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Aurigo Software Technologies Inc.

Masterworks Introduction

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1 Masterworks Introduction

Masterworks is a cloud-based business process automation solution for capital planning, construction project management, mobile inspections and document management.

Masterworks is a robust and versatile solution that uses the cloud, mobile, and GPS technologies to provide enhanced business integration. Its estimation, project, and contract management modules support work site business processes to help construction companies of any size and its stakeholders to operate efficiently, reduce costs, and increase profits.

Masterworks is built to automate multiple phases of construction to provide absolute control over project management. It comprises a flexible data access layer that supports database technologies such as Microsoft SQL Server and Oracle, and a Web architecture that allows users to access information from anywhere and at anytime to efficiently execute complex workflows in the project life cycle. It also seamlessly integrates its database with other third-party software applications using Web services and XML technologies. This flexible, customizable, and scalable application enables users to streamline installation and update the application. The secure 128-bit RSA provides uncompromising security of all business transactions and integrity of data.

Aurigo® Masterworks provides real-time and accurate business intelligence in a concise format through its customizable dashboard called the Masterworks Enterprise.

This cloud-based capital project management application enables:

- Efficient execution of projects through communication and collaboration
- Efficient response and action with availability of latest project data and information
- Better interaction within the entire team that includes owners, contractors, and stakeholders
- Better visibility of projects in/during various stages of the project life cycle

2 Features

Project Planning

The Masterworks Planning module is designed to provide solutions for end-to-end planning activities, such as creating planned projects, defining project schedule and forecast, funding, and project scoring. The Planning module also allows users to create and manage Programs, Master Programs, and define funds for multi-year and annual projects.

Project Management

The Project Management module streamlines construction project processes to a central location. Each project in the enterprise can be tracked and managed efficiently. Project tasks, including budget estimation, contract management, and project closure, can be performed quickly and easily. Dashboards provide real-time information to make informed decisions and maximize management efficiency.

Project Estimation

The Masterworks Project Estimator streamlines the task of creating estimates for project implementation from start to finish. The entire process of cost estimation and maintaining a reliable cost history is automated and centralized. Estimates can be created using asset libraries and archived data of unit prices. Bids for estimate pay items can be invited, tabulated, and analyzed before awarding the most fair and competitive bid.

Contract Management

The Masterworks Contract Management module provides access to contract information at any time and from any place, enabling better collaboration between teams and providing a clear project view to make effective decisions. This module facilitates contract administration and provides features to create a contract, manage contractors and contract items, issue change orders, track project implementation progress, and generate pay estimates. Predefined, standardized forms support contract management. Various reports are available that provide insights into the contract information for key projects.

3 Benefits of Masterworks

Masterworks has several benefits for managers, contractors, stakeholders, and construction companies.

This versatile application enables you to efficiently carry out complex functions to manage a project throughout its life cycle.

Flexible and Easy Deployment

Masterworks is a modular platform that allows you to deploy the entire application as one solution or deploy additional process modules to the core application as per your requirement and capital investment.

Competent Project Planning

Masterworks presents a proven method of using historic data of completed and ongoing projects to plan, estimate, and budget future projects. Its vast asset library comprising catalogs and lists helps you manage projects efficiently.

Instant Access to Information

Masterworks provides instant access to project information, irrespective of time and location, to stakeholders and project management teams without compromising data security. In addition, the Masterworks integrated search engine allows you to quickly filter data based on your requirements.

Complete Process Management

Masterworks is a flexible platform with capabilities to manage the entire life cycle of projects, beginning with planning and ending with project closure.

Multiple Estimation Management

The Masterworks Estimator allows you to create and manage multiple estimates for a project using historic data. In addition, you can easily manage bid analysis with the automated tabulation and reporting features in Masterworks. You can also award the items of an estimate to a contractor, using the Masterworks Estimator.

Intelligent Contract Management

The Masterworks Contract Management module allows you to create and track multiple projects with inbuilt processes to support reporting and approval requirements. You can effectively manage change orders and pay estimates with the automated processes in Masterworks. The preformatted forms allow you to easily create item postings and progress reports.

