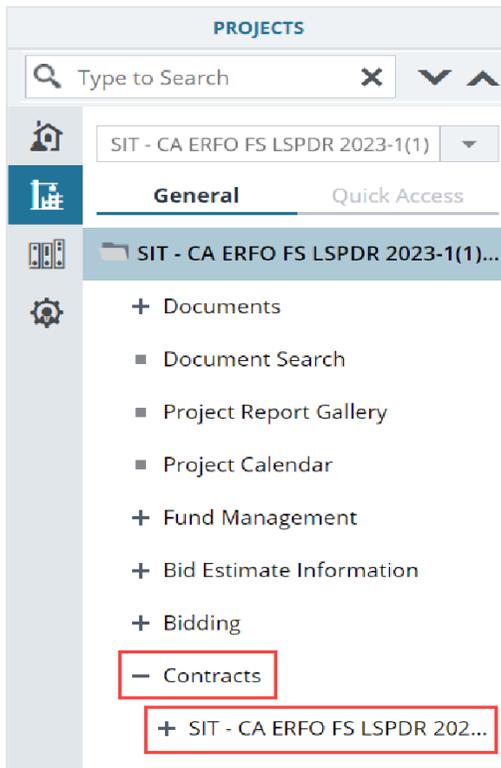


Figure 119: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

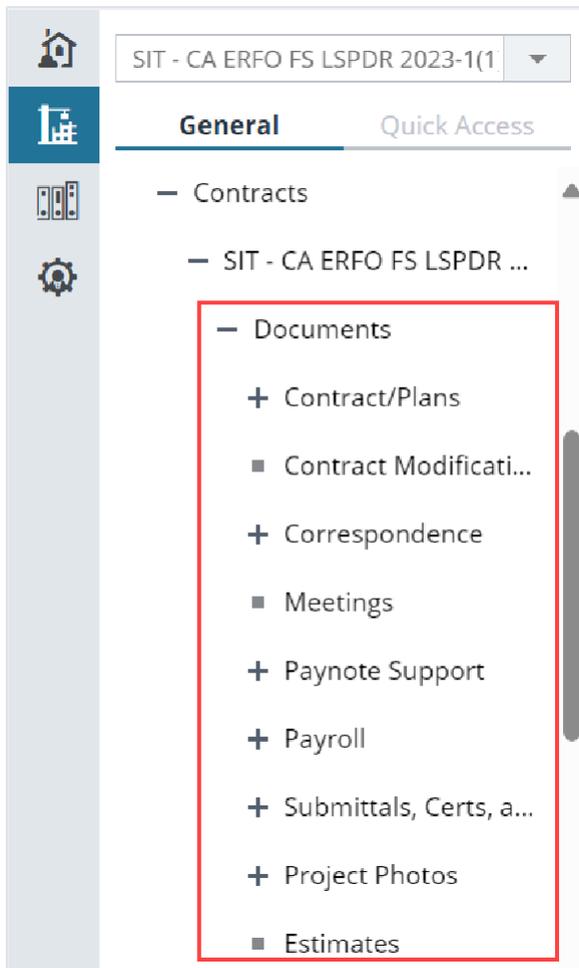


Figure 120: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

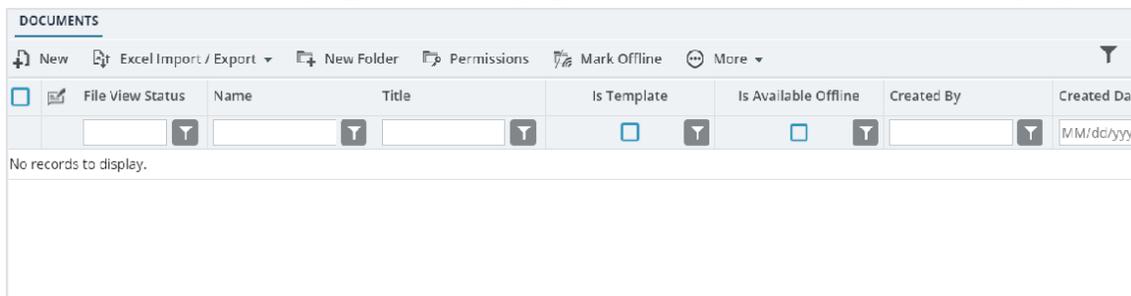


Figure 121: Documents List Page

2. Select a document to view annotated copies of its previous versions.

3. Click **More**, and then click **Version History**.

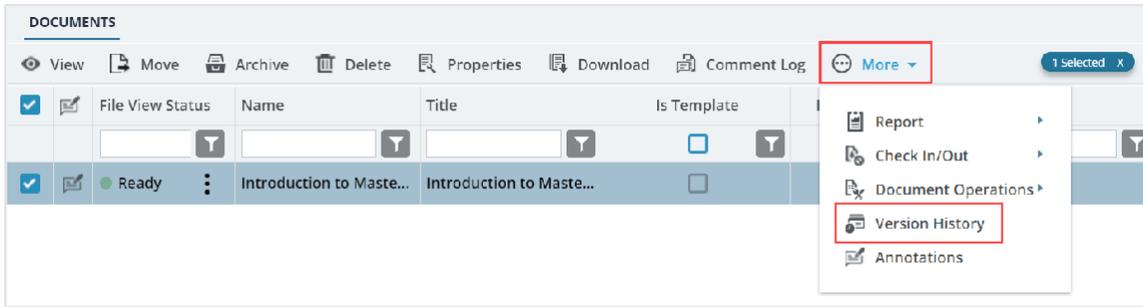


Figure 122: Version History Option

The **Version History** dialog box is displayed.

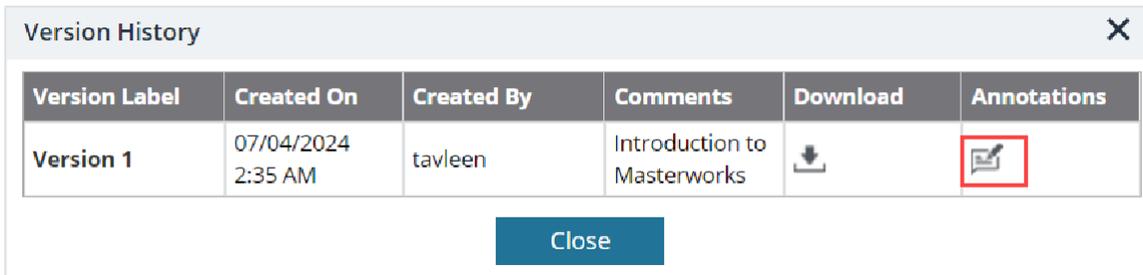


Figure 123: Version History Dialog Box

4. To view annotated copies of a document version, in the Annotation column corresponding to the appropriate document, click .

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

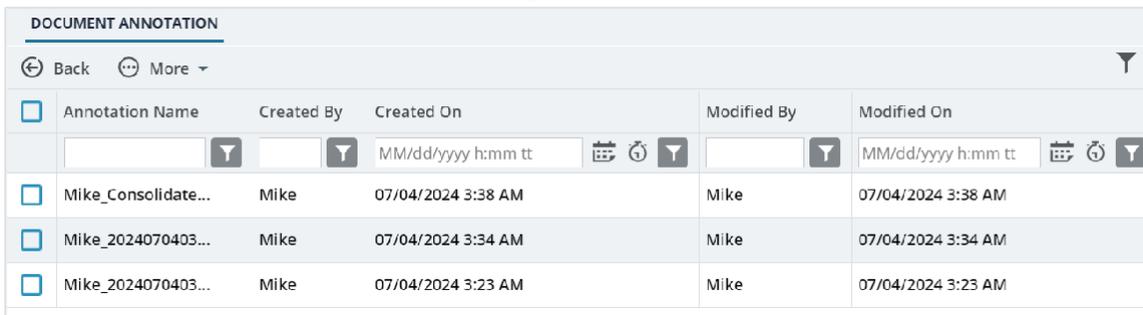


Figure 124: List Page of Annotations

5. Select an annotated file, and then click **View** to view the document.

3.2.6.3. Annotating Attachments

Overview

You can annotate files that are attached to forms.

The Project Fund List form is used as an example to demonstrate how to annotate an attachment.

Steps

1. In the project navigation pane, click the appropriate form.
2. Select the appropriate record, and then click **Edit**.

The screenshot shows the 'PROJECT FUND LIST' form. The top section contains several input fields: Account Number (15B6062301103.A40.CN.15F1.06.1), Account Priority (Select), Authorized Amount (\$), Original Authorized Amount (\$), Expended Amount (\$), Probable Expenditure (\$), and Remaining Amount (\$), all with values of 0.00. Below these is a 'Notes' field with text: 'Sites: 1, 2, 4, 5, 6, 8, 9, 13, 17. (Same acct now; however, ERFO will reimburse this Amount)'. The 'ATTACHMENTS' section is highlighted with a red box and contains a table with the following data:

File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size	GPS Latitude
<input type="checkbox"/>	Project Fund Transaction Approval Receipt.docx		Project Fund	Mike	07/04/2024 4:12 AM	13 KB	

Below the table are two buttons: 'Link Document' and 'Upload Document'.

Figure 125: Attachment Section in Project Fund List Form

3. To annotate an attachment, perform either of the following steps:
 - To annotate a document or image file, perform the following steps:
 - a. In the **ATTACHMENTS** section, in the **Document Name** column, click the appropriate attachment. The file is opened in the viewer. Alternatively, select the appropriate attachment, and then click in the toolbar. The **DOCUMENT ANNOTATION** list page is displayed.

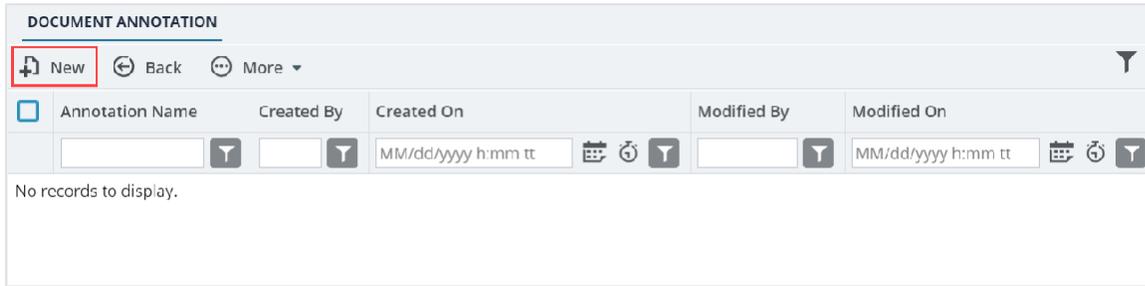


Figure 126: List Page of Annotations

- b. In the list page, click **New**.
- c. If the annotations toolbar is unavailable, then in the document viewer, click **Edit**, and then click **Enable Annotations**.

The various annotation options are displayed.

- d. Click the required annotation and add it to the document.

You can annotate documents using the various annotation options that are available.

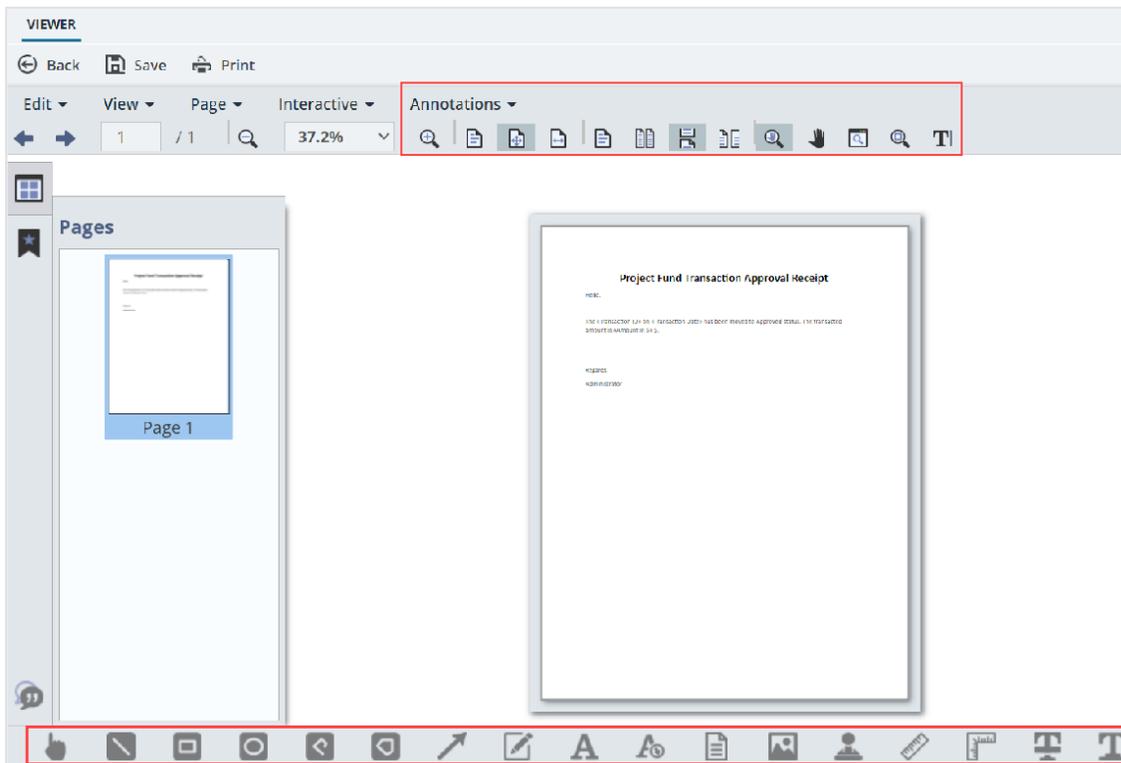


Figure 127: Annotation Options

- e. Click **Save**.

On saving the annotated document, a copy of the annotated document is saved with the timestamp of review and reviewer details.

- To annotate a drawing file, perform the following steps:
 - a. In the **ATTACHMENTS** section, select the appropriate drawing file.
 - b. Click  in the toolbar.

Note: The  button is not available if multiple drawing files are selected.

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

- c. Click **New**.

The file is opened in the viewer.

- d. Click the required annotation and add it to the document.

You can annotate documents using the various annotation options that are available.

- e. Click **Save**.

On saving the annotated document, a copy of the annotated document is saved with the timestamp of review and reviewer details.

3.2.6.4. Accessing Annotated Attachments

You can access all annotated copies of an attachment and all annotated copies of all versions of the attachment.

3.2.6.4.1. Accessing Annotated Copies of the Current Version

Steps

1. In the project navigation pane, click the appropriate form.
2. Select the appropriate record, and then click **Edit**.

PROJECT FUND LIST

Save & Exit Save & Continue Cancel Workflow Select Actions

Account Number : 15B6062301103.A40.CN.15F1.06.1

Account Priority : Select

Authorized Amount (\$) : 0.00

Original Authorized Amount (\$) : 0.00

Expended Amount (\$) : 0.00

Probable Expenditure (\$) : 0.00

Remaining Amount (\$) : 0.00

Notes : Sites: 1, 2, 4, 5, 6, 8, 9, 13, 17.
(Same acct now; however, ERFO will reimburse this Amount)

ATTACHMENTS

File View Status	Document Name	Url/Link	Title	Uploaded By	Uploaded Date	File Size	GPS Latitude
<input type="checkbox"/>	Project Fund Transaction Approval Receipt.docx		Project Fund	Mike	07/04/2024 4:12 AM	13 KB	

Link Document Upload Document

Figure 128: Attachment Section in Project Fund List Form

3. In the **ATTACHMENTS** section, select the appropriate document, and then click 
4. The list of annotated copies of the current version of the file is displayed.

DOCUMENT ANNOTATION

New Back More

Annotation Name	Created By	Created On	Modified By	Modified On
<input type="text"/>	<input type="text"/>	MM/dd/yyyy h:mm tt	<input type="text"/>	MM/dd/yyyy h:mm tt
<input type="checkbox"/> Mike_2024070403...	Mike	07/04/2024 3:34 AM	Mike	07/04/2024 3:34 AM
<input type="checkbox"/> Mike_2024070403...	Mike	07/04/2024 3:23 AM	Mike	07/04/2024 3:23 AM

Figure 129: List of Annotations

5. Select an annotated file, and then click **View**.

3.2.6.4.2. Accessing Annotated Copies of Previous Versions

Steps

1. In the project navigation pane, click the appropriate form.
2. Click **More**, and then click **Attachments**.

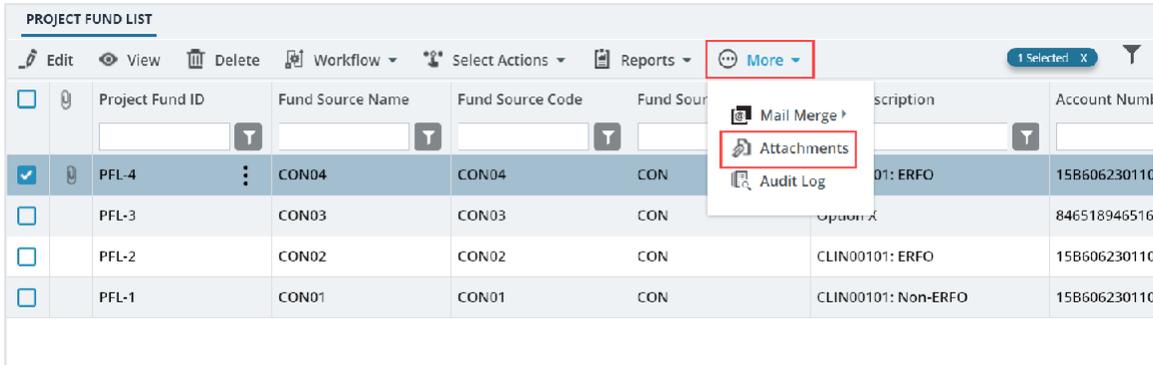


Figure 130: Attachment option

The list of all attachments is displayed.

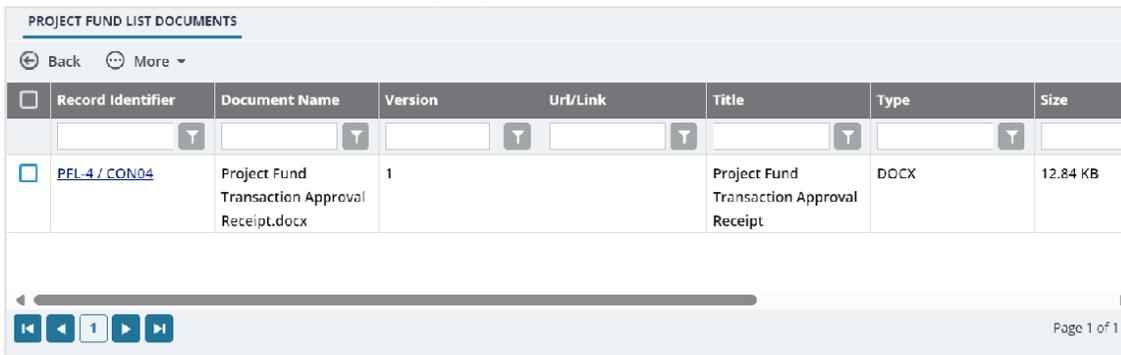


Figure 131: List of Documents

3. Click the appropriate file to view annotated copies of its previous versions, and click **Version History**.

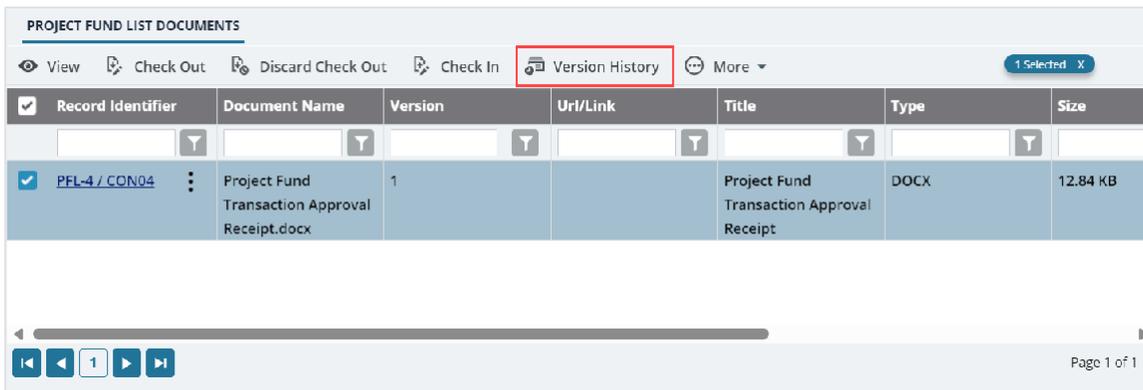


Figure 132: Version History Option

The **Version History** dialog box is displayed.

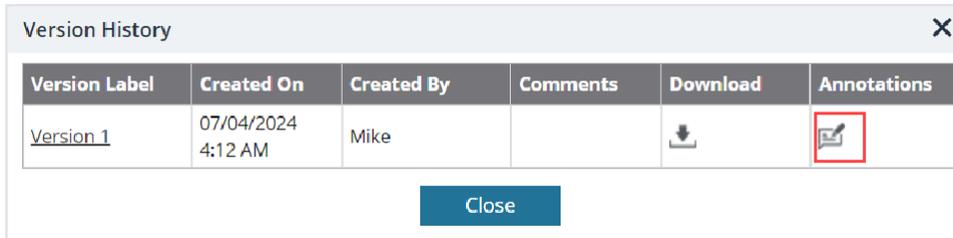


Figure 133: Version History Dialog Box

- To view annotated copies of a document version, in the Annotations column of the corresponding file, click .

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

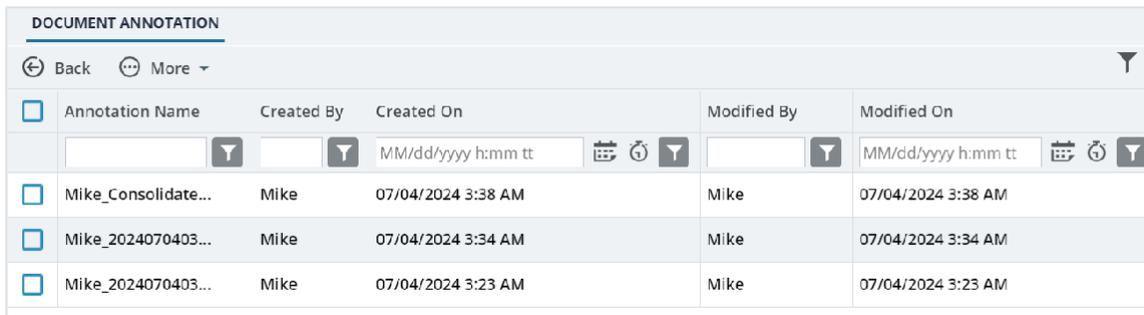


Figure 134: List Page of Annotations

- Select the appropriate annotated file, and then click **View**.

3.2.6.5. Consolidating Annotations

Prerequisites

- The latest version of the document is opened for editing.
- The file type of the document is not drawing.

Overview

In Masterworks, multiple stakeholders can review the document and provide comments using annotation. The owner of the document can create a consolidated document of annotations provided by multiple stakeholders.

Note: If the document's file type is mapped to a viewer supporting drawing files, then you cannot consolidate the annotations.

Steps

1. To access Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.
The **PROJECTS** list page is displayed.

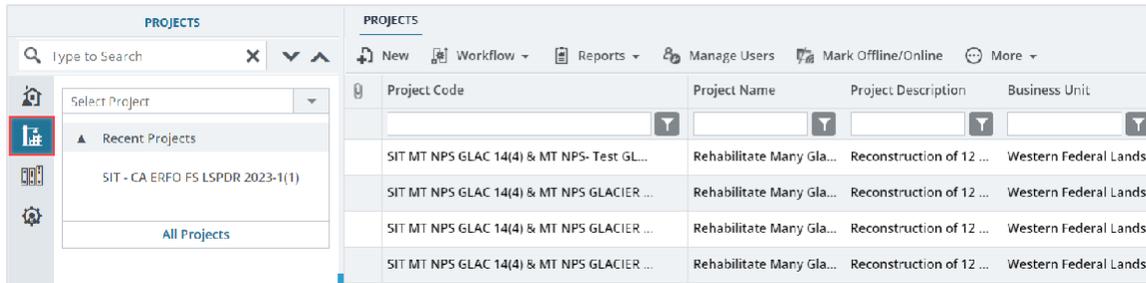


Figure 135: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

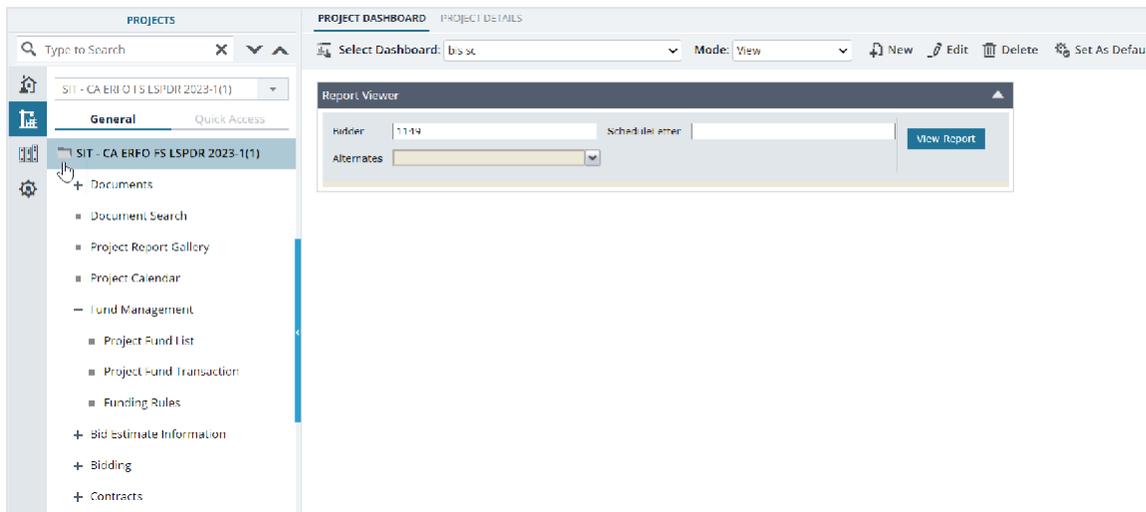


Figure 136: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

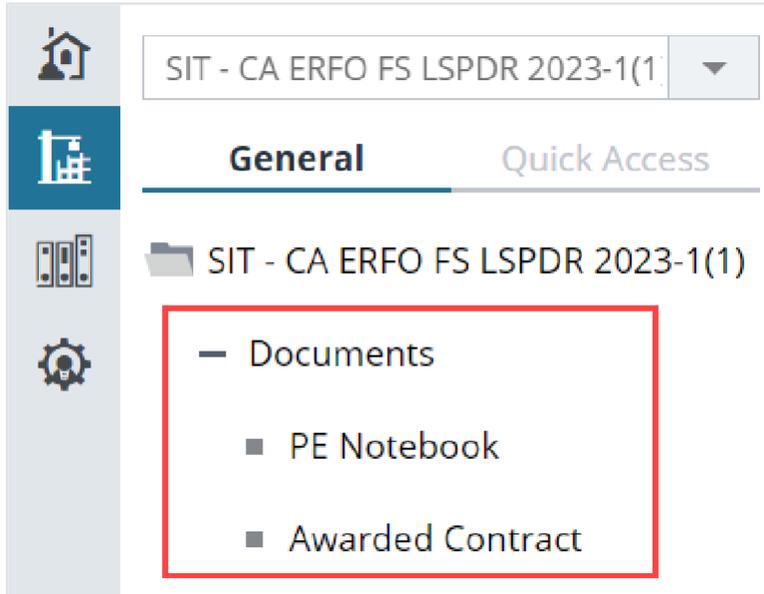


Figure 137: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.



Figure 138: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

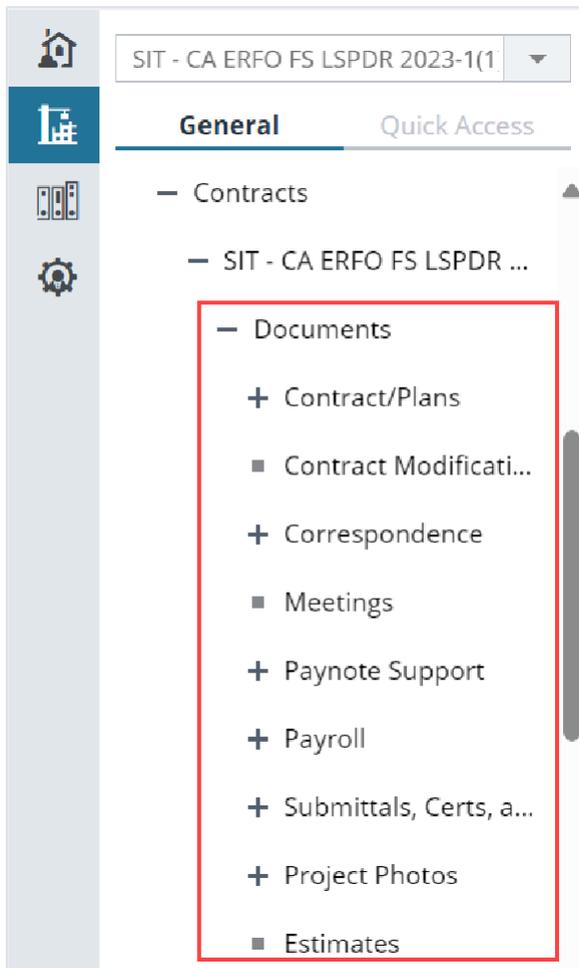


Figure 139: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

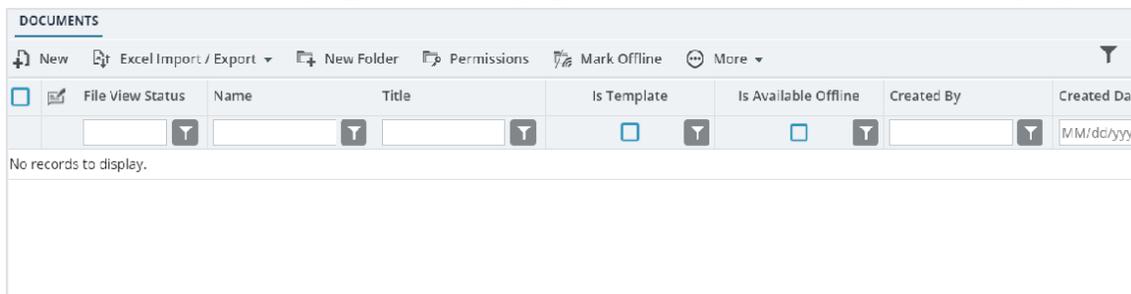


Figure 140: Documents List Page

2. Select a file to view all annotated copies of the file.

3. Click **More**, and then click **Annotations**.

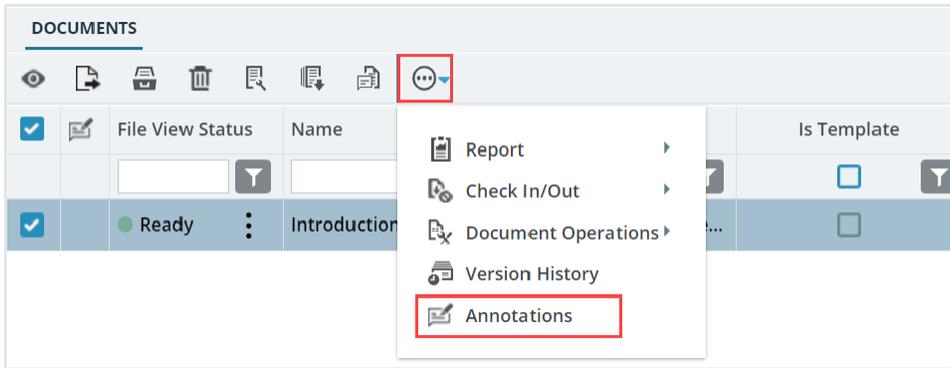


Figure 141: Annotations Option

The list of annotated copies of the current version of the file is displayed.

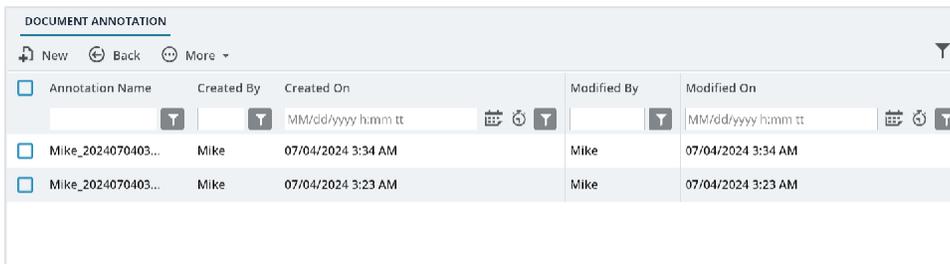


Figure 142: List Page of Annotations

4. Select two or more annotated files, and then click **Consolidate**.

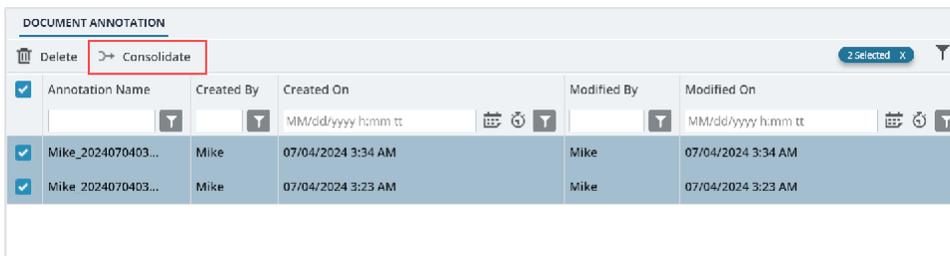


Figure 143: Consolidate Annotation

A new copy of the consolidated annotations is created in the **DOCUMENT ANNOTATION** list page.

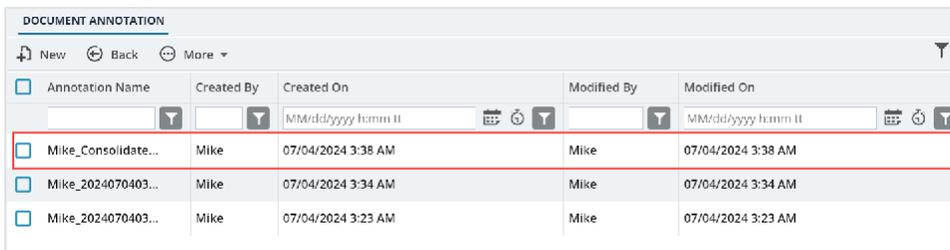


Figure 144: Consolidated Annotation Document

5. Select the newly created consolidated annotation and then click **View** to view the document. The consolidated document in the **VIEWER** page is displayed.

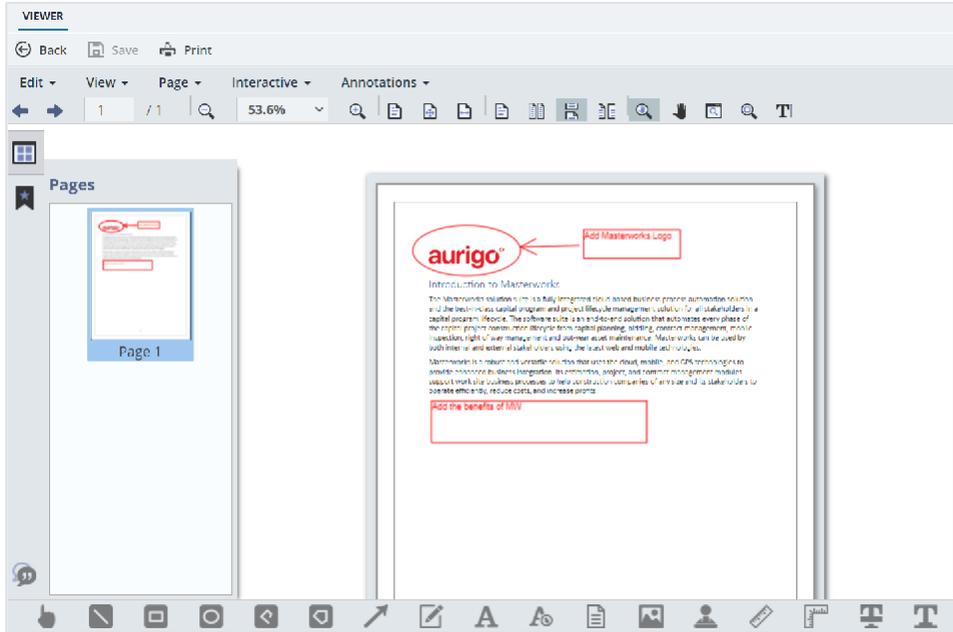


Figure 145: Viewer Page

3.2.6.6. Editing an Annotated File

Prerequisites

- The latest version of the document is opened for editing.
- The file type of the document is not drawing.

Overview

You can edit existing annotations, and delete annotations in an annotated file. You can edit or delete only annotations created by you. You can edit annotations only of the latest version of a document.

Note: If the document's file type is mapped to a viewer supporting drawing files, then you cannot edit or update the existing the annotations.

Steps

1. To access Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.
The **PROJECTS** list page is displayed.

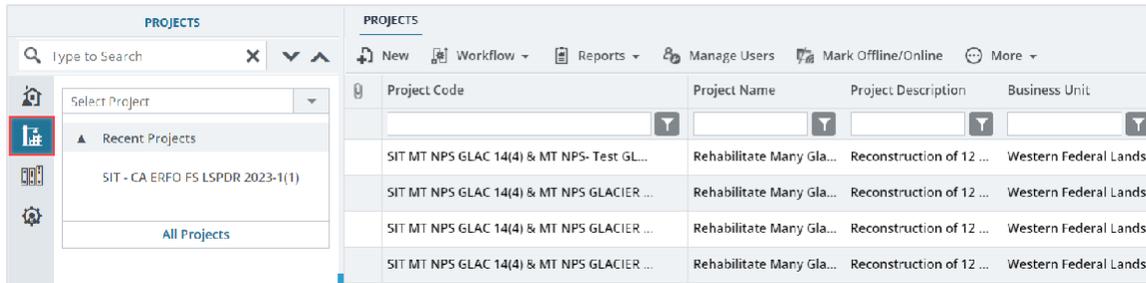


Figure 146: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

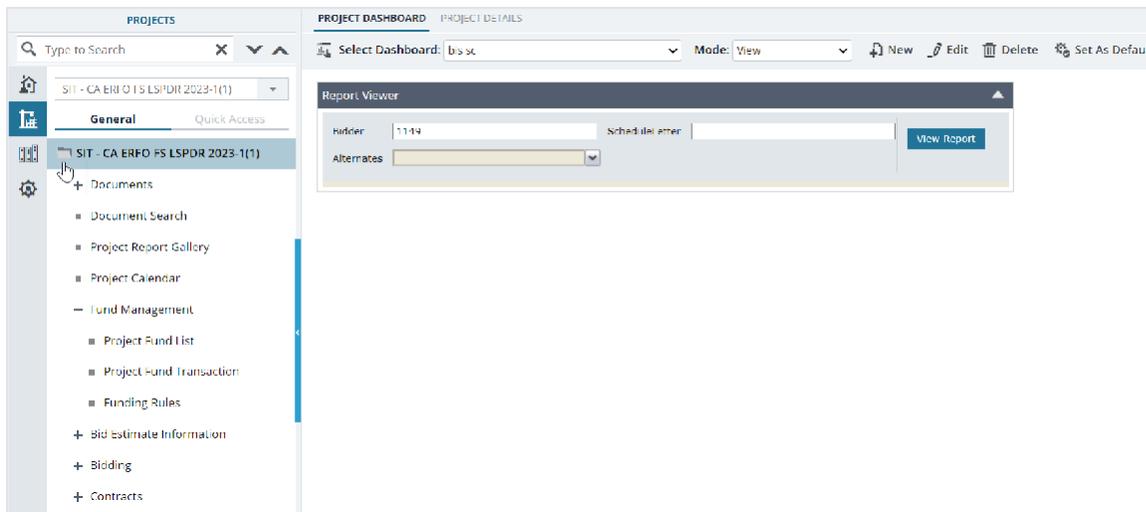


Figure 147: Expanding Projects Folder

- c. Perform either of the following steps, as applicable:
 - To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

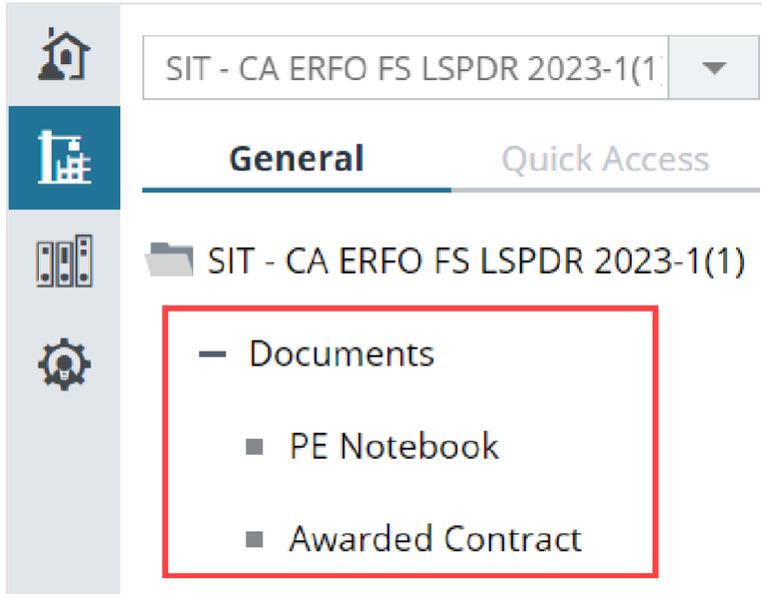


Figure 148: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

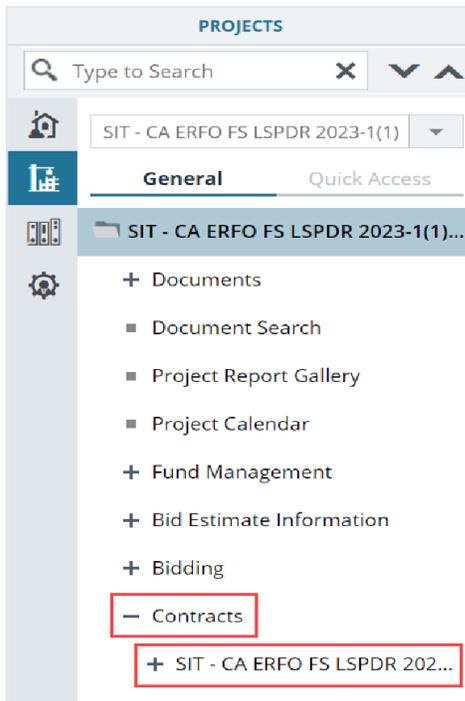


Figure 149: Expanding Contracts

- b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

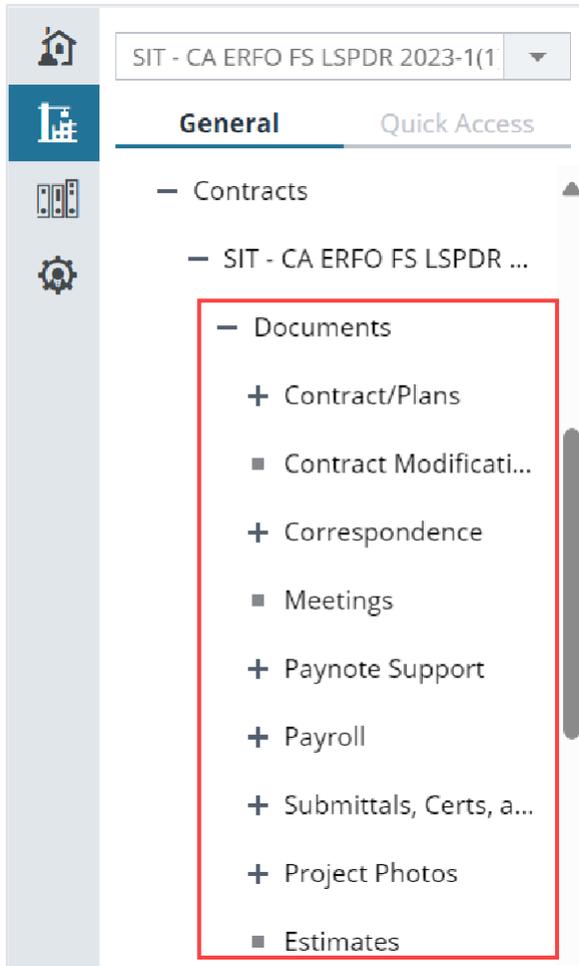


Figure 150: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

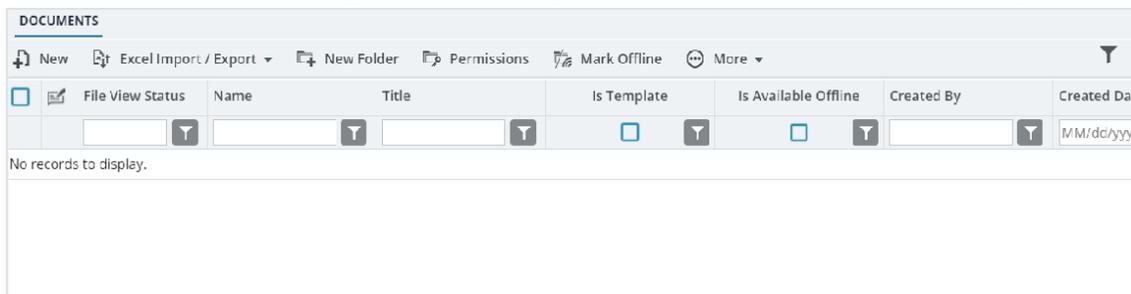


Figure 151: Documents List Page

2. Select the appropriate file to view all annotated copies of the file.

3. Click **More**, and then click **Annotations**.

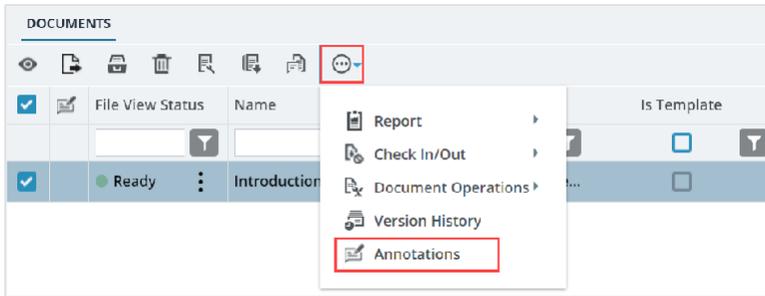


Figure 152: Annotations Option

The list of annotated copies of the current version of the file is displayed.