Document Management

The Masterworks Document Management System is a repository used to store and track documents in electronic form. It also stores scanned images of paper documents. This well-designed document management system allows you to organize and store content logically and hierarchically, in folders and subfolders, to ensure consistency across the enterprise. In addition, there is no restriction on the number or the size of documents that can be uploaded to Masterworks.

Checklists

In the multipurpose industry of construction, it is essential to perform a detailed and orderly check of activities at various stages, schedule them, and keep track of the progress of activities to ensure timely and correct execution of work. You can choose to predefine checklists in the Library and then reuse them in projects across processes or create new checklists.

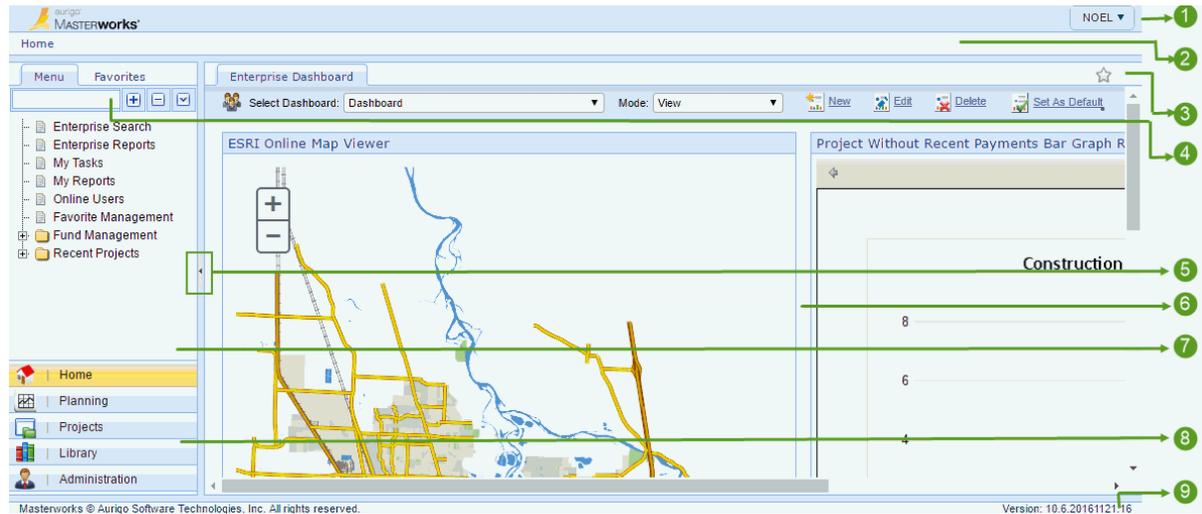
Easy Administration

The Masterworks Administration module is a true enterprise class feature, with tools to set up the Masterworks user interface and manage multiple users. It provides the administrator with complete control to define user access to the system, define user roles, and assign permissions to access the features of each module based on the role a user is assigned to in a project. In addition, the administrator can manage e-mail settings, report logos and modules, upload reports, and create workflows, forms, and user-defined fields.

4 Getting Started

4.1 Understanding the User Interface

This section describes the elements of the Masterworks user interface.



The user interface of Masterworks contains various elements that have been described below:

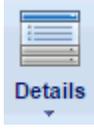
Number	Item	Description
1	Logo Area	The logo area displays the Masterworks logo. Your login user name is displayed. You can view your profile, change your application password, log out, and access the application online help. Note: The logout option is not available if Masterworks is configured for ADFS.
2	Page navigation links	The trail of page navigation links is displayed to track your location within the application.
3	Favorites	You can bookmark frequently used pages for easy and quick access from anywhere in the application.
4	Form Finder	Type the name of the form, or part of the name to easily find the form in the navigation pane.
5	Toggle button	Button to show, hide, and re-size application panes. Docking the left pane provides more space to view information in the right pane.

Number	Item	Description
6	Right Pane	Displays the work area for forms and modules.
7	Left Pane	Links to pages available in the module.
8	Module Menu	Buttons to access the various modules of Masterworks.
9	Status bar	Displays the copyright and version number of the application.

4.2 Common Screen Icons and Controls

The table below provides a quick reference of tasks that can be performed using common screen options and controls. Information available to users in the application is based on the roles assigned to the users, and the projects the users are invited to.