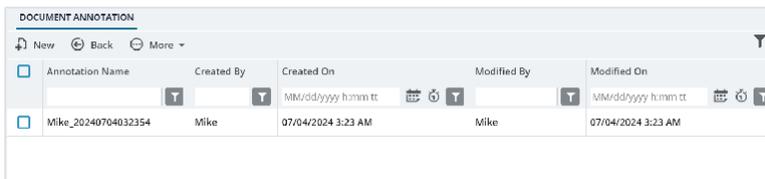


Figure 153: List Page of Annotations

4. Select the appropriate annotated file, and then click **Edit**.



Figure 154: Edit Annotated File

5. Perform any of the following steps:

- To add new annotations, perform the following steps:
 - a. If the annotations toolbar is unavailable, then in the document viewer, click **Edit**, and then click **Enable Annotations**.
The various annotation options are displayed.
 - b. Click the required annotation and drag the annotation on the opened file in the viewer.
 - c. Click **Save**.
- To delete annotations, click the appropriate annotation, and then press **Delete**, and then click **Save**.
- To edit annotations, click the appropriate annotation, drag any of the edit points, and then click **Save**.

3.2.6.7. Generating the Document Annotations Report

Overview

The Document Annotations Report provides a consolidated view of all the annotations made on a document, comments added to annotations, and responses to annotations.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

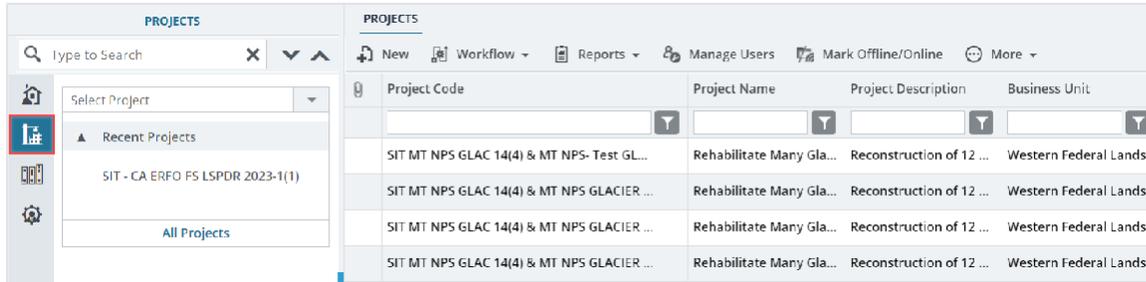


Figure 155: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

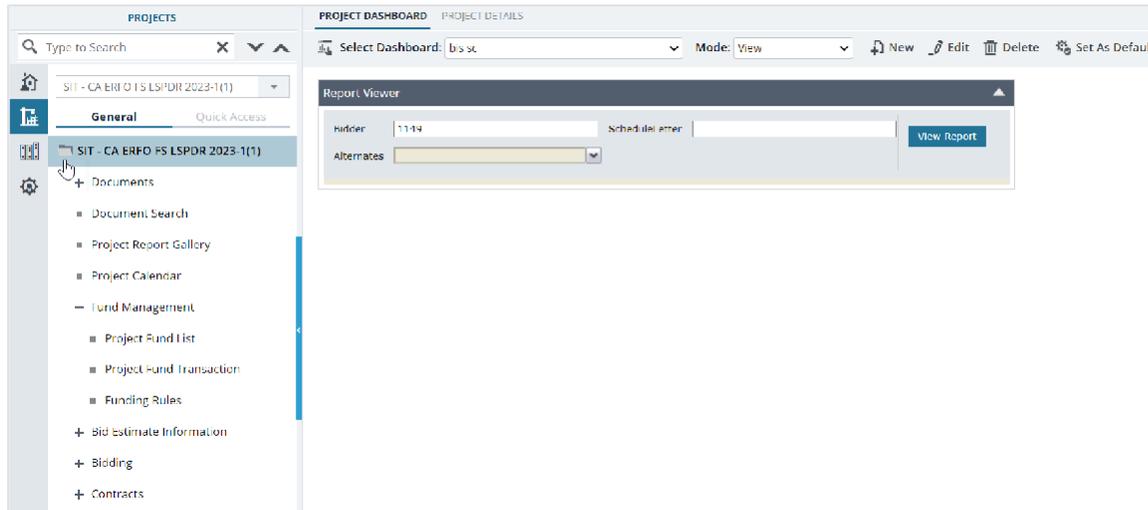


Figure 156: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

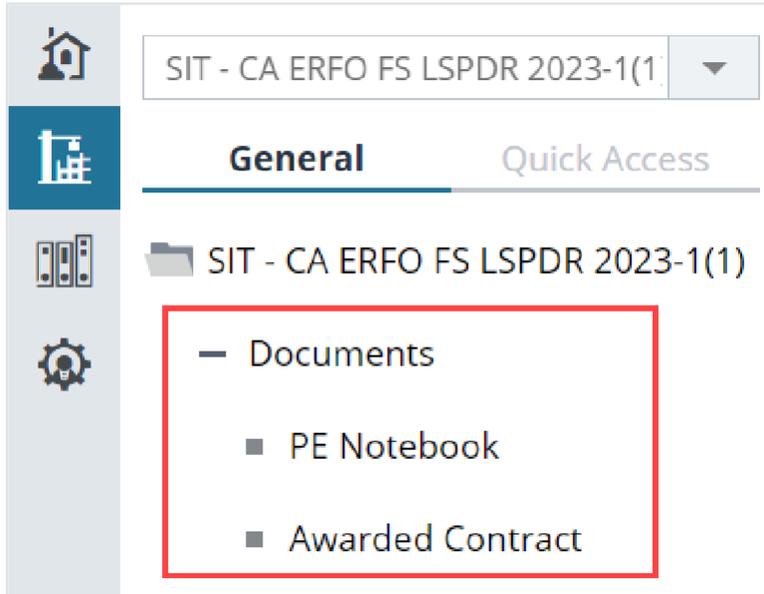


Figure 157: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

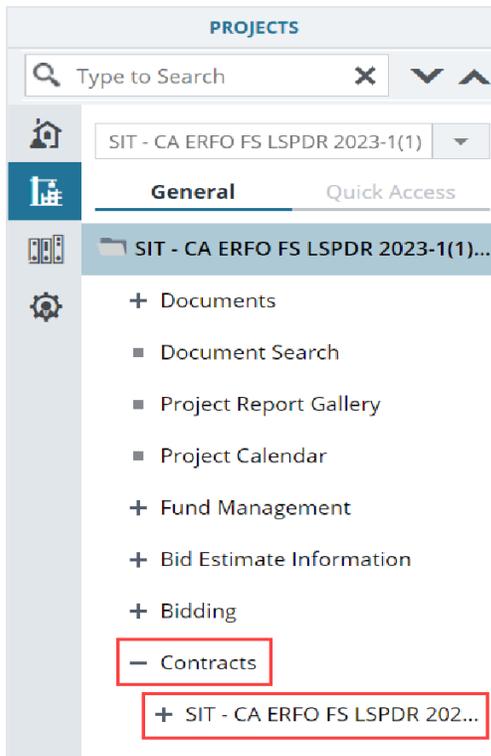


Figure 158: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

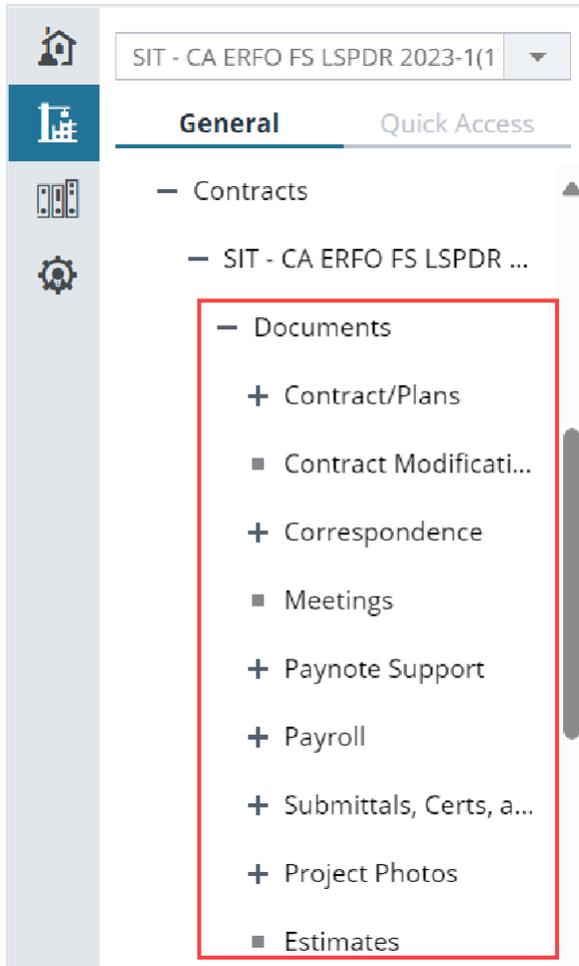


Figure 159: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

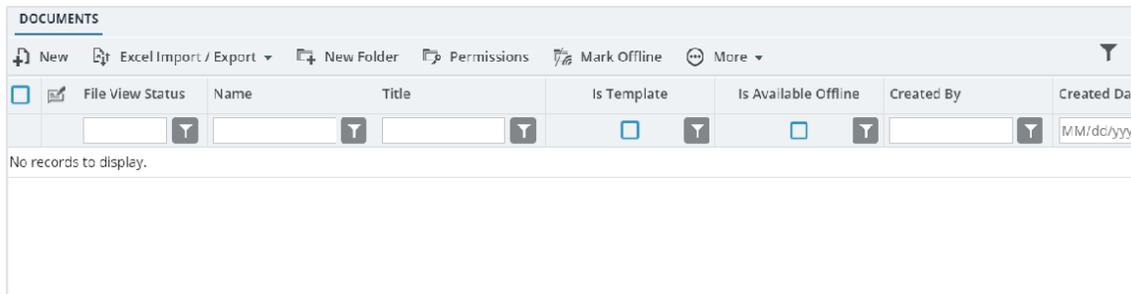


Figure 160: Documents List Page

2. Select the appropriate document, click **Report**, and then click **Document Annotation Report**.

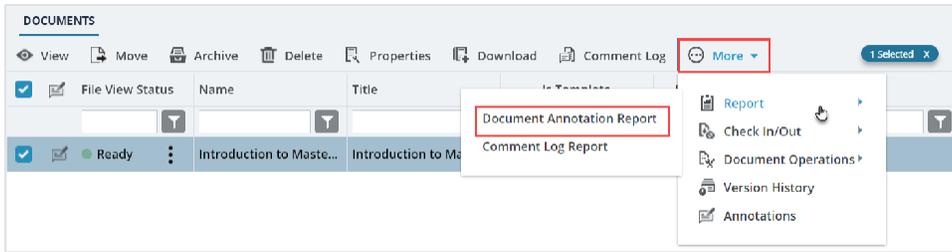


Figure 161: Document Annotation Report Option

The **DOCUMENT ANNOTATIONS REPORT** page is generated and displayed.

The screenshot shows the 'DOCUMENT ANNOTATIONS REPORT' page. It includes a 'Back' button, a 'Subscribe' button, and a search bar. The main content is a table with the following data:

Document Name	Introduction to Masterworks.docx	Document Title	Introduction to Masterworks								
Uploaded By	Mike	Uploaded Date	07/04/2024								
Version Number	Annotation Name	Created By	Created On	Page Number	Nature Of Annotation	Comment	Comment Added On	Responded By	Responded On	Response Status	Response Comment
1	Mike_20240704032354	Mike	07/04/2024	1	Text	Add the benefits of MW	07/04/2024				
	Mike_20240704033459	Mike	07/04/2024	1	Pointer		07/04/2024				
					Text	Add Masterworks Logo	07/04/2024				
					Ellipse		07/04/2024				
Mike_Const...	Mike	07/04/2024	1	Pointer		07/04/2024					

Figure 162: Document Annotations Report

For information on the various report features available, refer to Section [4.1. Standard Report Functions](#).

3.2.7. Moving a Document to a Different Folder

Prerequisites

- The role of the logged-in user must be one of the following:
 - Administrator
 - Design Component Lead
 - Lead Designer
 - Highway Design Manager
 - Project Manager
 - A/E Lead Designer
 - A/E Manager
 - Acquisitions
 - Construction Component Lead
 - Construction Admin Staff
 - Construction Engineer
 - Highway Construction Manager/QAQC
 - Construction Operations Engineer
 - Project Engineer
 - Regional Engineer
 - Assistant Project Engineer A&E
 - Project Engineer A&E

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).
- Document Properties of the source folder and the destination folder are the same.
For information on document properties, refer to Folder Management section.

Overview

You can move documents with ease to folders within the Masterworks document management system. Moving a document implies that the current version of the document is moved to the new folder location as is. The previous versions, properties, comments, annotations, and workflow status of the document are retained in the new folder location.

Note:

- On moving a document to a destination folder, the document will no longer be available in the source folder.
- Documents linked to the **ATTACHMENTS** section of a record can be moved to the destination folder, and the URL/Link is automatically updated in the record.

Steps

1. To access Documents folder at the project or contract level, perform the following steps:

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

The **PROJECTS** list page is displayed.

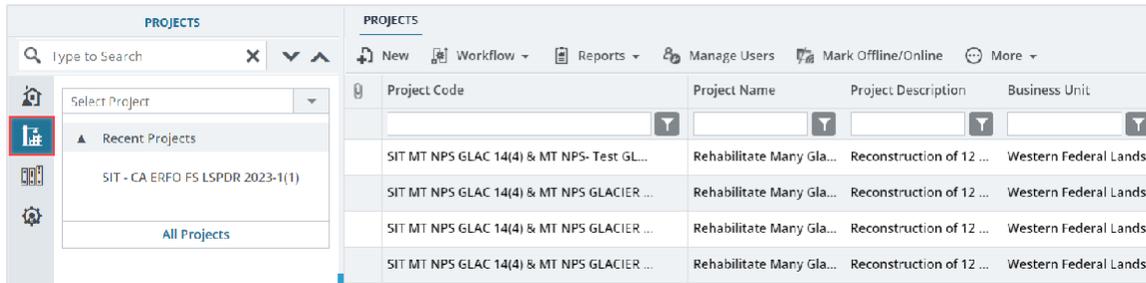


Figure 163: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

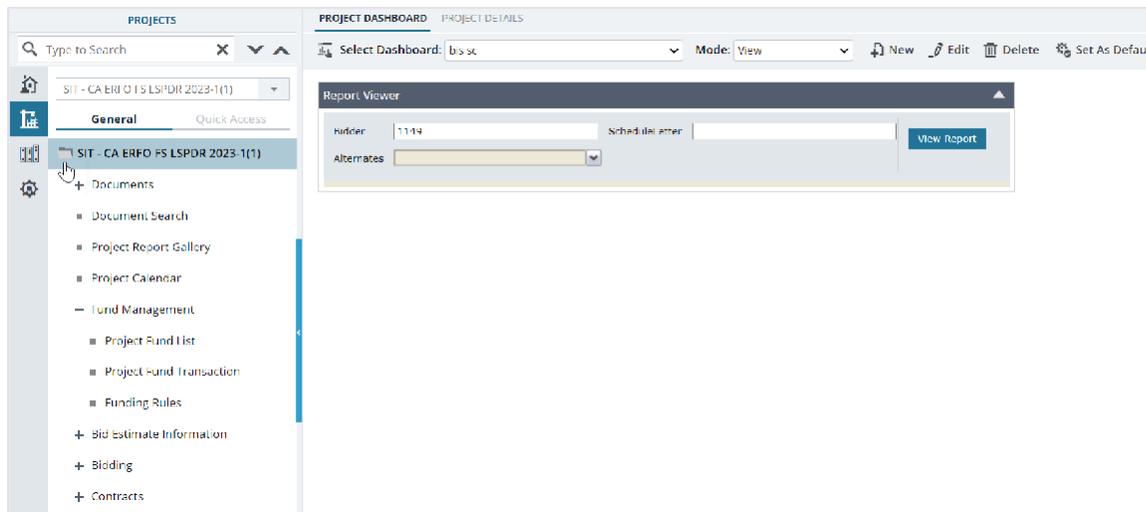


Figure 164: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

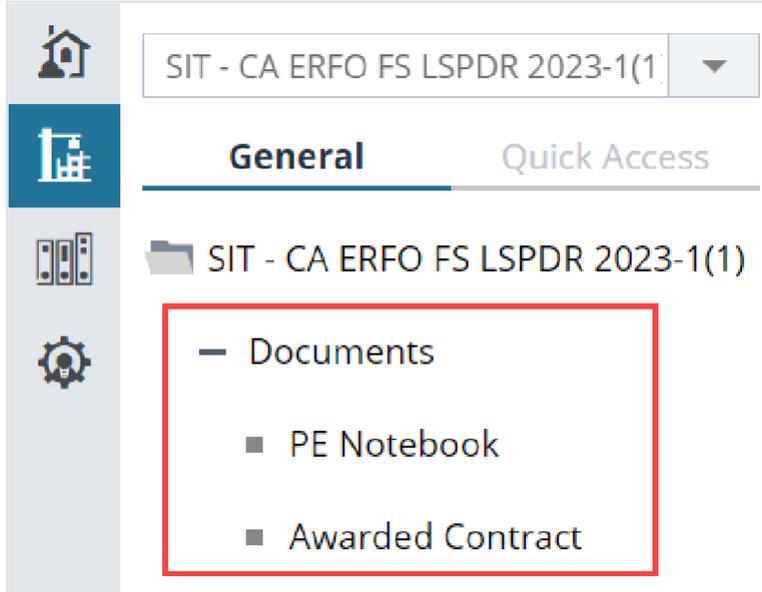


Figure 165: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - In the navigation pane, expand the **Contracts** folder, and then expand the contract.

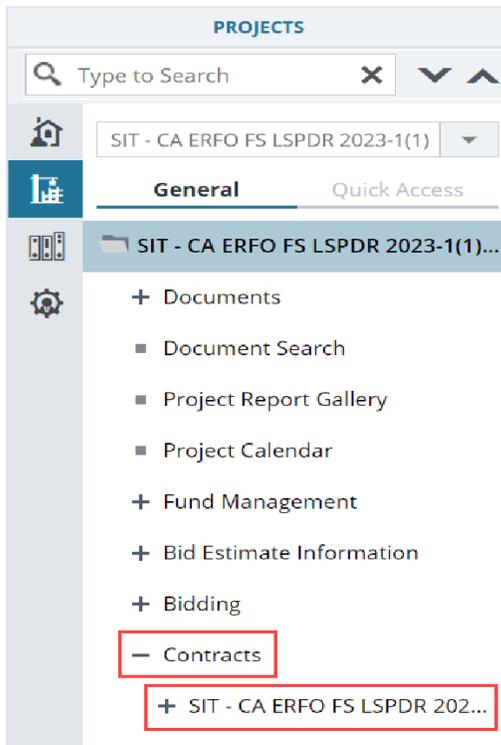


Figure 166: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

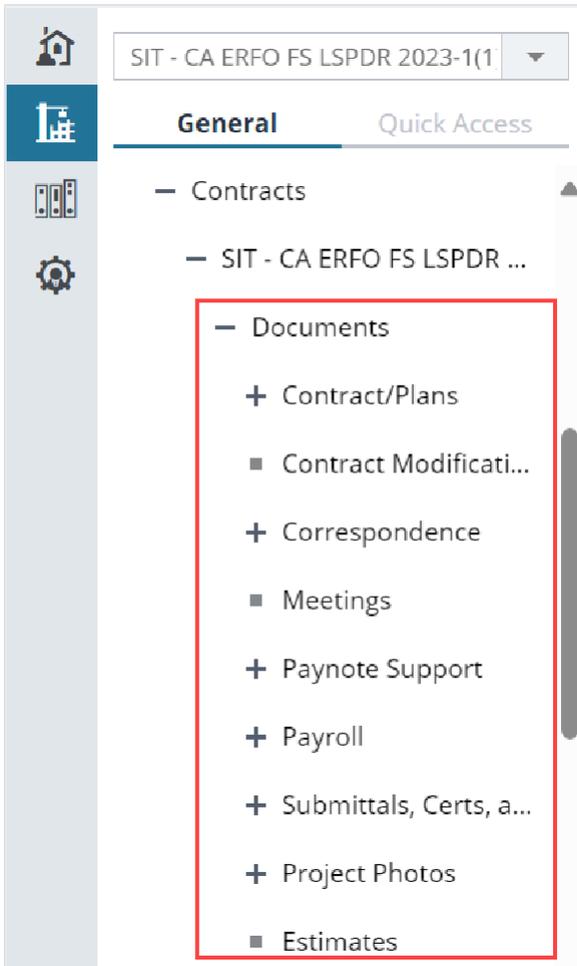


Figure 167: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

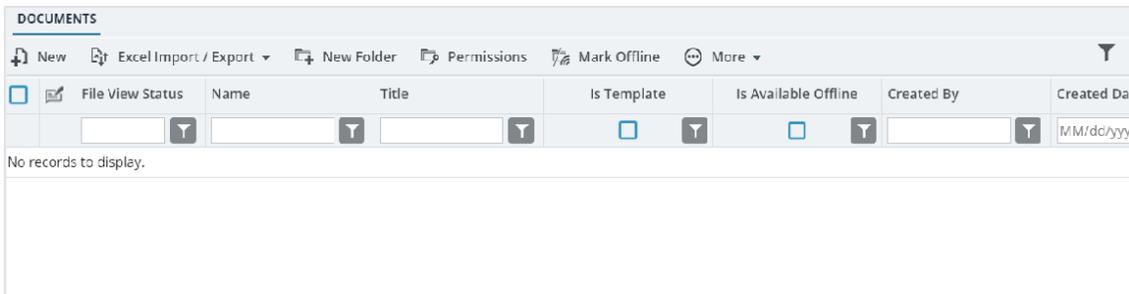


Figure 168: Documents List Page

2. In the list page, select the appropriate documents, and click **Move**.

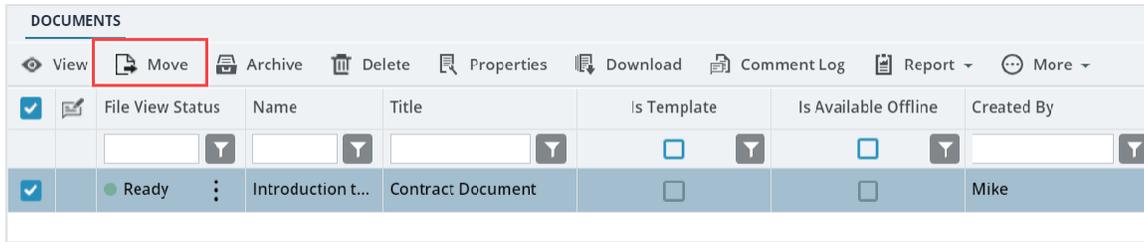


Figure 169: Move Option

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

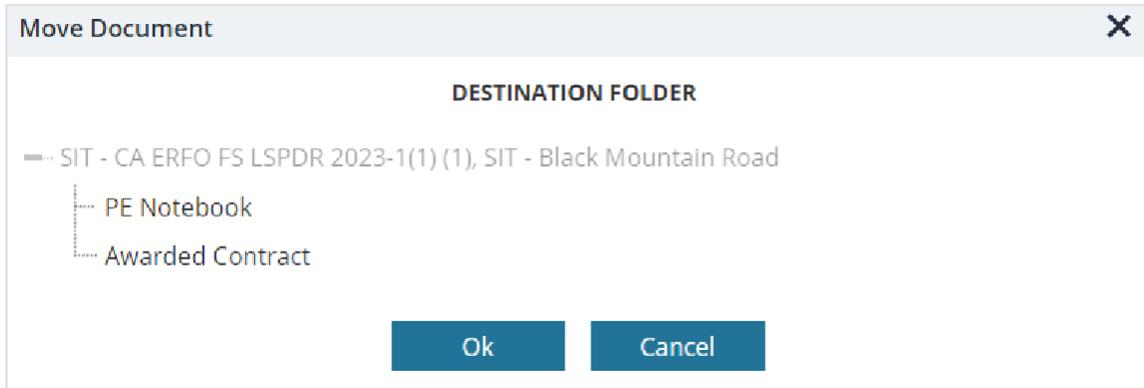


Figure 170: Move Document Dialog Box

Available folders are folders for which you have **Create** permissions, and the **Document Properties** of the folders are the same.

3. Click the folder to which the documents must be moved.
4. Click **OK**.

The selected files are moved to the selected folder.

3.2.8. Archiving a Document

Prerequisites

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

- Administrator
- Design Component Lead
- Lead Designer
- Highway Design Manager
- Project Manager
- Acquisitions
- Construction Component Lead
- Construction Admin Staff
- Construction Engineer
- Highway Construction Manager/QAQC

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

For more information on role-specific permissions, refer to [Document Management Permission Matrix](#).

Overview

You can archive documents to an automatically created **Archive** folder when you no longer require the documents in a particular folder.

The **Archive** folder is automatically created the first time the **Archive** functionality is used. On archiving a document, the document is moved to the Archive folder. However, you can still search for archived documents using the **Document Search** feature.

Note: Documents linked to the **ATTACHMENTS** section of a form cannot be archived.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

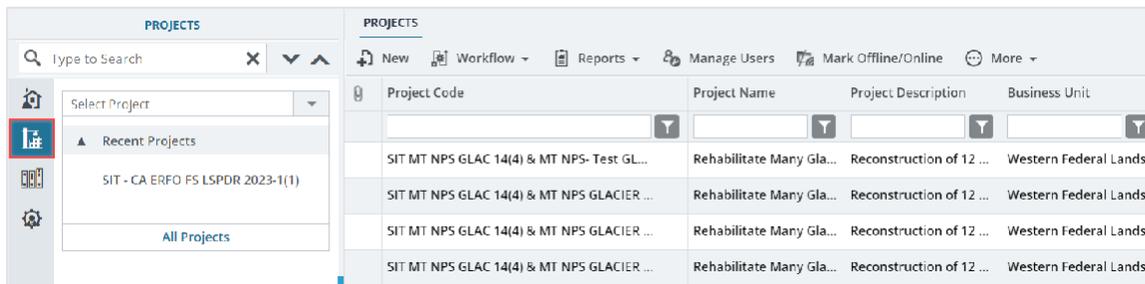


Figure 171: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

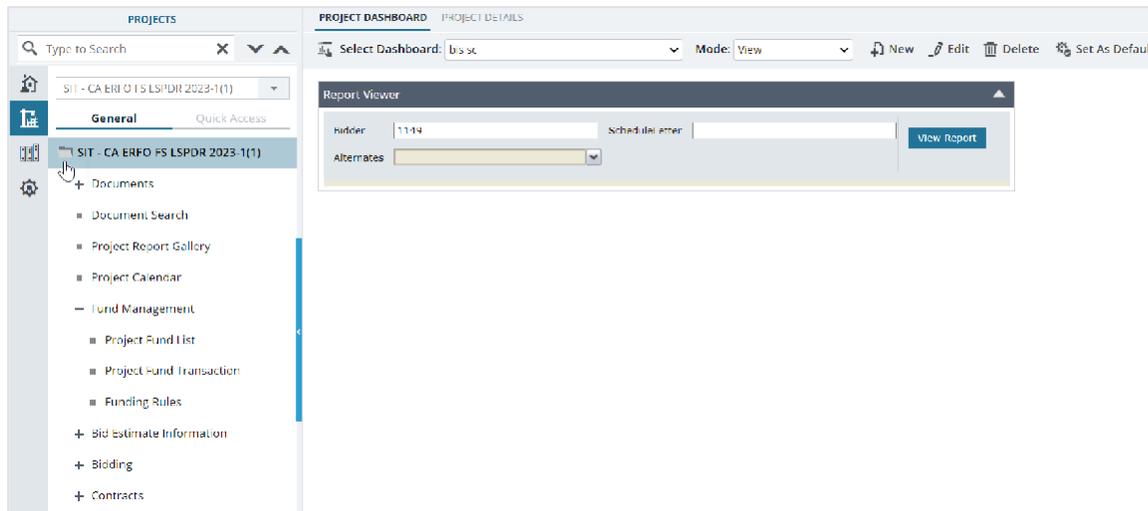


Figure 172: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

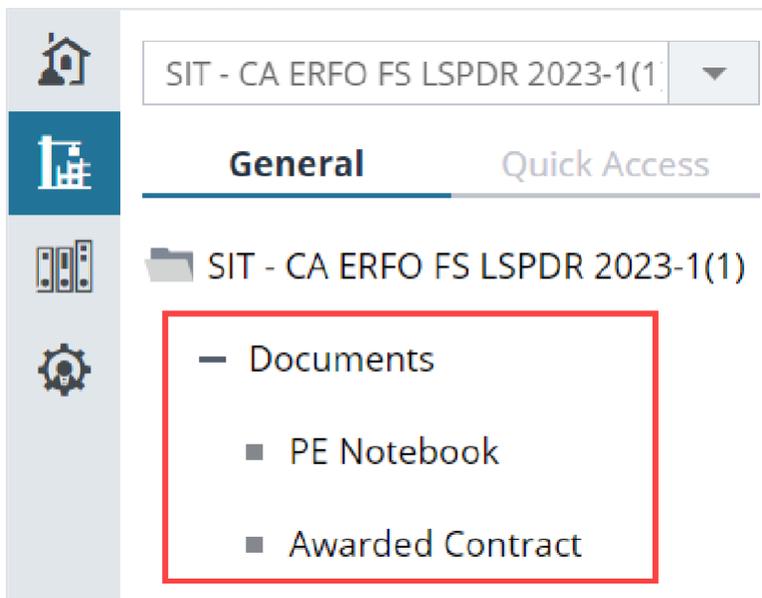


Figure 173: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

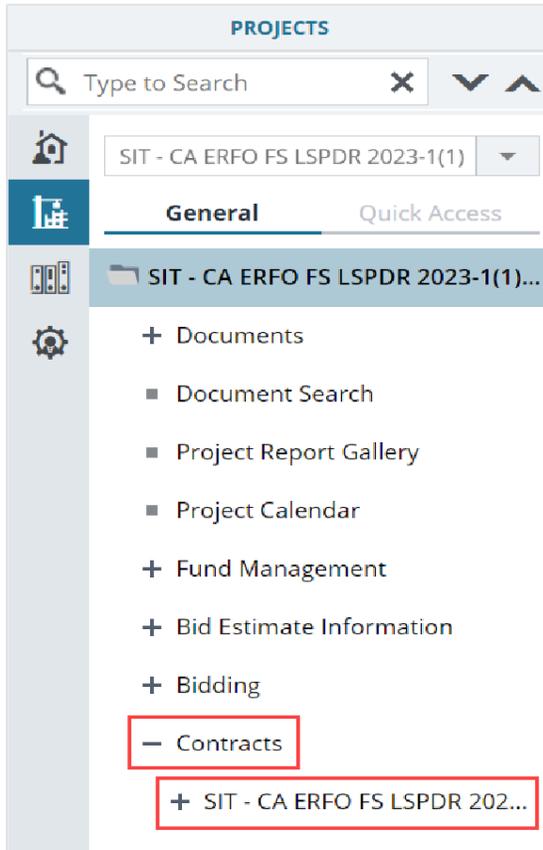


Figure 174: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

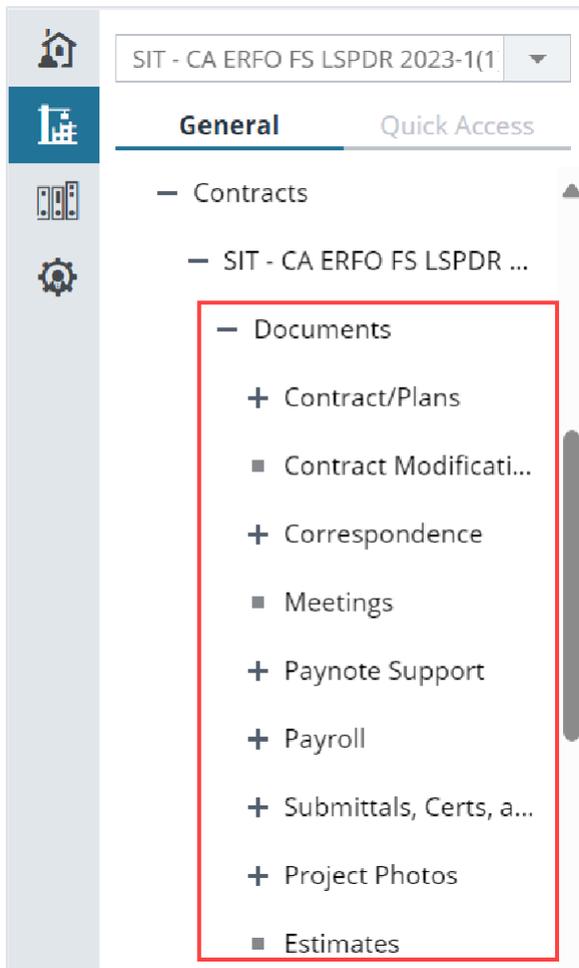


Figure 175: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

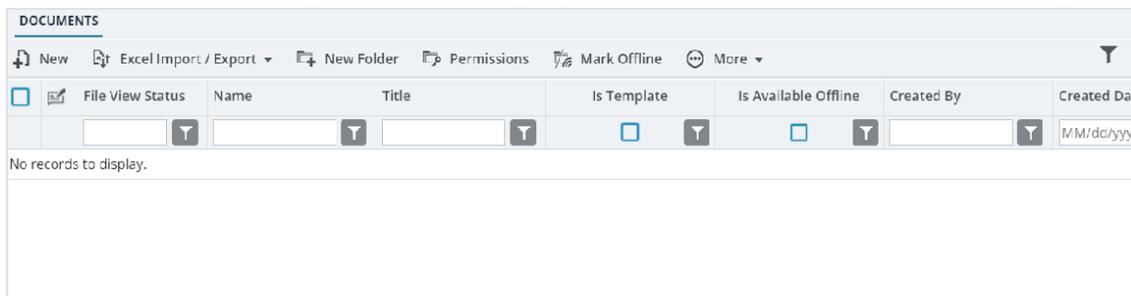


Figure 176: Documents List Page

2. Select the appropriate documents, and click **Archive**.

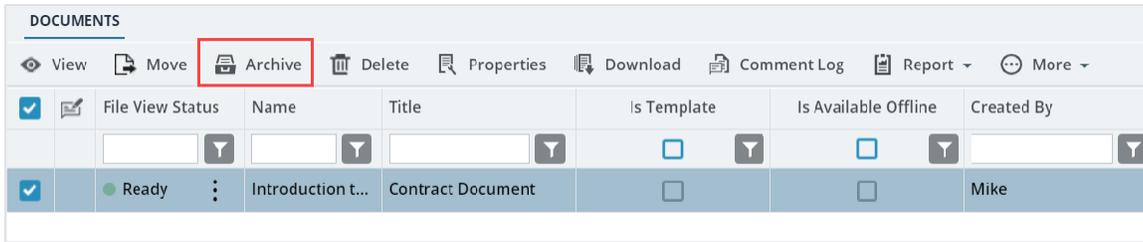


Figure 177: Archive Option

The selected documents are moved to the **Archive** folder.

Note: The **Archive** folder is automatically created the first time the Archive functionality is used.

3.2.9. Editing Document Properties

Overview

The **Document Properties** page enables you to perform the following tasks:

- Update document properties
- Associate a workflow to the document
- Copy to the clipboard the link to download the document

Note: Document properties displayed are based on the document properties template selected for the project.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

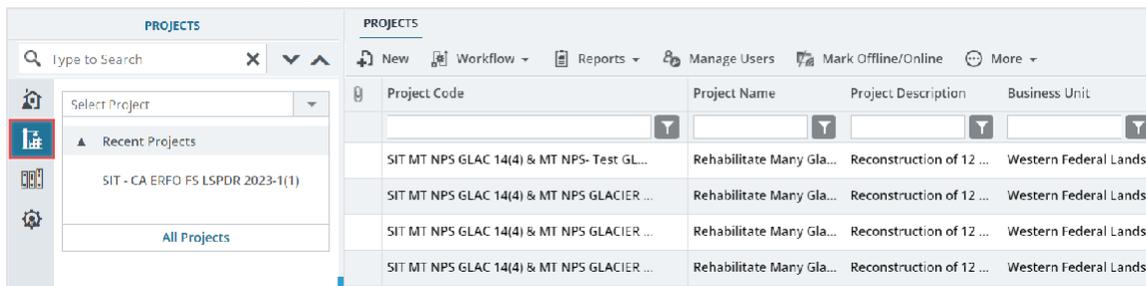


Figure 178: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

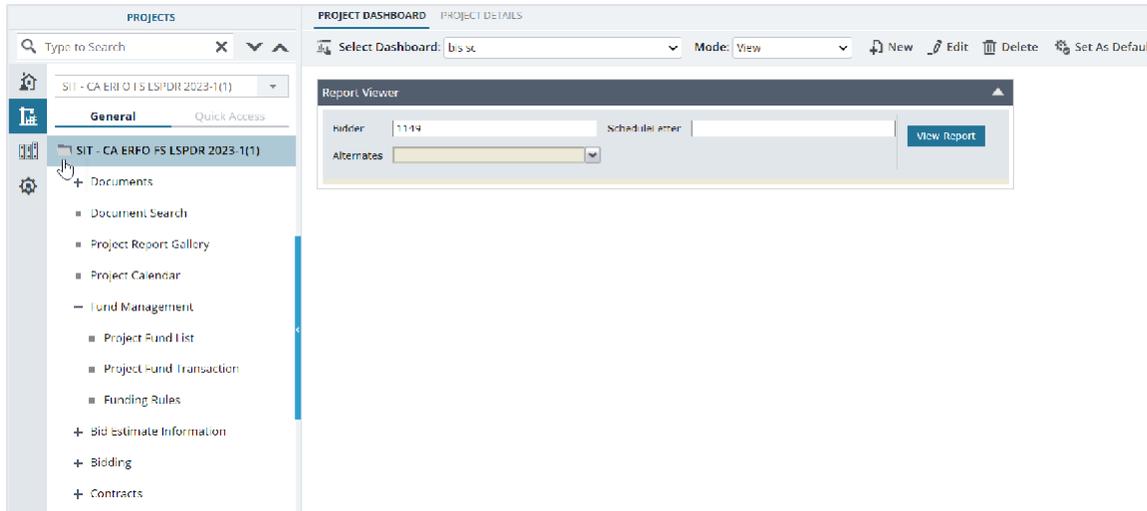


Figure 179: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

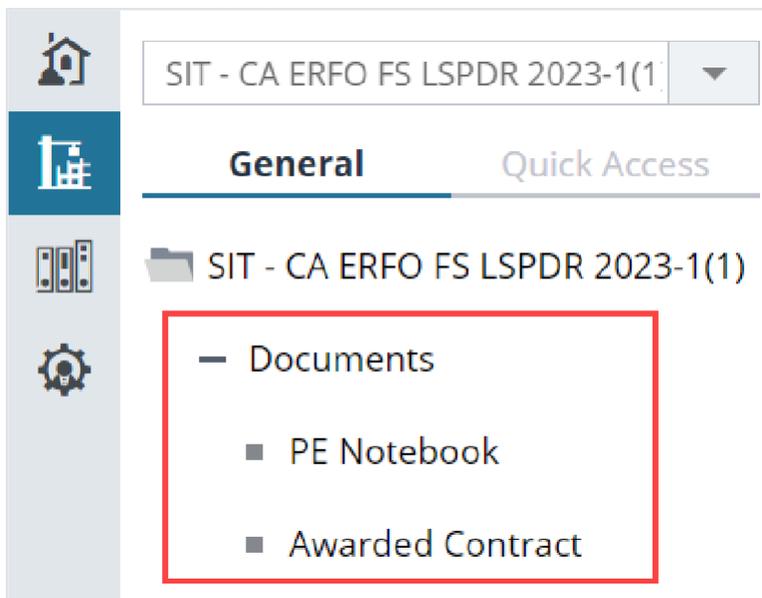


Figure 180: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

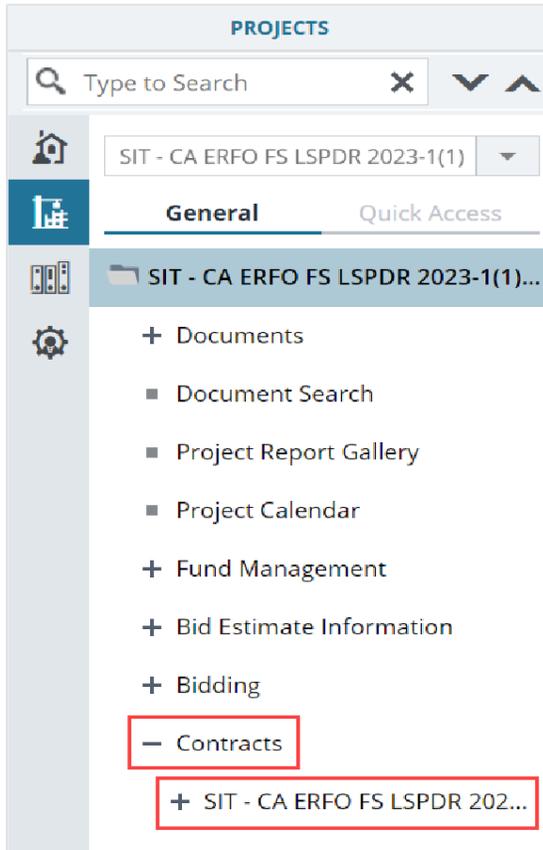


Figure 181: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

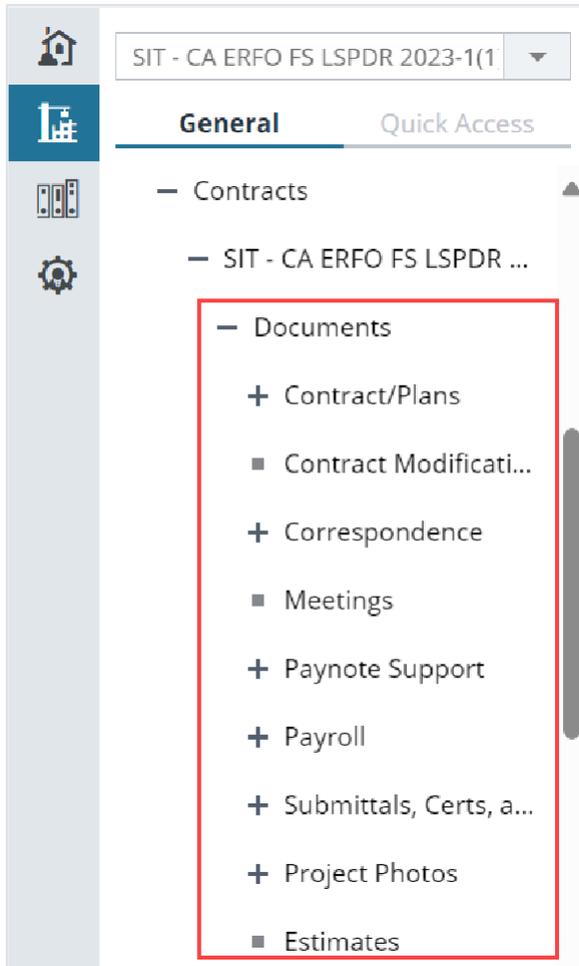


Figure 182: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

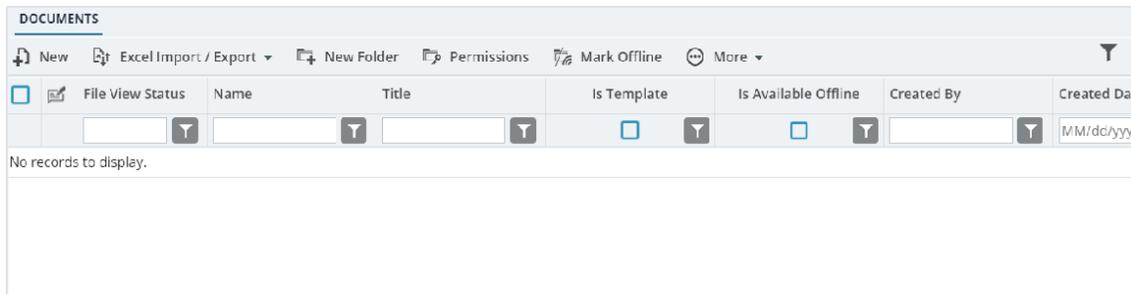


Figure 183: Documents List Page

2. In the documents list page, select the appropriate document, and click **Properties**.

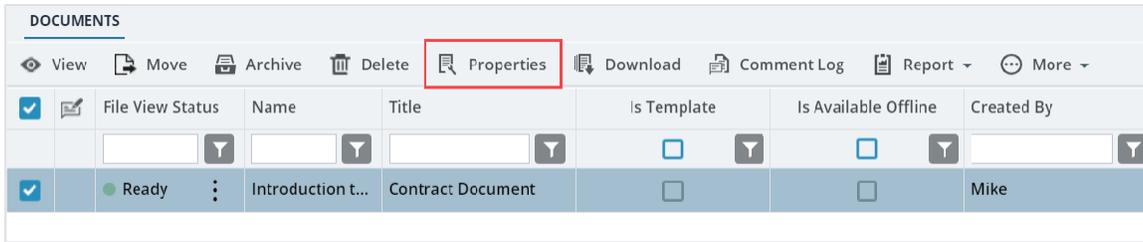


Figure 184: Properties Option

The **VIEW PROPERTIES** page is displayed.