Tool bar options:

Term	Icon	Function
New		Creates a new record, For example a Project or a Contract.
Edit		Edits a record.
View		Views an existing record.
Delete		Deletes a record.
Copy		Creates a new form by copying specific information from a selected existing form.
Reports		Displays reports related to the particular module in which it is being viewed.
Details		View sub-records, copy, and paste records.

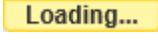
Term	Icon	Function
History	 History	View the workflow history of the selected record. Also lists the attachments added or linked to the record on a workflow transition.
Status	 Status	View the current workflow stage the form instance is in.
Reorder	 Reorder	Reorder items to move within the container or to other containers.
Refresh Line Number	 Refresh Line Number	Sets line numbers of items in a sequential order. Primarily used after deleting an item.
Modify Form	 Modify Form	Add fields to forms, modify fields, re-arrange fields, or remove fields. For additional information, refer <i>Administration, Form Builder</i> .
Customize List	 Customize List	Customizes the available columns in the list page <ul style="list-style-type: none"> • Select or clear column name to display or hide the columns. • Edit the Caption to change the display name of columns. • Hover over the column name, and then drag and drop the column to rearrange the columns.
Expression List	 Expression List	Creates new columns for the List page.
Flat List	 Flat List	Displays the items as a list with no grouping based on containers or groups.
Attachment		Indicates that the record in the list page contains an attachment.
Ball In Court	 Ball In Court	Routes the task to the specified user. An Email notification is sent to the user specifying the details of the task assigned. The list of users available to route the task to are users with Edit permissions to the form. For additional information on administrative tasks, refer <i>Administration</i> .

Term	Icon	Function
Change Log		View the following information, for each record in a form: <ul style="list-style-type: none"> • Addition of a record • Deletion of a record • Modification of record

Page navigation controls:

Control	Description
	Go to first page
	Go to previous page
	Current Page
	Pages
	Go to next page
	Go to last page

Others

Term	Icon	Function
Loading		Indicates that information in the page is loading. It is recommended that you perform any action on the page only after the loading icon disappears.

4.3 Modules

Masterworks consists of multiple modules that are independent of each other. Each module in Masterworks seamlessly integrates with the other modules to allow a user to manage a project throughout its life cycle.

Masterworks has four core modules. They are:

- Home

- Projects
- Library
- Administration

Home

The Home module is the landing page of the Masterworks application. This module provides you with shortcut links to perform key enterprise-level tasks and view enterprise-level reports. In addition, links to recently viewed projects are available on the left pane, and links to user-configurable dashboards are available on the right pane. You can also configure the display layout and add widgets of your choice to the dashboards.

Projects

The Projects module provides utilities to create and manage multiple projects in Masterworks. This module automates the entire process of managing projects through the project life cycle.

Library

Masterworks provides the Library module to store and manage catalogs of common, configurable, and reusable information. These catalogs are accessible to users when standard inputs are required to process various requests, orders, and bills while working in various operational modules of the system.