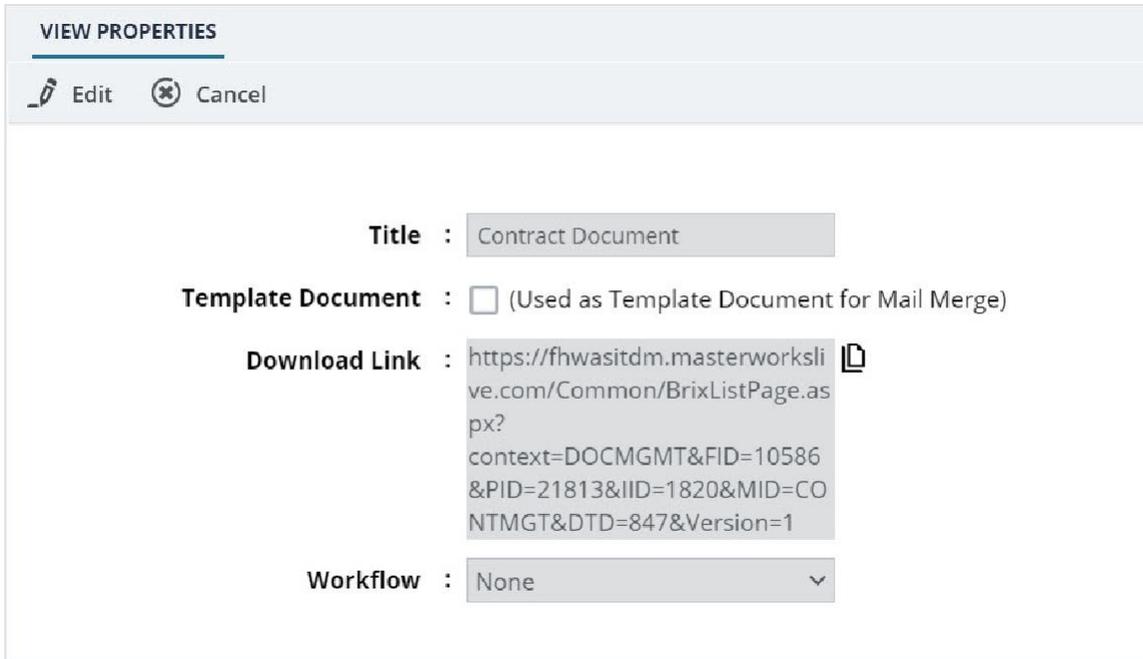
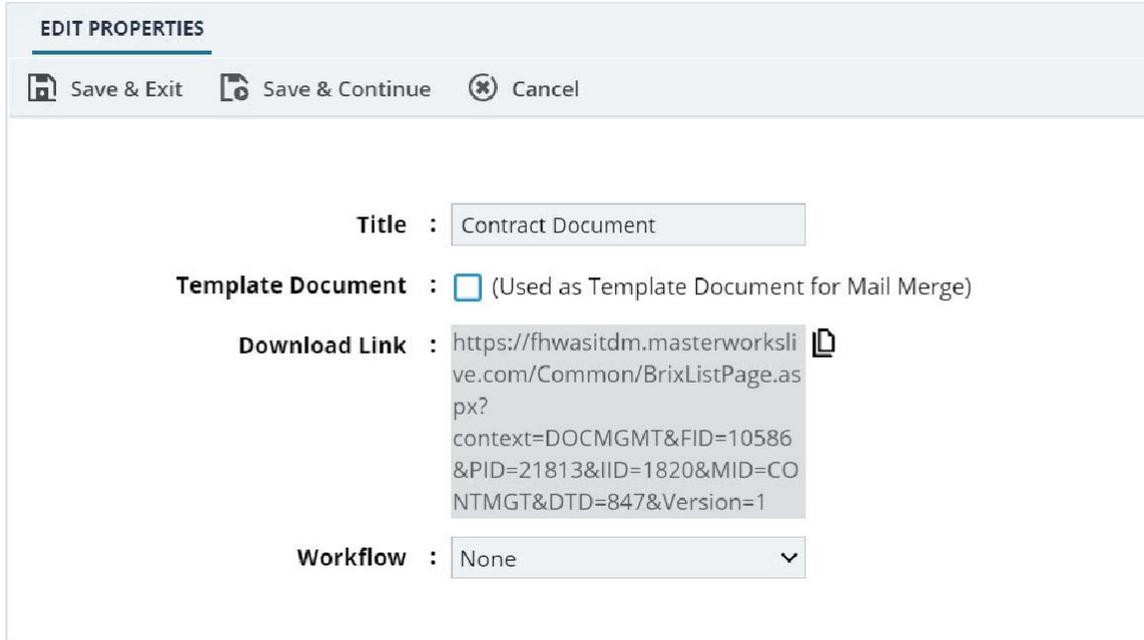


Figure 185: View Properties Page

The information available in the **VIEW PROPERTIES** page is based on the document properties template selected for the project.

3. Click **Edit**.

The **EDIT PROPERTIES** page is displayed.



The screenshot shows the 'EDIT PROPERTIES' page with a header bar containing three buttons: 'Save & Exit', 'Save & Continue', and 'Cancel'. Below the header, there are four fields:

- Title :** A text input field containing 'Contract Document'.
- Template Document :** A checkbox that is unchecked, followed by the text '(Used as Template Document for Mail Merge)'. The checkbox is currently empty.
- Download Link :** A text input field containing a long URL: `https://fhwasitdm.masterworksli
ve.com/Common/BrixListPage.as
px?
context=DOCMGMT&FID=10586
&PID=21813&IID=1820&MID=CO
NTMGT&DTD=847&Version=1`. To the right of the text is a copy icon.
- Workflow :** A dropdown menu with 'None' selected and a downward arrow.

Figure 186: Edit Properties Page

4. Make the appropriate changes.
5. To copy the link to download the document, corresponding to **Download Link** box, click , and then click **OK**.
6. From the **Workflow** list, select the appropriate workflow to receive approvals from the stakeholder hierarchy.
7. Click **Save & Exit** to save the record and return to the list page. Optionally, click **Save & Continue** to save the record and continue on the same page. Click **Cancel** to discard the added information and exit the page.

3.2.10. Comment Log

The **Comment Log** is a repository of comments posted on a document. Multiple users can post comments on a document, and record responses on the comments that are posted. You can delete your own comments. You cannot delete comments added by other users.

You can perform the following tasks:

- [3.2.10.1. Post a comment on a document](#)
- [3.2.10.2. Respond to a comment](#)
- [3.2.10.3. Generate the Comment Log Report](#)

3.2.10.1. Posting a Comment on a Document

Overview

You can post a comment on a document and associate a reference number with the comment. The date the comment is posted is also recorded.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

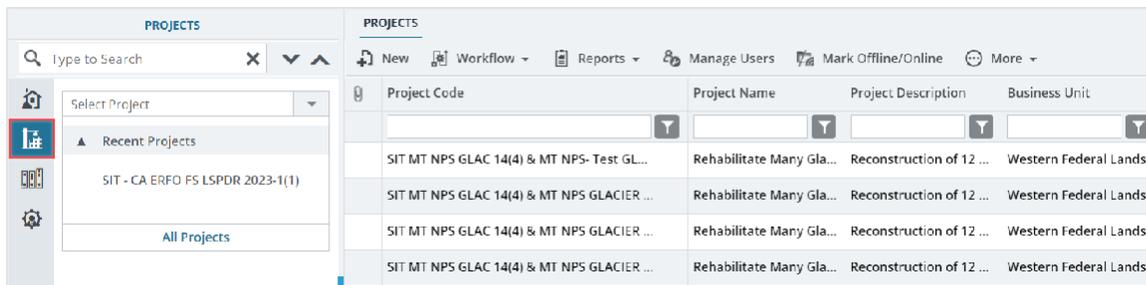


Figure 187: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

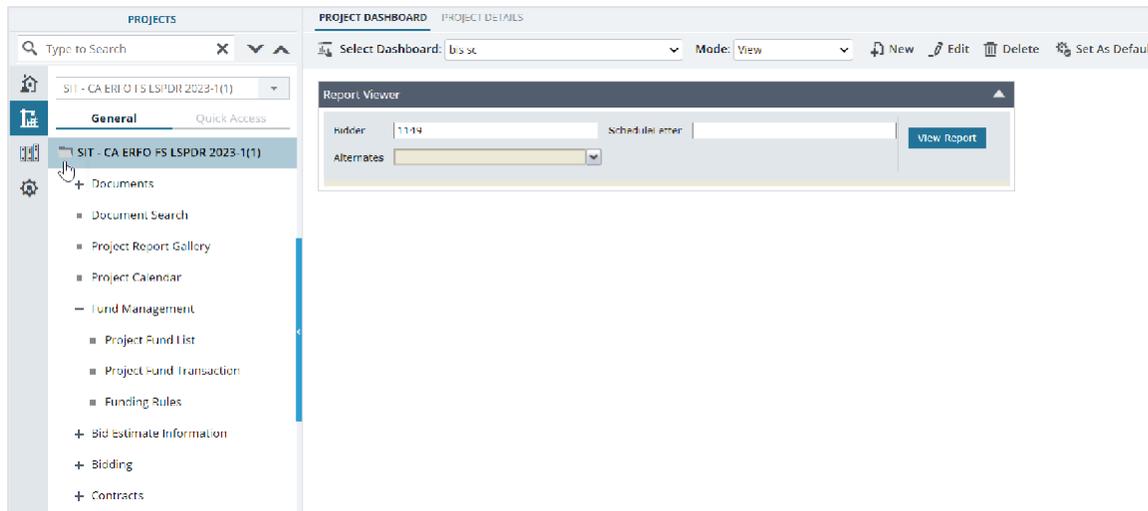


Figure 188: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

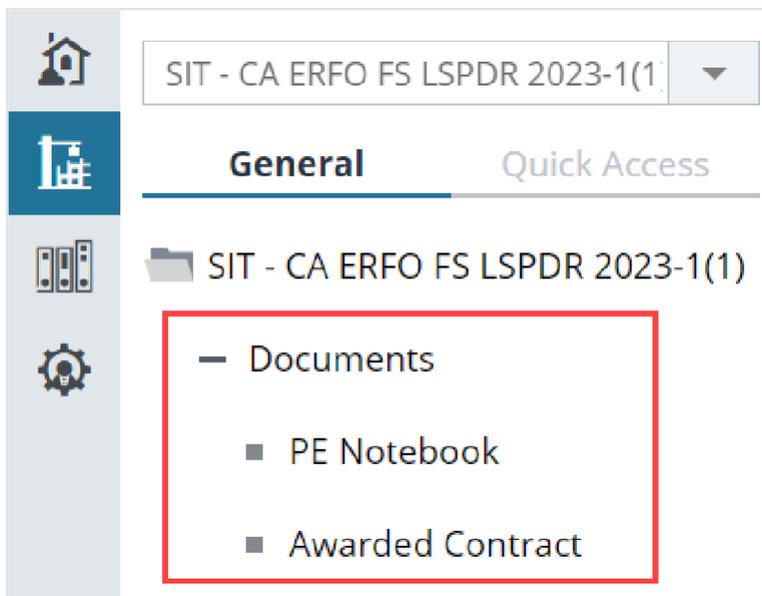


Figure 189: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - a. In the navigation pane, expand the **Contracts** folder, and then expand the contract.

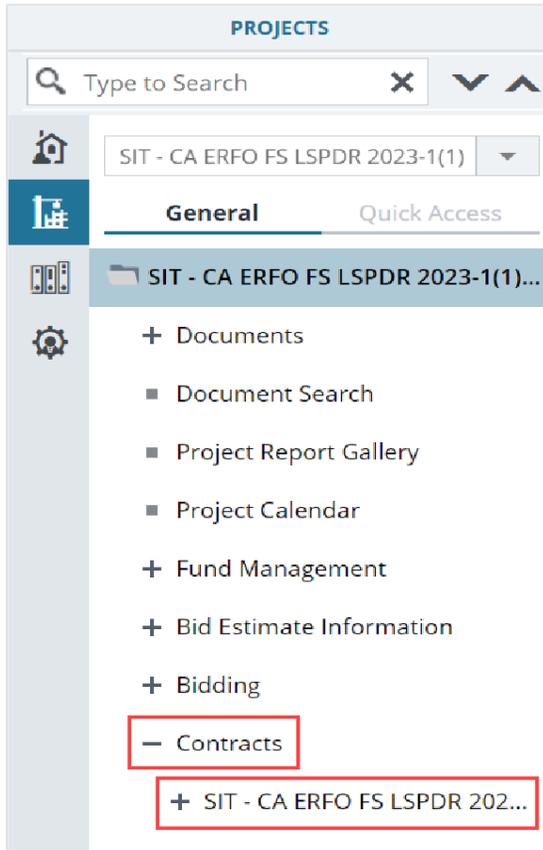


Figure 190: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

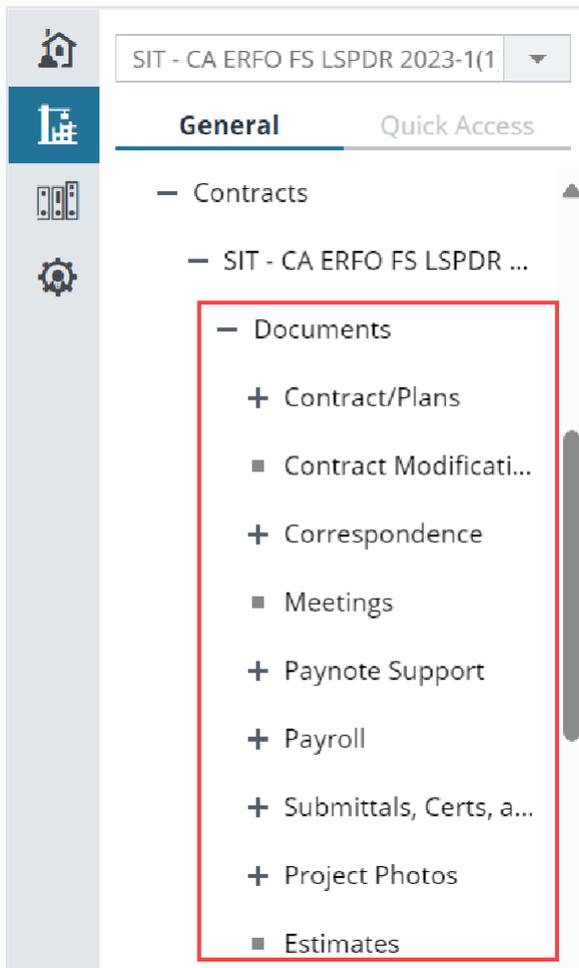


Figure 191: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

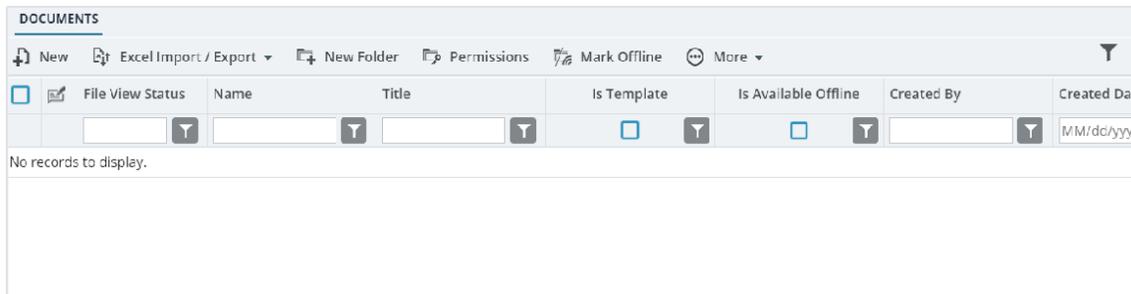


Figure 192: Documents List Page

2. Select a document, and then click **Comment Log**.

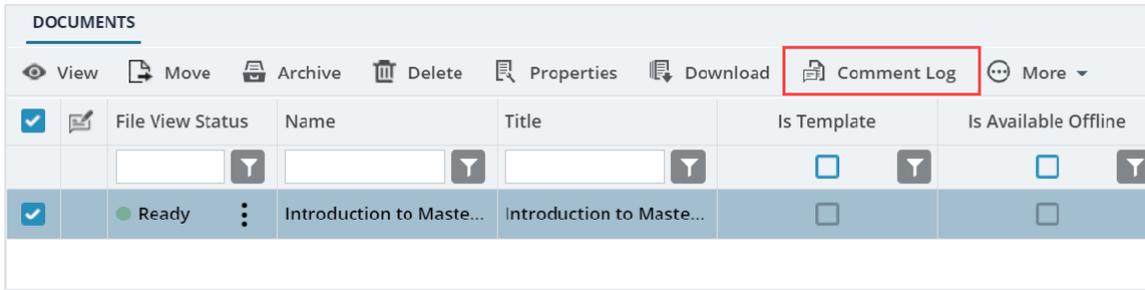


Figure 193: Comment Log Option

The **COMMENT LOG** page is displayed.

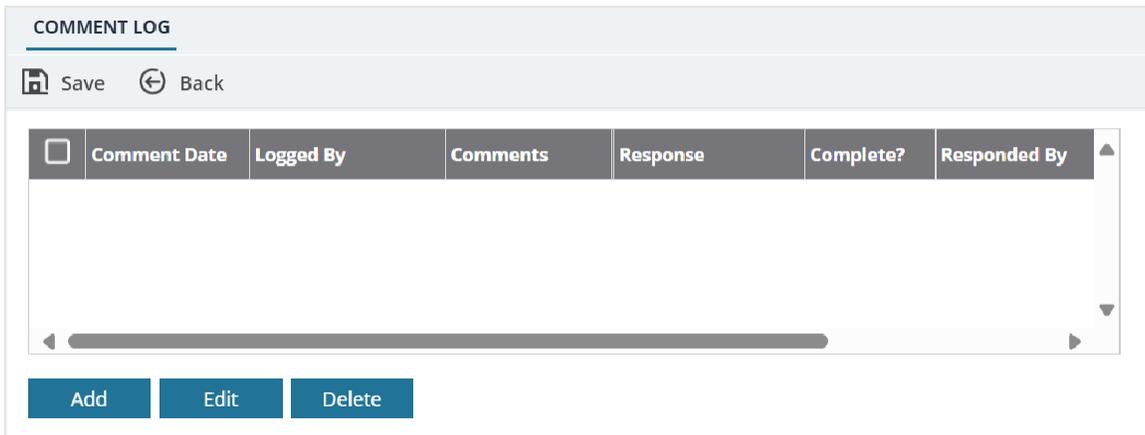


Figure 194: Comment Log Page

3. Click **Add**.

A row is added to the comment log list.

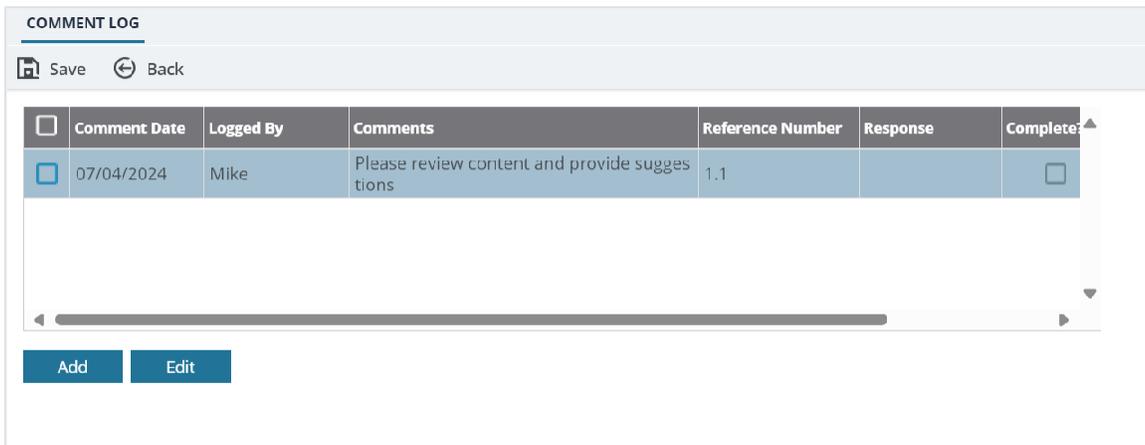


Figure 195: Add Comment

The date the comment is posted, and the user name of the user posting the comment are displayed.

4. In the added row, double-click in the **Comments** column, and enter comments for the document.
5. In the added row, double-click in the **Reference Number** column, and enter a reference number for the comment.

6. Click **Save**.

3.2.10.2. Responding to a Comment

Overview

You can respond to a comment posted by any user. The date the response is posted is also saved.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:
 - a. In the module menu, click **Projects**.

The **PROJECTS** list page is displayed.

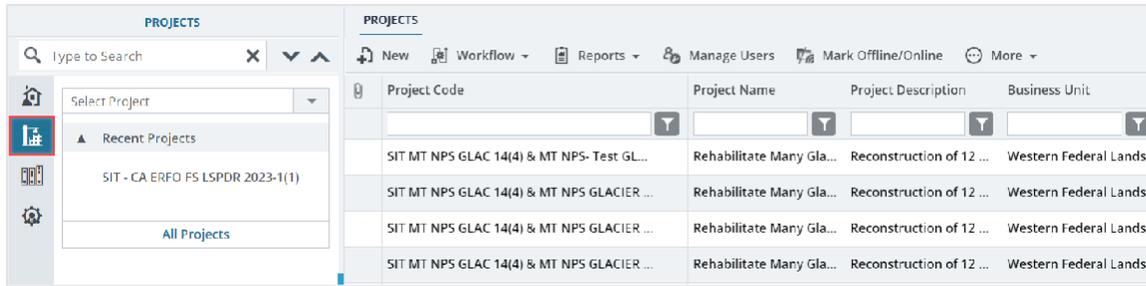


Figure 196: Project List Page

- b. In the list page, double-click the appropriate project, and then expand the project folder.

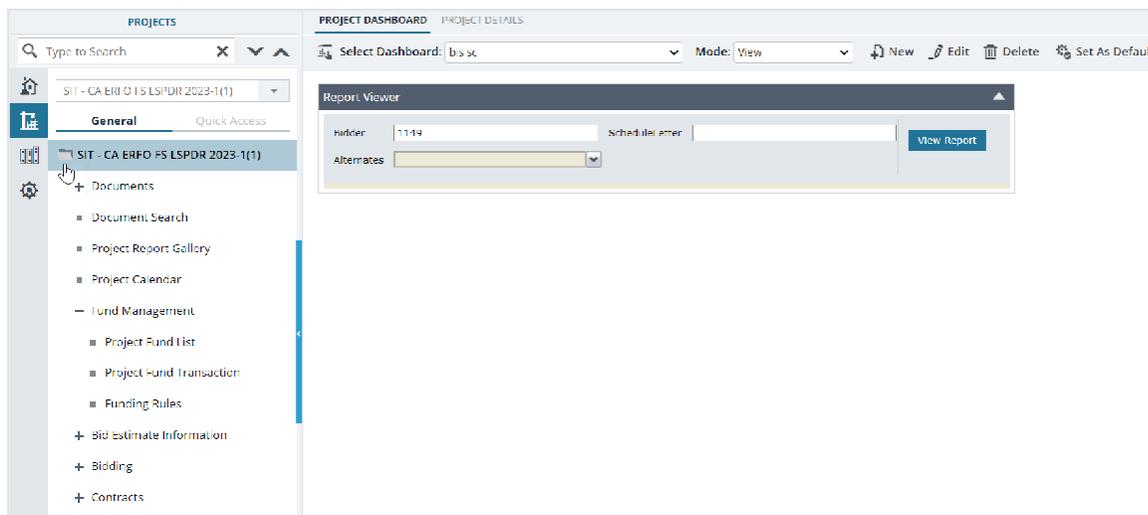


Figure 197: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

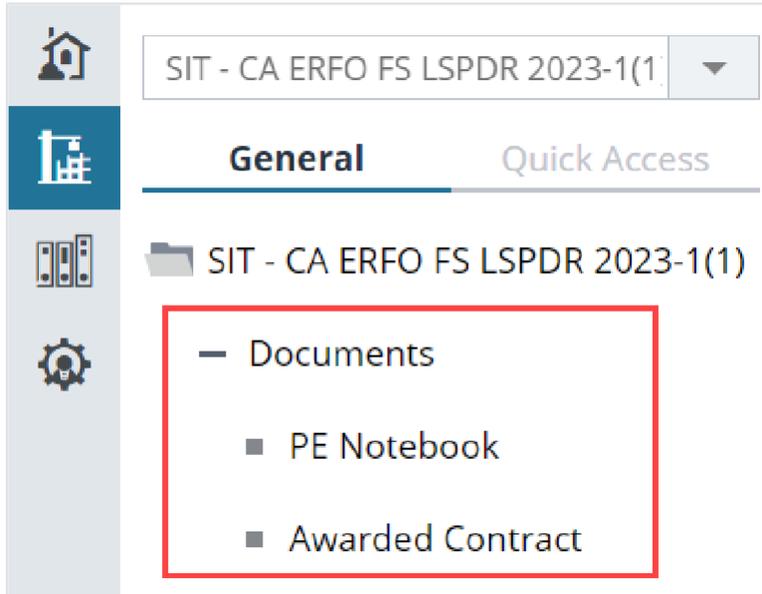


Figure 198: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - In the navigation pane, expand the **Contracts** folder, and then expand the contract.

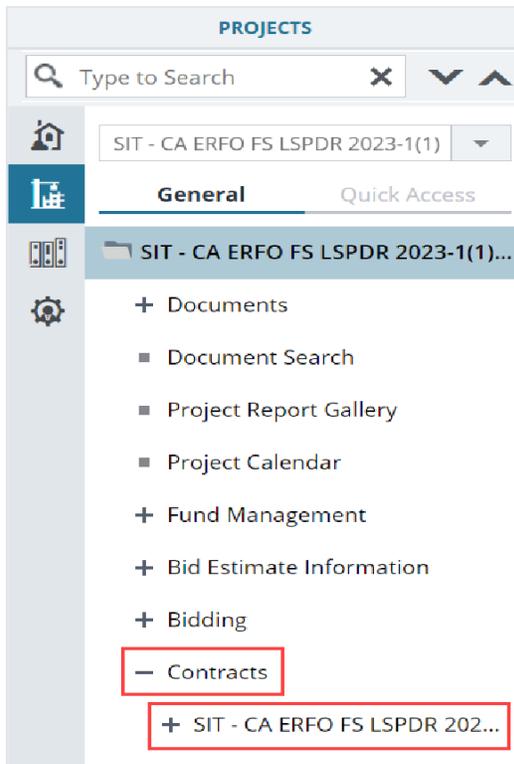


Figure 199: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

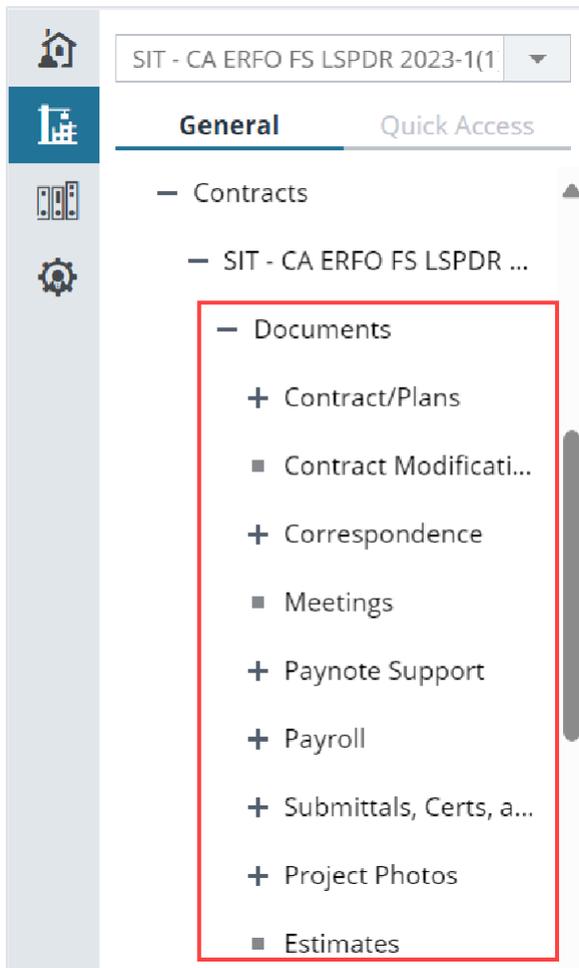


Figure 200: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

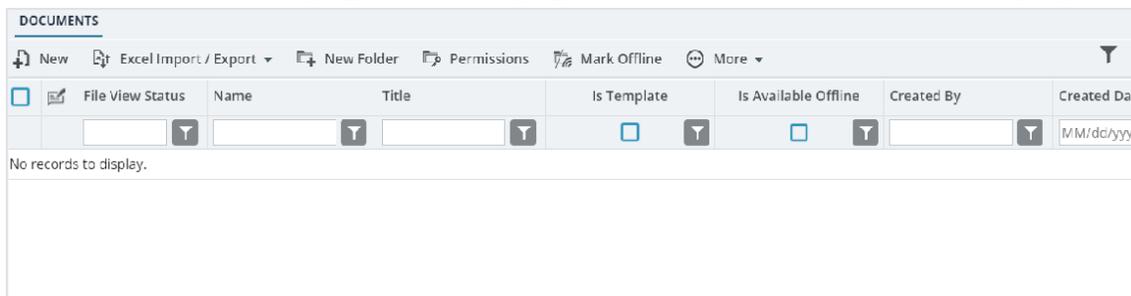


Figure 201: Documents List Page

2. Select a document, and then click **Comment Log**.

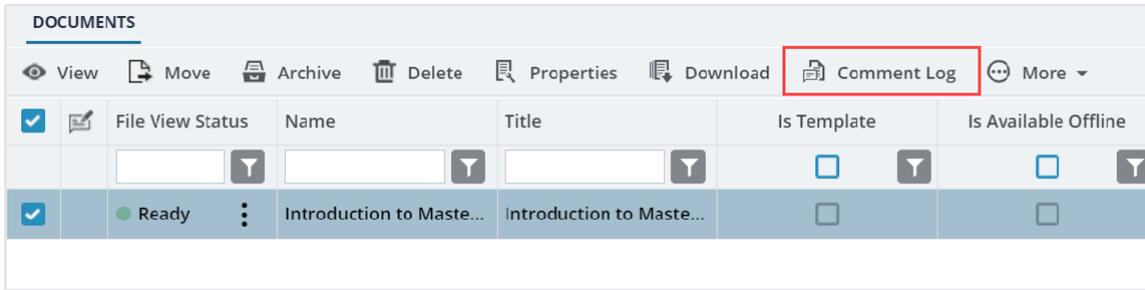


Figure 202: Comment Log Option

The **COMMENT LOG** page is displayed.



Figure 203: Comment Log Page

3. Select a comment, and then click **Edit** to respond to the comment.

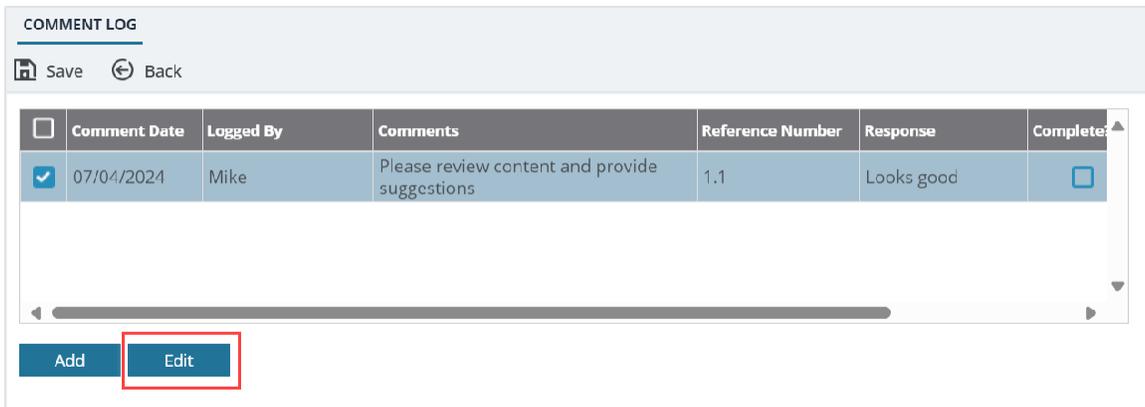


Figure 204: Edit Comment

The **Responded By** column is updated with the user name of the logged-in user.

The **Responded On** column displays the response received date.

4. In the selected row, double-click in the **Response** column, and enter a response to the comment.
5. Select the **Complete** check box if the comment has received an appropriate response.
6. Click **Save**.

3.2.10.3. Generating the Comment Log Report

Overview

The **Comment Log Report** provides details on all the comments and their responses from the comment log for the selected document. The report displays details chronologically with the latest comment post displayed first.

Steps

1. To access a Documents folder at the project or contract level, perform the following steps:

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

The **PROJECTS** list page is displayed.

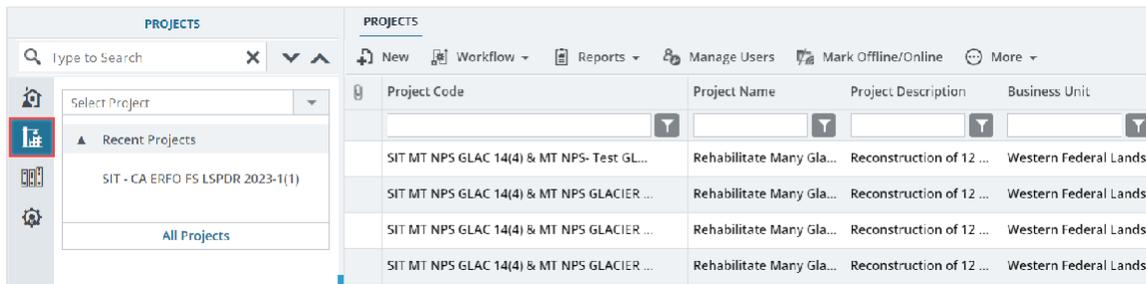


Figure 205: Project List Page

b. In the list page, double-click the appropriate project, and then expand the project folder.

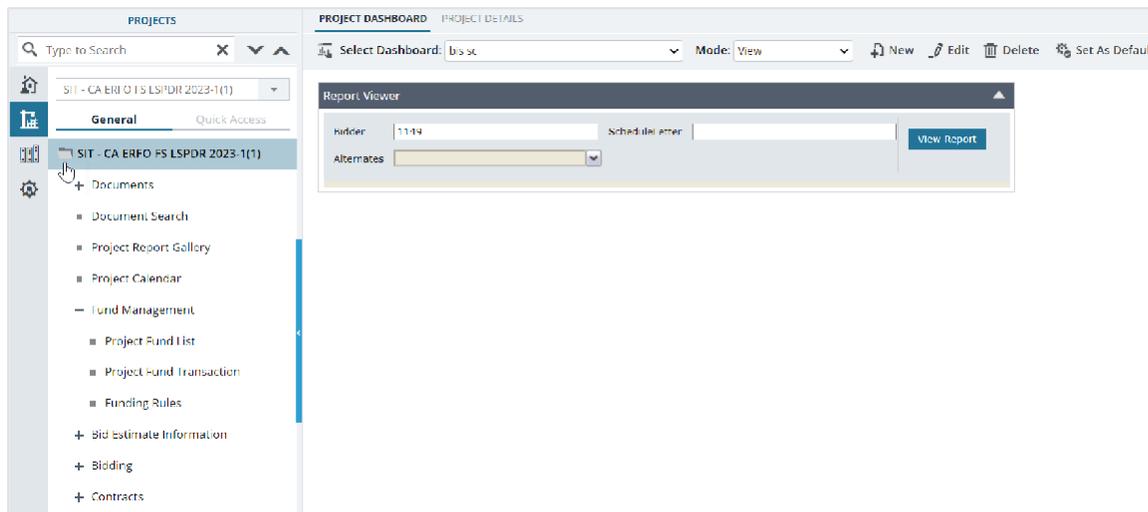


Figure 206: Expanding Projects Folder

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

- To access the **Documents** folder at the project level, click **Documents**, or expand **Documents** and click the appropriate sub-folder.

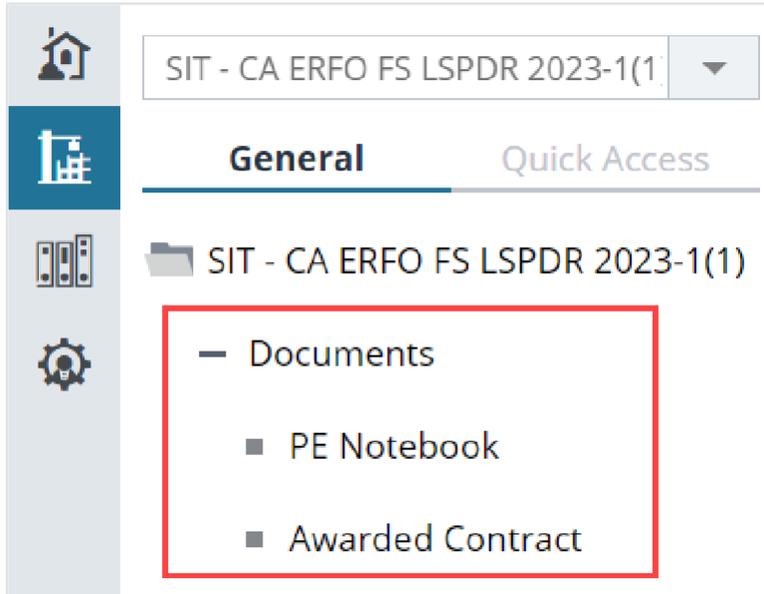


Figure 207: Project Document

- To access the **Documents** folder at the contract level, perform the following steps:
 - In the navigation pane, expand the **Contracts** folder, and then expand the contract.

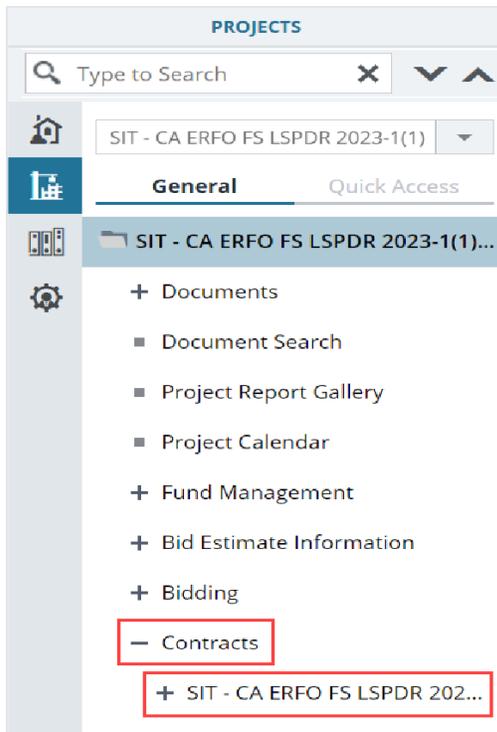


Figure 208: Expanding Contracts

b. Click **Documents**, or expand **Documents** and click the appropriate sub- folder.

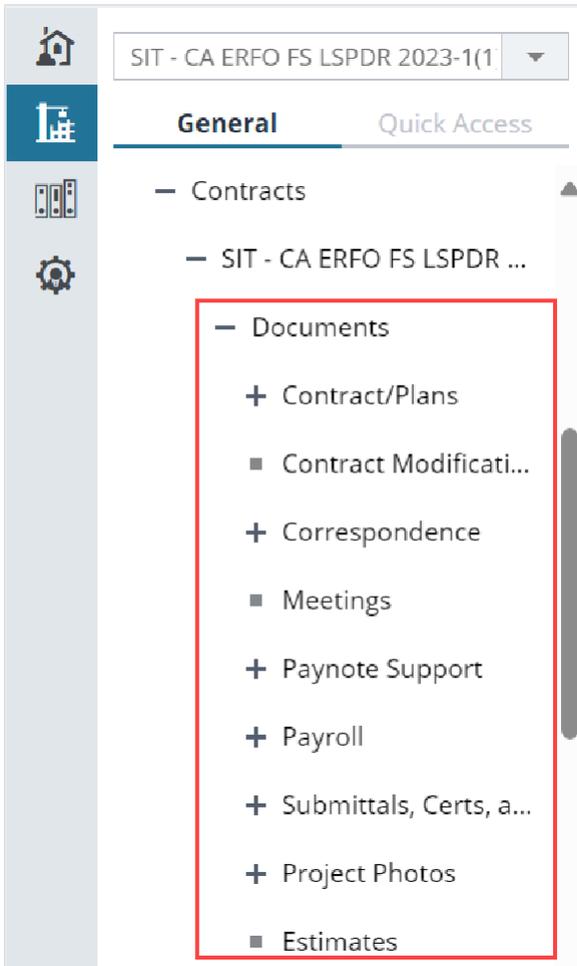


Figure 209: Contract Documents

The **DOCUMENTS** list page or the list page of the selected sub-folder is displayed.

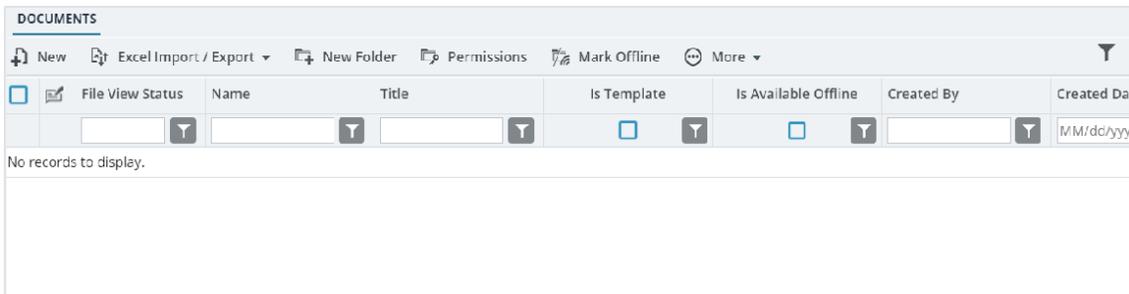


Figure 210: Documents List Page

2. Select the appropriate document, click **Report**, and then click **Comment Log Report**.

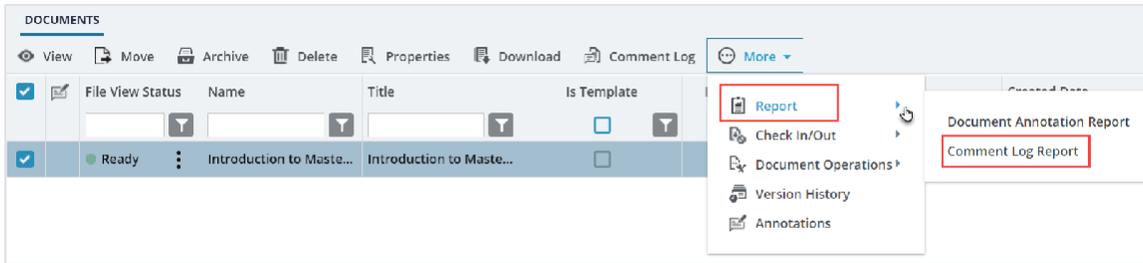


Figure 211: Comment Log Report Option

The **COMMENT LOG REPORT** page is generated and displayed.