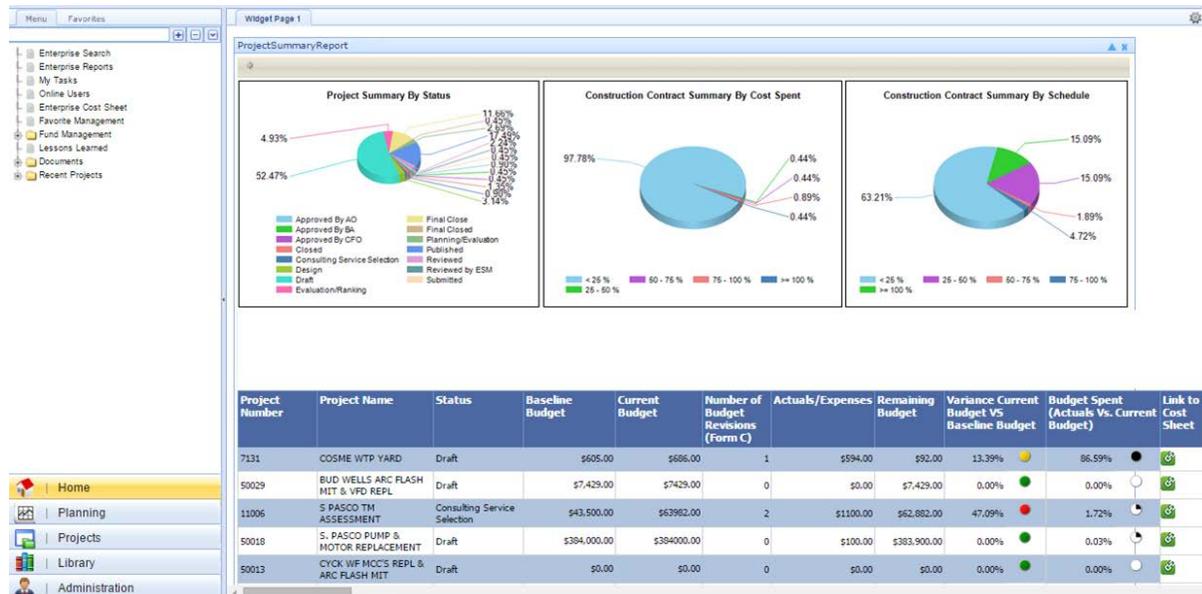
Administration

The Administration module can only be accessed by an administrator. This module provides utilities to configure application settings and manage modules, users, reports, workflows, and forms.

5 Enterprise

5.1 Enterprise Home

Enterprise Home displays navigational shortcuts with links, recently viewed records, and summaries of various modules in the application.



The Cost Manager section in the Enterprise Home page displays a list of all the projects in the enterprise and provides you with a preliminary view of the projects' cost and payments. The Cost Manager delivers real-time visibility into the financial status of all the projects in the enterprise.

The Cost Manager also provides Enterprise Level Cost Summaries and allows easy and quick drill down to Projects, Contract, and Item levels. You can view the cost sheet of a project and the contract summary report by expanding a project and then clicking the Current Budget value or the Payments value.

- **Enterprise Search** engine is available to search for project information within a module.
- **My Tasks** is used to view the pending tasks within a project.
- **Online Users** is used to view the list of users logged into Masterworks, the login time, the e-mail address of the user, and the IP address of the user's machine.
- **Favorite Management** is used to manage favorites.
- **Recent Projects** displays links to five projects recently opened by the logged in user.

5.2 Working with Dashboards

Dashboards provide a first-hand view of enterprise and project information configured to your choice. Dashboards can be configured and customized based on user requirements within the Enterprise module, and for individual projects. Dashboards can be configured with various presentation layouts. There is no limitation on the number dashboards you can create and use.

Information displayed in dashboards is based on the following:

- Role-based - Only selected information is displayed based on the roles assigned to the user.
- Project-based - Only information of projects the user is invited to is displayed.

Dashboard information is organized in various pre-defined layouts that are selectable. Web part zones are organized based on the layout selected. Widgets are added to these web part zones that display relevant information.

5.2.1 Configuring a Dashboard

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

Steps

1. In the **Enterprise Home** page, click **New**. 
The **New Dashboard** dialog box is displayed.
2. In the **Name** box, enter the name for the dashboard.
3. In the **Description** box, enter a brief description of the dashboard.
4. From the **Visible To** options, perform either of the following steps:
 - Click **Me** if the dashboard is only for your viewing.
 - Click **Roles** to enable other invited roles to view the dashboard. If **Roles** is clicked, then in the **Roles** box, type and select the role names that can view the created dashboard.
5. From the **Layout** options, click the required layout.
6. You can save the dashboard and later add widgets to the dashboard. Perform either for the following steps:
 - To save the dashboard and add widgets later, click **Save**. To add widgets to the dashboard, refer *Adding Widgets to a Dashboard*.
 - To save the dashboard and continue to add widgets click **Save & Design**. Perform the following steps:

- i. From the list of widgets in the **Catalog Zone**, select the widgets to add to the Web Parts.
For information on some available widgets, refer List of Widgets.
 - ii. From the **Add to** list, select the Web Part to which you want to add the widget.
 - iii. Click **Add**.
The page refreshes and the selected widget is added to the corresponding Web Part.
 - iv. Repeat steps i to iii to add more widgets.
 - v. In the **Catalog Zone**, click **Web Parts Catalog** to select and add Web Part widgets.
The **Web Parts Catalog** section is displayed.
 - vi. In the **Web Parts Catalog** section, select the required widgets.
 - vii. In the **Add to** list, select the Web Part zone to which you want to add the widgets.
 - viii. Click **Add**.
The selected widgets are added to the corresponding Web Part Zone.
You can continue to customize the added widgets. For information on customizing widgets, refer Customizing a Widget.
7. From the **Mode** drop-down box, select **View** to view the dashboard.