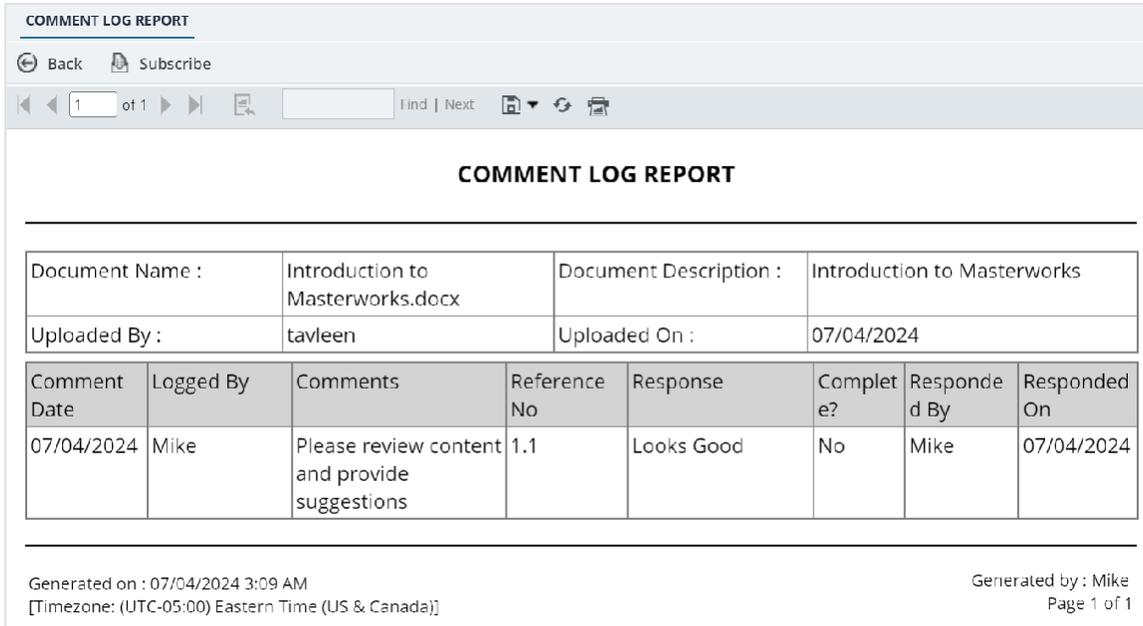


Figure 212: Comment Log Report

For information on the various report features available, refer to [Section 4.1. Standard Report Functions](#).

3.3. Searching for Documents at the Enterprise Level

Overview

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

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

Steps

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

The **ENTERPRISE DASHBOARD** is displayed.

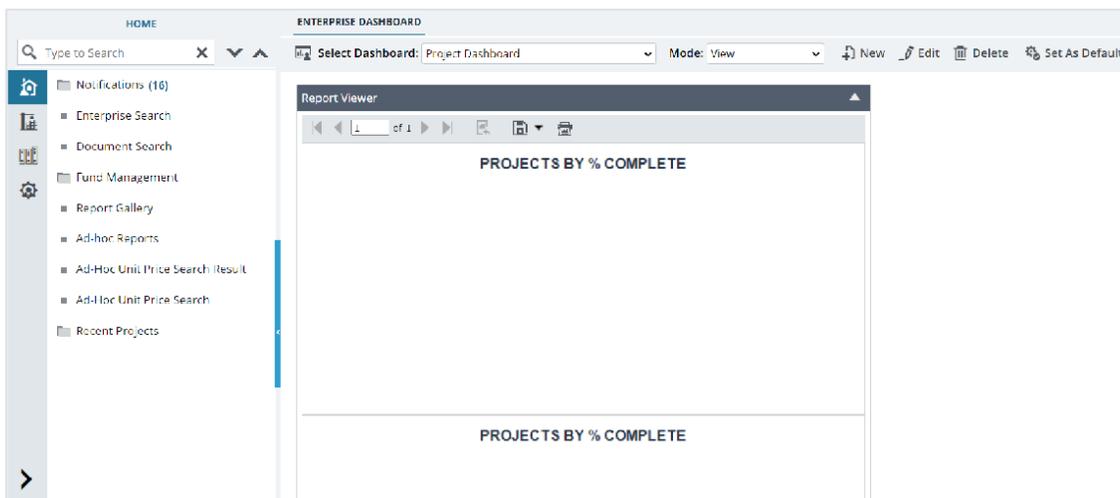


Figure 213: Enterprise Dashboard Page

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

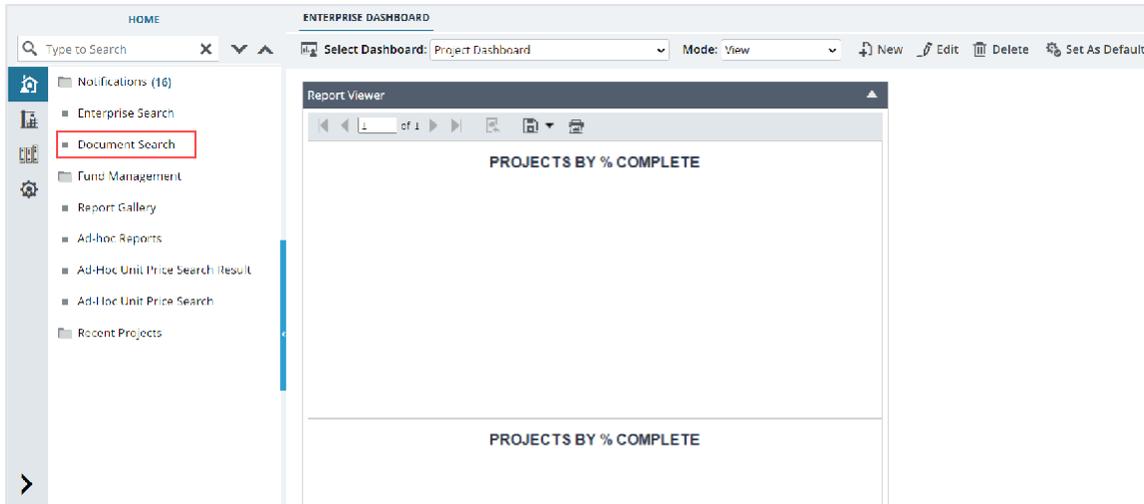


Figure 214: Document Search

The **SEARCH DOCUMENTS** page is displayed.

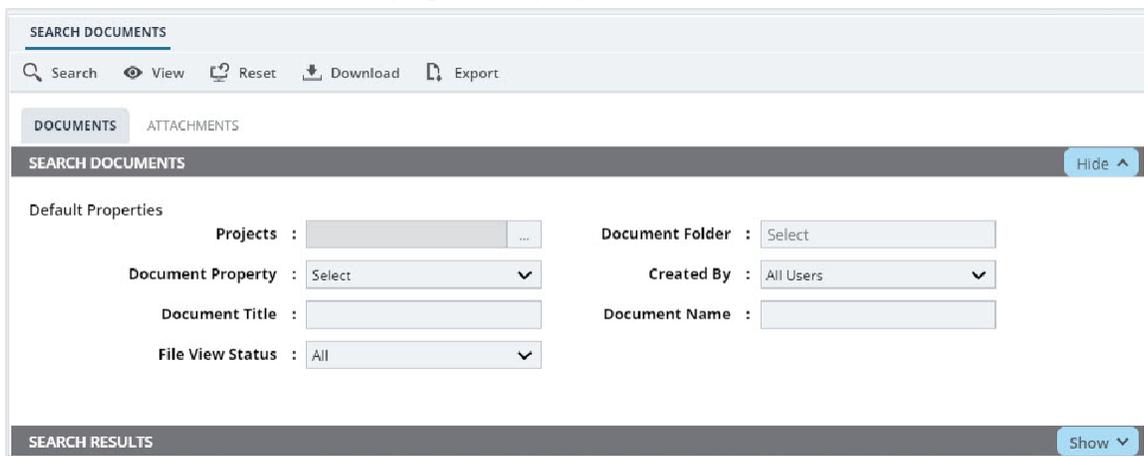


Figure 215: Search Documents

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

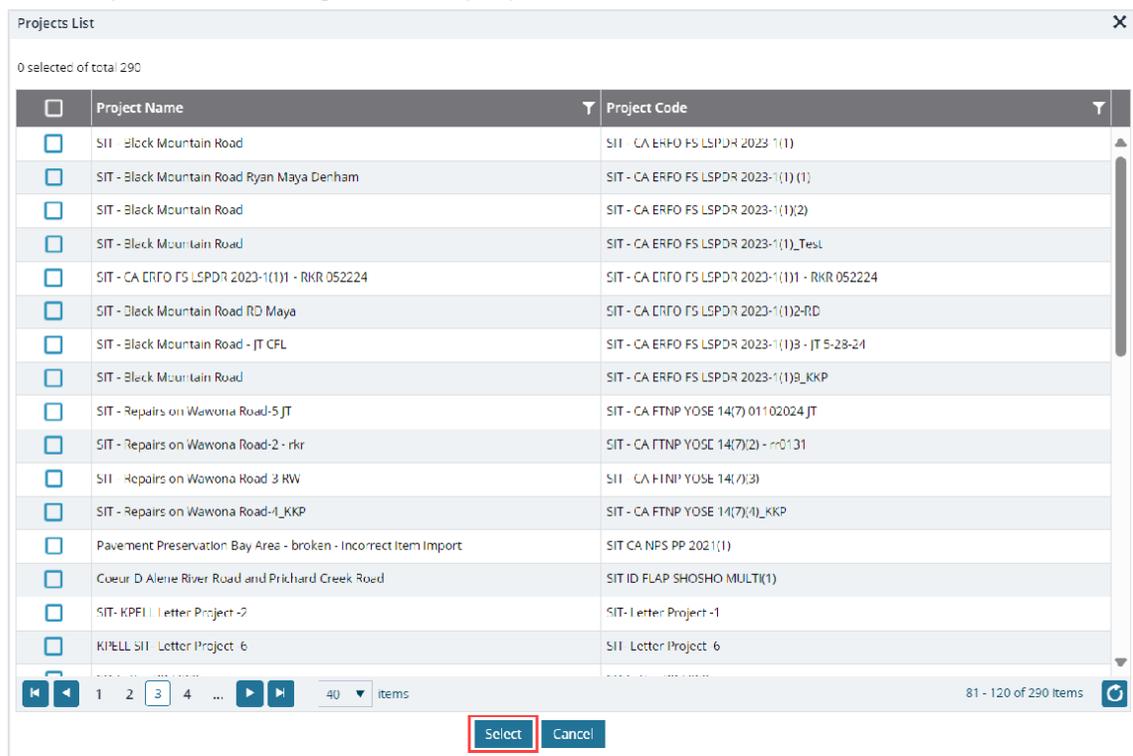
Perform either of the following steps:

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

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

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

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



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

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

 - If no projects are selected in the **Projects** field, then all folders defined in the **Documents** module of all projects are displayed.
 - If projects are selected in the **Projects** field, then all folders defined in the **Documents** module of the selected projects are displayed.
- To search for documents uploaded as attachments to forms and workflows, click the **ATTACHMENTS** tab, and in the **SEARCH ATTACHMENTS** section, perform the following steps:

- a. To define basic criteria to search for attachments, perform the following steps:
 - i. In the Document Title box, enter the title of the document.
 - ii. In the Document Name box, enter the name of the document.
 - iii. From the File View Status drop-down list, select the status of the document.
 - iv. From the Created By drop-down list, select the user name of the user who has uploaded the document.
Available user names are of users who have uploaded documents in the application.
- b. To search for documents from the projects, in the Projects field, perform the following steps:
 - i. Click .
The **Projects List** dialog box is displayed.
 - ii. Select the appropriate projects, and then click **Select**.
- c. To search for attachments from the forms, in the **Select Form** box, click and select the appropriate forms.
Alternatively, type the name of the form, and then click the appropriate form.

4. Click **Search**.

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

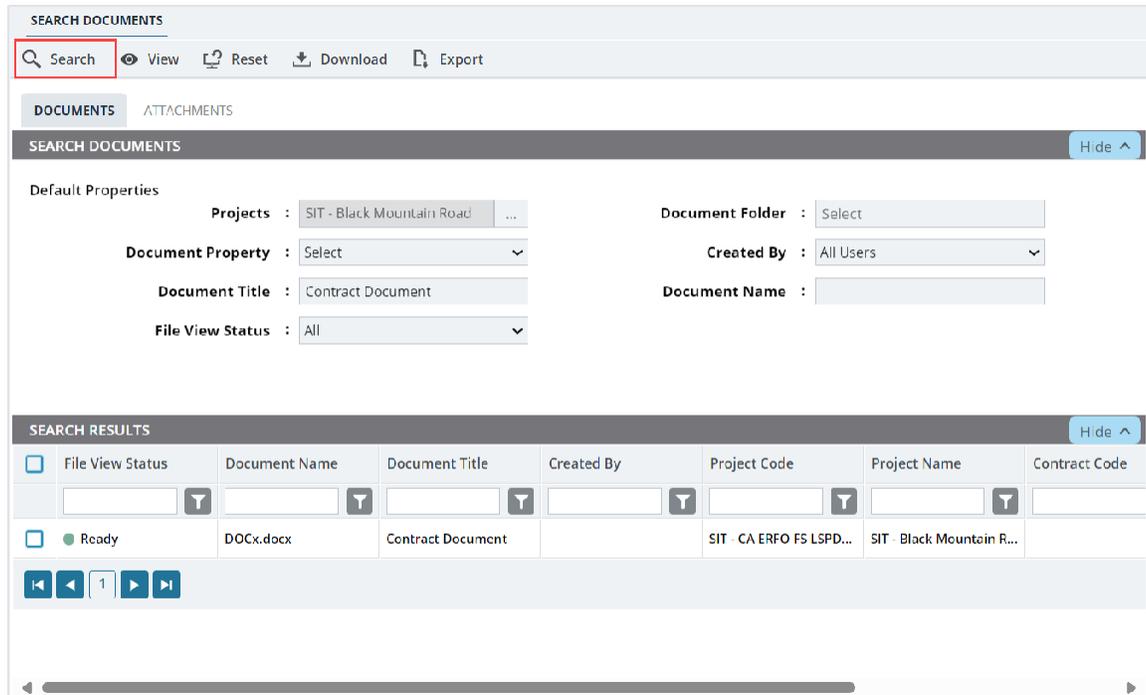


Figure 216: Search Results

5. You can perform the following actions:

- To download documents, in the **SEARCH RESULTS** section, select the appropriate documents, and then click **Download**.
The selected documents are downloaded to your local hard drive.

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

3.4. Searching for Documents at the Project Level

Overview

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

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

Steps

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

The **PROJECTS** list page is displayed.

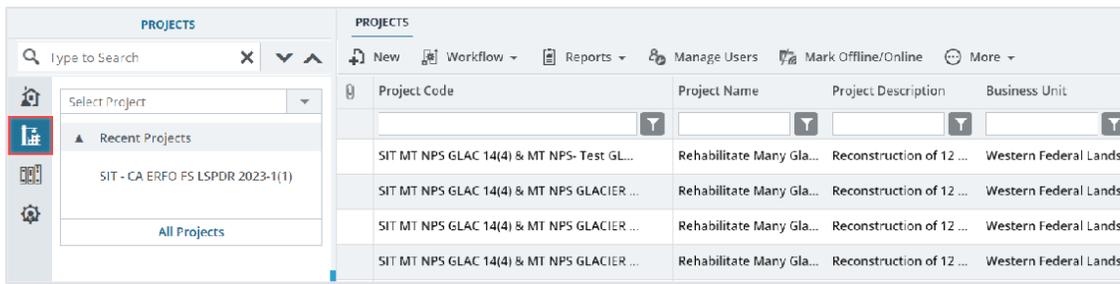


Figure 217: Navigation to Projects Module

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

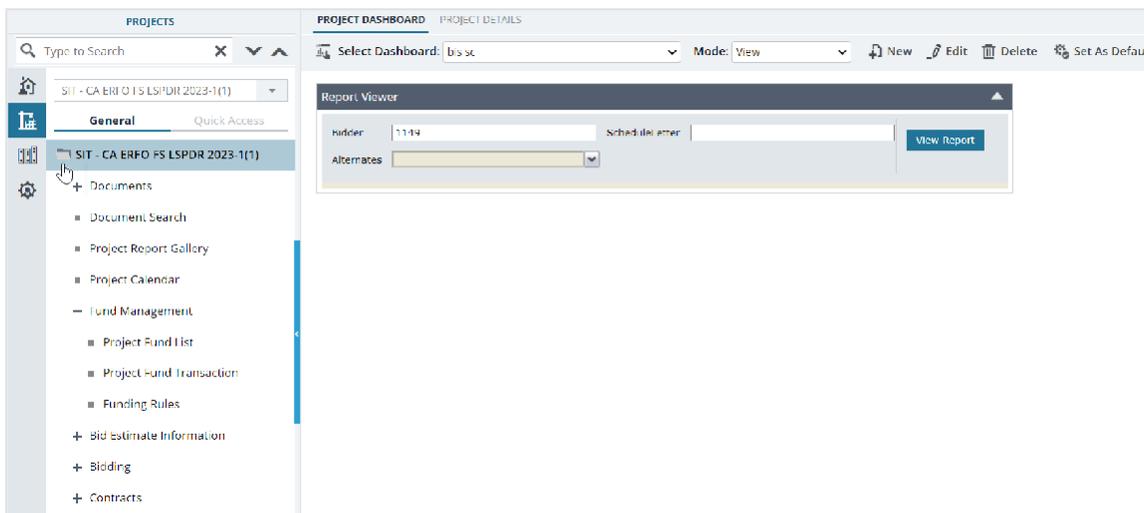


Figure 218: Expanding Projects Folder

3. Click **Document Search**.

The **SEARCH DOCUMENTS** page is displayed.

SEARCH DOCUMENTS

Search View Reset Download Export

DOCUMENTS ATTACHMENTS

SEARCH DOCUMENTS Hide

Default Properties

Projects : RB_DOT_09 Document Folder : Select

Document Property : Select Created By : All Users

Document Title : Document Name :

File View Status : All

SEARCH RESULTS Show

The **Projects** field in the **SEARCH DOCUMENTS** section displays the name of the project.

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

Perform either of the following steps:

- To search for documents in the **Documents** folders of projects, in the **SEARCH DOCUMENTS** section, perform the following steps:
 - a. To define basic criteria to search for documents, perform the following steps:
 - i. In the **Document Title** box, enter the title of the document.
 - ii. In the **Document Name** box, enter the name of the document.
 - iii. From the **File View** Status drop down list, select the status of the document.
 - iv. From the **Created By** drop-down list, select the user name of the user who has uploaded the document.
Available user names are of users who have uploaded documents in the application.
 - b. To define additional search criteria, perform the following steps:
 - i. From the **Document Property** drop-down list, select the appropriate document property. The **Advanced Properties** section is displayed. The search criteria in the section are based on the Document Property selected.
 - ii. In the **Advanced Properties** section, provide the appropriate information. Available fields are based on the document property selected from the **Document Property** drop-down list.

- c. To search for documents from the folders, in the **Document Folder** box, click and select the appropriate document folders.
Alternatively, type the name of the document folder, and then click the appropriate folder.
Available options are folders defined in the **Documents** folder of the associated project.
- To search for documents uploaded as attachments to forms and workflows, click the **ATTACHMENTS** tab, and in the **SEARCH ATTACHMENTS** section, perform the following steps:
 - a. To define basic criteria to search for attachments, perform the following steps:
 - i. In the **Document Title** box, enter the title of the document.
 - ii. In the **Document Name** box, enter the name of the document.
 - iii. From the **Created By** drop-down list, select the user name of the user who has uploaded the document.
Available user names are of users who have uploaded documents in the application.
 - iv. From the **File View Status** drop-down list, select the status of the document.
 - b. To search for attachments from the forms, in the **Select Form** box, click and select the appropriate forms.
Alternatively, type the name of the form, and then click the appropriate form.
5. Click **Search**.
Based on the search criteria specified, the **SEARCH RESULTS** section displays the list of documents that match the search criteria.
6. You can perform the following actions:
 - To download documents, in the **SEARCH RESULTS** section, select the appropriate documents, and then click **Download**.
The selected documents are downloaded to your local hard drive.
 - To export details of the list of documents available in the **SEARCH RESULTS** section to an Excel workbook, click **Export**.
The properties of documents in the search results are downloaded as an Excel workbook to your local hard drive.
 - To open a document, select a document and then click **View**.
The document is opened in the document viewer.
 - To open the folder or form where the document is available, in the **SEARCH RESULTS** section, double-click the appropriate document.

4. Appendix

4.1. 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:

- [4.1.1. Generating and Viewing Reports](#)
 - [4.1.1.1. Generating a report](#)
 - [4.1.1.2. Printing a report](#)
 - [4.1.1.3. Saving a report in various formats](#)
 - [4.1.1.4. Updating report to view the latest information](#)
- [4.1.2. Subscribing to a report](#)

4.1.1. 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:

- [4.1.1.1. Generating a report](#)
- [4.1.1.2. Printing a report](#)
- [4.1.1.3. Saving a report in various formats](#)
- [4.1.1.4. Updating report to view the latest information](#)

4.1.1.1. 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.