5.2.2 Adding Widgets to a Dashboard

Based on the user role, users can choose from a list of Widgets that can be added to the web part zones included in the layouts. Certain widgets allow drill-down options, and also can be toggled to view tabular or graphical representation of information.

Steps

1. In the module menu, click **Home**.
The Enterprise Dashboard is displayed.
2. From the **Select Dashboard** drop-down box, select the required dashboard to add a widget.
3. From the **Mode** drop-down box, select **Add Widgets**.
The page refreshes displaying the **Catalog Zone** dialog box.
4. From the list of widgets in the **Catalog Zone**, select the widgets to add to the Web Parts.
For information on some available widgets, refer List of Widgets.
5. From the **Add to** list, select the Web Part to which you want to add the widget.
6. Click **Add**.
The page refreshes and the selected widget is added to the corresponding Web Part.
7. Repeat steps i to iii to add more widgets.
8. In the **Catalog Zone**, click **Web Parts Catalog** to select and add Web Part widgets.
The **Web Parts Catalog** section is displayed.

9. In the **Web Parts Catalog** section, select the required widgets.
10. In the **Add to** list, select the Web Part zone to which you want to add the widgets.
11. Click **Add**.

The selected widgets are added to the corresponding Web Part Zone.

You can continue to customize information displayed in the added widgets. For information on customizing widgets, refer [Customizing a Widget](#).

5.2.3 Customizing a Widget

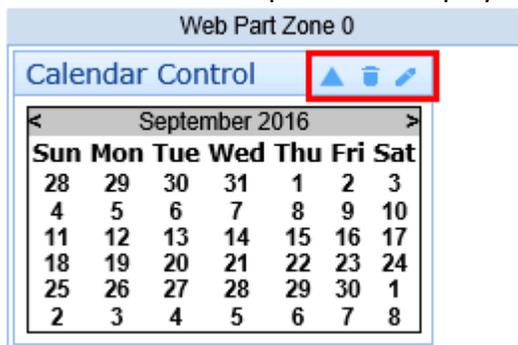
The properties of a Web Part are modifiable. Web part properties such as the layout, title, appearance, and change the project for which the catalog is displayed can be customized.

Prerequisites

- At least one widget is added to the dashboard

Steps

1. In the module menu, click **Home**.
The Enterprise Dashboard is displayed.
2. From the **Select Dashboard** drop-down box, select the dashboard that displays the required widget.
3. From the **Mode** drop-down box, select **Edit Widgets**.
The title bar menu options are displayed in the widget.



4. Click **Edit**. 
The **Editor Zone** is displayed.
5. Make the required changes in the **Editor Zone**.
6. Click **OK** to apply the changes and close the editor.
Or
Click **Apply** to apply the changes without closing the editor.

5.2.4 Modifying Dashboard Details

Steps

1. In the module menu, click **Home**.
The Enterprise Dashboard is displayed.
2. From the **Select Dashboard** drop-down box, select the required dashboard to view the dashboard.
3. In the dashboard toolbar, click **Edit**.
The Edit Dashboard dialog box is displayed.
4. Modify the required information.
For information on entering dashboard details, refer *Configuring a Dashboard*.

5.2.5 Setting a Dashboard as the Default

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

Steps

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



Note: *The option to set a dashboard as default is not available for the dashboard that is currently the default dashboard.*

5.2.6 Viewing a Dashboard

Steps

1. In the module menu, click **Home**.
The Enterprise Dashboard is displayed.
2. From the **Select Dashboard** drop-down box, select the required dashboard to view the dashboard.