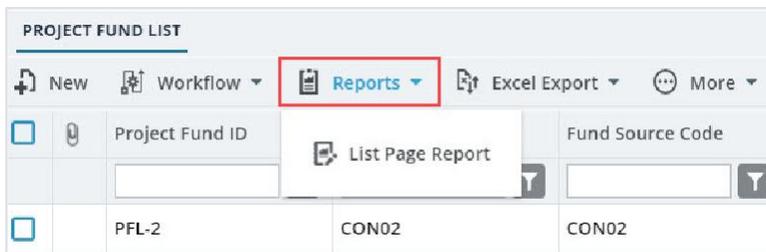


Figure 219: Using Reports Option

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

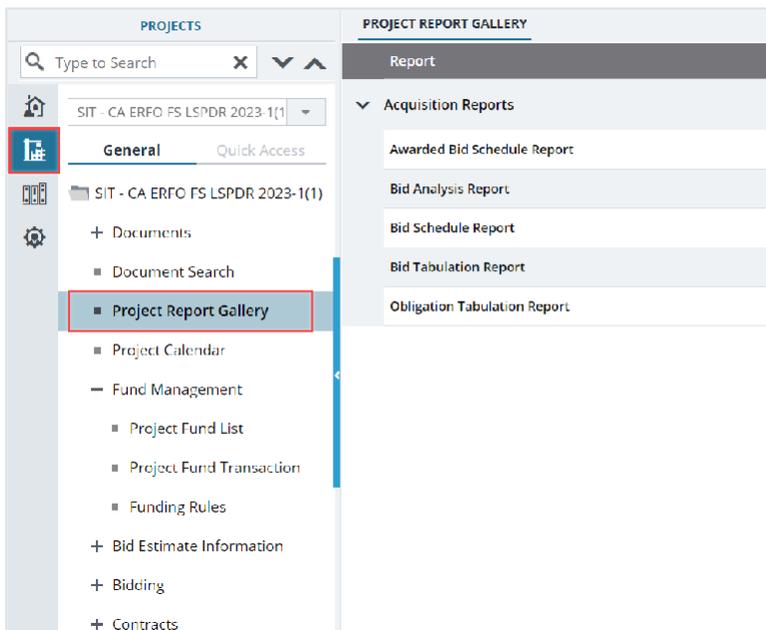


Figure 220: Project Report Gallery Navigation Page

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

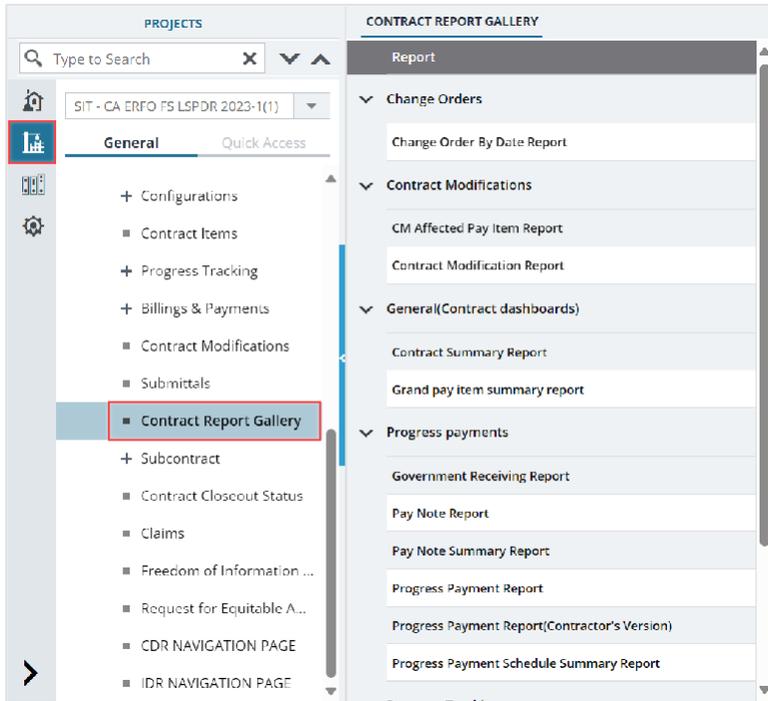


Figure 221: Contract Report Gallery Navigation Page

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

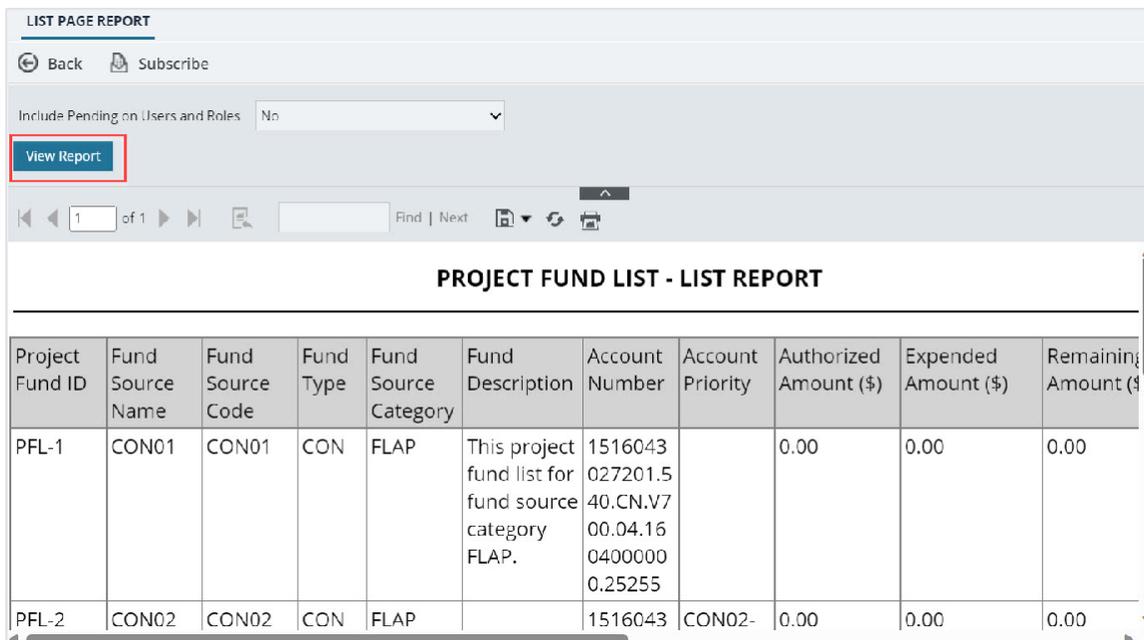


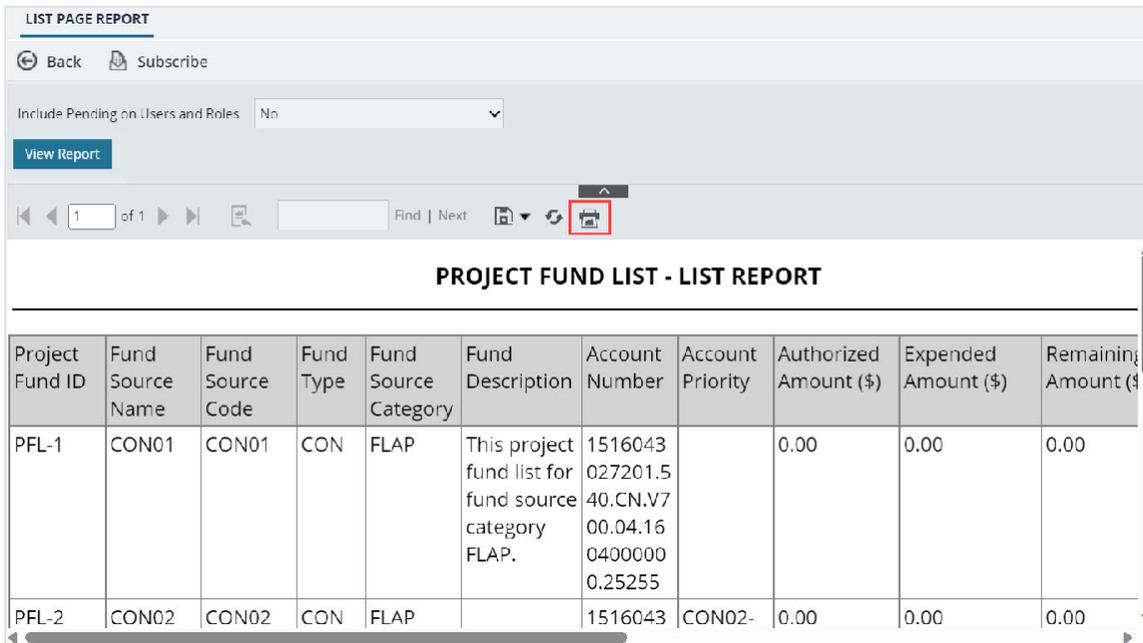
Figure 222: Using View Report Option

The report is generated and displayed.

4.1.1.2. Printing a Report

Steps

1. Generate the required report.
For more information, refer to [Section 4.1.1.1. Generating a Report](#)
2. In the report toolbar, click **Print Report** .



The screenshot shows a web interface for a report titled "LIST PAGE REPORT". At the top, there are "Back" and "Subscribe" buttons. Below that is a dropdown menu for "Include Pending on Users and Roles" set to "No", and a "View Report" button. The toolbar contains navigation icons, a search box, and a "Print Report" icon highlighted with a red box. The report content is titled "PROJECT FUND LIST - LIST REPORT" and contains a table with the following data:

Project Fund ID	Fund Source Name	Fund Source Code	Fund Type	Fund Source Category	Fund Description	Account Number	Account Priority	Authorized Amount (\$)	Expended Amount (\$)	Remaining 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 223: Using Print Report Option

4.1.1.3. Saving a Report

Steps

1. Generate the required report.
For more information, refer to [Section 4.1.1.1. Generating a Report](#)
2. In the report toolbar, click **Export**, and then click the required option.

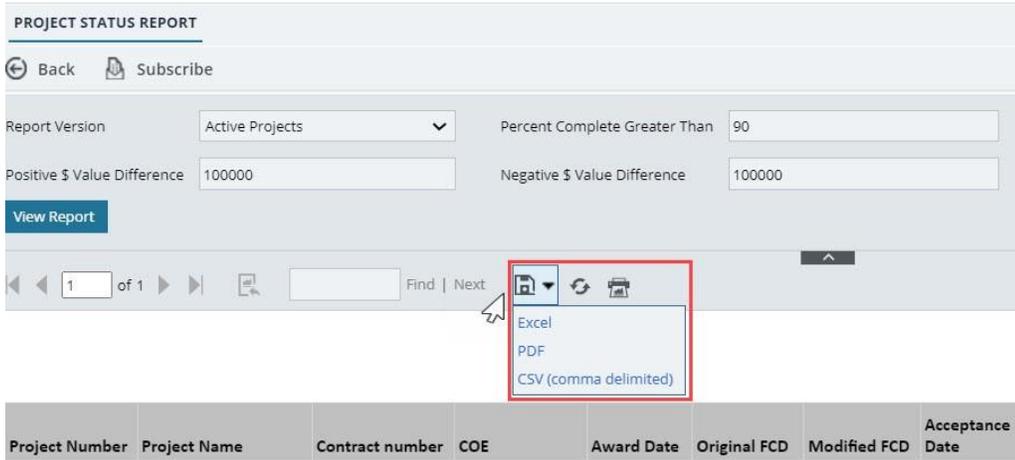


Figure 224: Exporting a Report

4.1.1.4. Viewing Latest Information in a Report

Steps

1. Generate the required report.
For more information, refer to [Section 4.1.1.1. Generating a Report](#)
2. In the report toolbar, click **Refresh** 

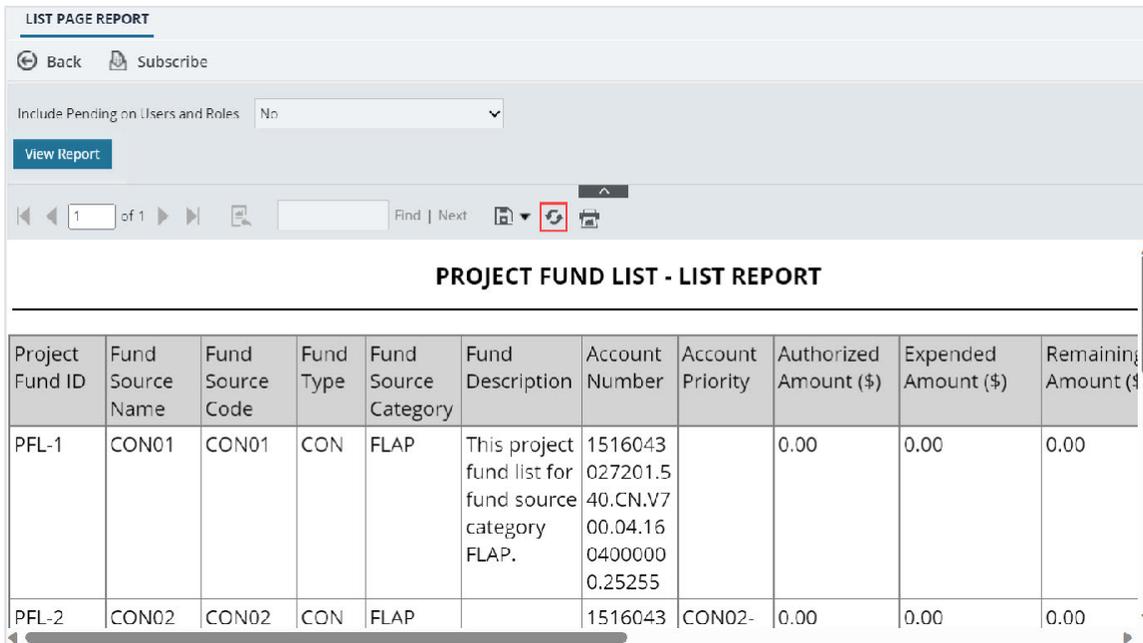


Figure 225: Using Refresh Option

4.1.2. 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  **Subscribe**.

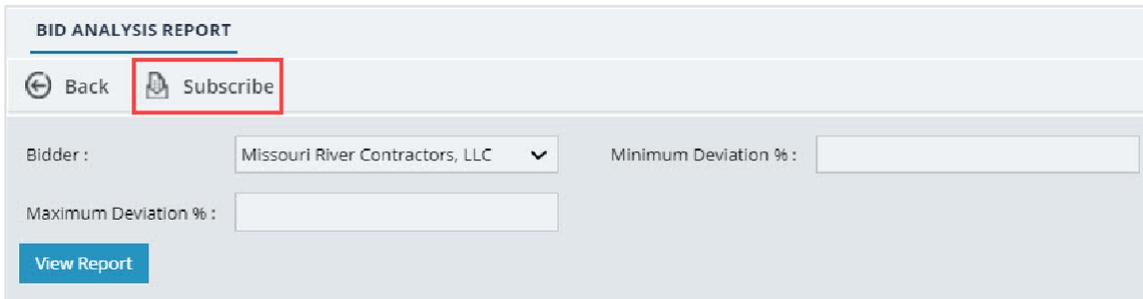


Figure 226: Subscribing a Report

The subscription dialog box is displayed.

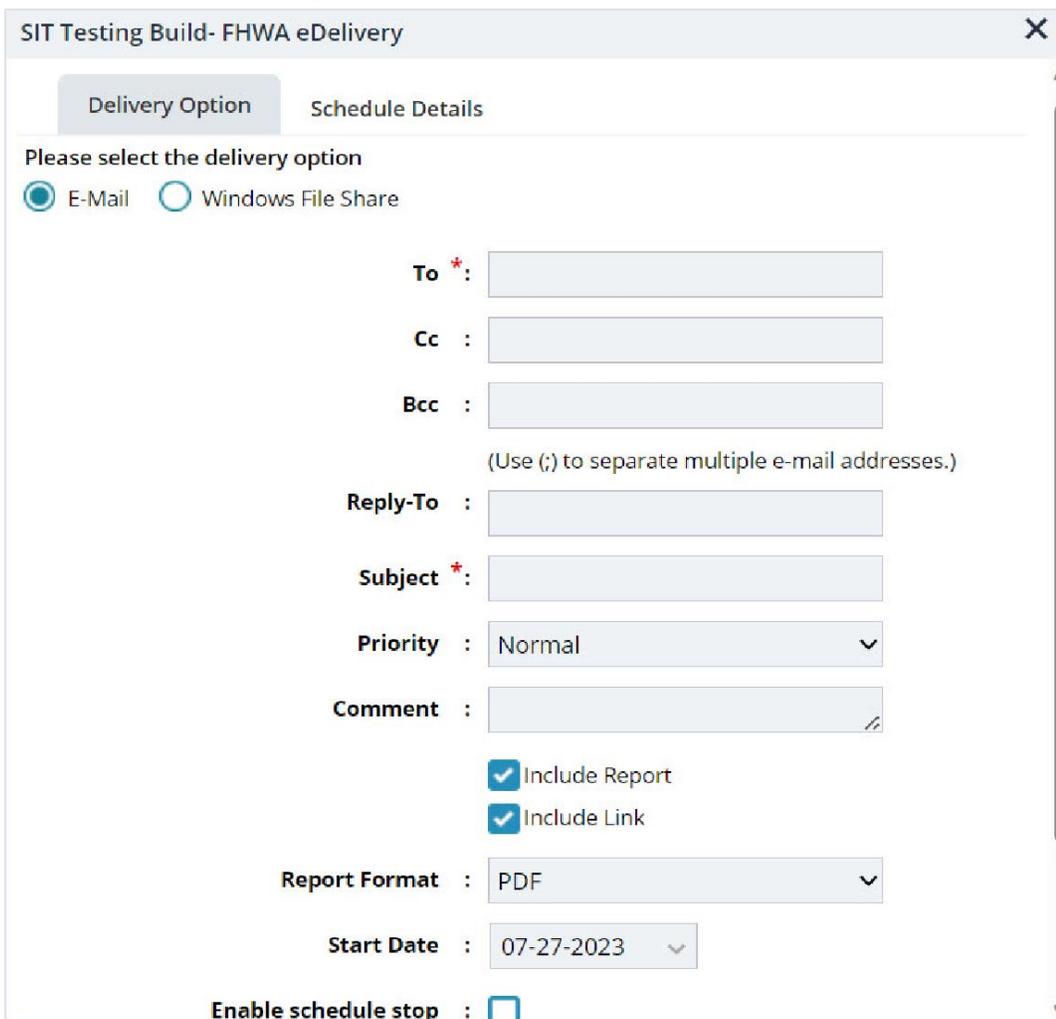


Figure 227: Subscription Dialog Box

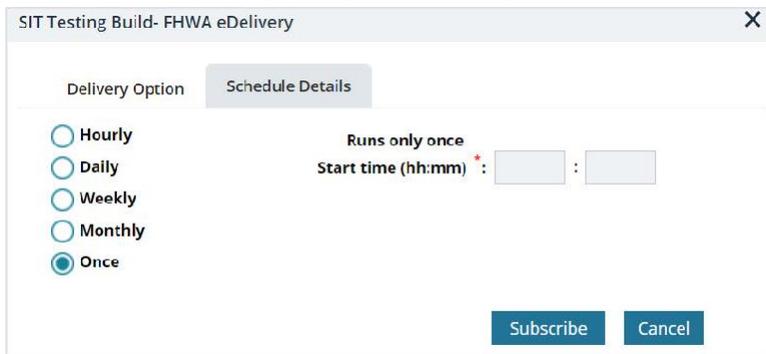
Note: To subscribe to a report, you must fill the fields with red asterisks.

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:

E-Mail	Windows File Share
<ol style="list-style-type: none"> a. In the To box, enter the email addresses of the recipients of the report. b. In the Reply-To box, enter the email addresses of the recipients to whom the reply email must be delivered. c. In the Subject box, enter the name of the report or any other appropriate subject for the email. d. From the Priority drop-down list, select the priority of the email. If the selected priority is High, the email will be sent as a High Priority notification. e. In the Comment box, enter any comment for the email. Comments are included in the body of the email. f. Select the Include Report check box to deliver the report in the selected format as an email attachment. g. Select the Include Link check box to deliver the link to the report in the report delivery email. The recipient can view the report on the application only if the recipient has the required permissions on the report. h. From the Report Format drop- down list, select the format in which the report must be generated and delivered to the specified email addresses. i. From the Start Date list, click the date from when the report must be delivered. j. Select the Stop this schedule on check box, and then select the date until when the report must be delivered. 	<ol style="list-style-type: none"> a. In the File Name box, enter the file name for the report. b. Select the Add a file extension when the file is created check box to save the report file name with the extension of the file format as required for the report. c. In the Path box, enter the path of the shared file location where the report must be saved. Note: To configure the shared file location in the application, you must provide the file path location to the Administrator. d. From the Report Format drop-down list, select the format in which the report must be generated and saved. e. In the Credentials used to access the file share section, enter the credentials to access the shared location and save the report. f. From the Overwrite options section, click any of the following options: <ul style="list-style-type: none"> • Overwrite an existing file with a newer version - When saving the report at the file location at the scheduled time, if a file with the same name exists, then the existing file is overwritten by the latest report. • Do not overwrite the file if a previous version exists - When saving the report at the file location at the scheduled time, if a file with the same name exists, then the report is not overwritten by the latest report, and the report is not saved at the file location. • Increment file names as newer versions are added - When saving

E-Mail	Windows File Share
	<p>the report at the file location at the scheduled time, if a file with the same name exists, then the latest report is saved with the same name appended with a sequential number.</p> <p>g. From the Start Date list, click the date from when the report must be saved.</p> <p>h. Select the Stop this schedule on check box, and then select the date up to when the report must be saved at the file location.</p>

4. To set the frequency of report delivery, click the 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.	<p>a. Click Hourly in the delivery options list.</p> <p>b. In the Run the schedule every section, enter the frequency of report delivery:</p> <ol style="list-style-type: none"> In the hours and minutes boxes, enter the time period in hours and minutes the report must be periodically delivered. In the Start time (hh:mm) box, enter the time (in 24-hour format) the report delivery must begin.
Daily	The report is delivered once on preset days, or periodically as defined.	<p>a. Click Daily in the delivery options list.</p> <p>b. In the schedule definition section, enter the frequency of report delivery:</p> <ul style="list-style-type: none"> Click Every Weekday to get the report delivered on all weekdays, from Monday to Friday. Click Repeat after this number of days, and then, then in the box, enter the number of days to get the report

Option	Description	Steps
		<p>delivered periodically once every specified number of days.</p> <p>c. In the Start time (hh:mm) box, enter the time (in 24-hour format) the report must be delivered.</p>
Weekly	The report is delivered every preset number of weeks on preset days of the week.	<p>a. Click Weekly in the delivery options list.</p> <p>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.</p> <p>c. In the On day(s) section, select the days on which the report must be delivered.</p> <p>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) the report must be delivered.</p>
Monthly	The report is delivered monthly on preset days of a selected week.	<p>a. Click Monthly in the delivery options list.</p> <p>b. Select the months when the report must be delivered.</p> <p>c. Click one of the following options to schedule the delivery of the report:</p> <ul style="list-style-type: none"> • On week of the month <ol style="list-style-type: none"> i. From the list of weeks, select the week the report must be delivered. ii. In the On day(s) section, select the days the report must be delivered in the week previously selected. • On Calendar day(s) <ul style="list-style-type: none"> ○ In the box, enter the number of days of the month the report must be delivered, starting from the current day. For example, if the current day is the 12th of a month, and the calendar days set is 10, then the report is sent for 10 days from the 12th of every selected month. <p>d. In the Start time (hh:mm) box, enter the time (in 24-hour format) by when the report must be delivered.</p>
Once	The report is delivered once on the current day.	In the Start time (hh:mm) box, enter the time (in 24-hour format) by when the report must be delivered.

6. Click **Subscribe**.

The report is delivered as scheduled.

Note: Only users with the **Administrator** role can unsubscribe to reports.