5.2.7 Deleting a Dashboard

Steps

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

5.3 Using the Enterprise Search Utility

Enterprise Search is a search engine application to filter and view information from a large database of records. The search criterion is module based. You can filter data to suit your requirements based on the search criteria schema defined for a particular module.

Search results contain information of only those projects the user is invited to.

Steps

1. From the Masterworks Home page, click the **Enterprise Search** link.
2. From the **Search within** list, select a module within which you want to search for data or records.
The criteria fields relevant to the module appear.
Available forms in the list are forms with the Is Searchable form attribute set to True. For additional information on form attributes, refer *Form Builder, Creating a Form using Form Builder*.
3. Enter the required criteria to search.
4. Click **Search**.
The information that matches the criteria appears in the **Search Results** section. Search results contain information of only those projects the user is invited to.
5. The following options are available:
 - To save the search results to an Excel workbook, in the tool bar click **Export**.
 - To view a record, in the **Search Results** section, select the required record and then click **View**.
 - To clear existing search results to search with new criteria, click **Reset**.

5.4 Viewing Enterprise Reports

You can generate various enterprise level reports that comprise information of various projects. You can view selected information using filters, and generate reports in multiple report formats

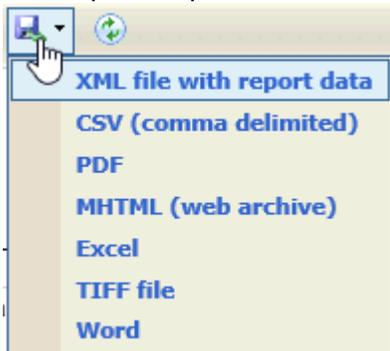
and print options. Availability of reports to generate and the information displayed in the reports are based on the roles assigned to the user, and the projects the user is invited to.

Prerequisites

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

Steps

1. In the module menu, click **Home**.
2. From the Enterprise Home page, click **Enterprise Reports**.
The **Report Gallery** page is displayed.
3. From the **Report Gallery**, double-click the required report.
4. Select the filter criteria to generate the report.
5. Click **View Report**.
The report is displayed.
6. To print the report or view the report in various other formats, click **Export**, and then click the required option.



For additional information on reports, refer *Common Application Features, Standard Report Functions*.

5.4.1 User Log-in Details Report

The User Log-in Details Report displays log-in details of users for a selected period.

Steps

1. From the Enterprise Home page, click **Enterprise Reports**.
The **Report Gallery** page is displayed.
2. In the right pane, double-click the **User Log-in Details Report**.
3. Select the users, the start date, and end date to generate the report.

4. Click View Report.
The User Log-in Details Report is displayed.

5.4.2 My Tasks Report

The **My Task Report** illustrates the various tasks per feature/module available in the product which is assigned to a user over a period of time.

This lists the tasks that are assigned to the user and requires action to be taken by the user in a project. The user can select different periods of time to search for the most recent to the older ones.

Steps

1. From the Enterprise Home page, click **Enterprise Reports**.
The **Report Gallery** page is displayed.
2. In the right pane, double-click the **My Tasks Report**.
3. Click **View Report**.
The **My Task Report** is displayed.

5.4.3 Project Funding Report

The **Project Funding Report** displays the funding information of all projects in the Enterprise. Information on Fund Type, Encumbered amount, and Allocated amount for all the projects are displayed.

From the **Enterprise Report Gallery**, double-click **Project Funding Report**. The **Project Funding Report** is displayed for the selected **Fund Category** and **Project Status**.

5.5 My Tasks

My tasks are implemented at the Enterprise, and Project levels. Tasks pending on you are listed in a page similar to a To-Do List. For example, if a pay estimate requires to be approved by you, then it the task is automatically listed in your My Tasks page.

To perform any task, the user role must be assigned the permissions to perform the task, and the user must be invited to the project.

Following are the locations where it is listed.

The Masterworks Home page:

The screenshot displays the Masterworks Enterprise Dashboard. On the left sidebar, the 'My Tasks' menu item is highlighted with a red box. The main dashboard area is titled 'Enterprise Dashboard' and shows a 'Project Status' dropdown menu. Below this, there are two charts: 'Project Summary By Status' and 'Project Summary By Cost'. The 'Project Summary By Status' chart is a 3D pie chart with the following data:

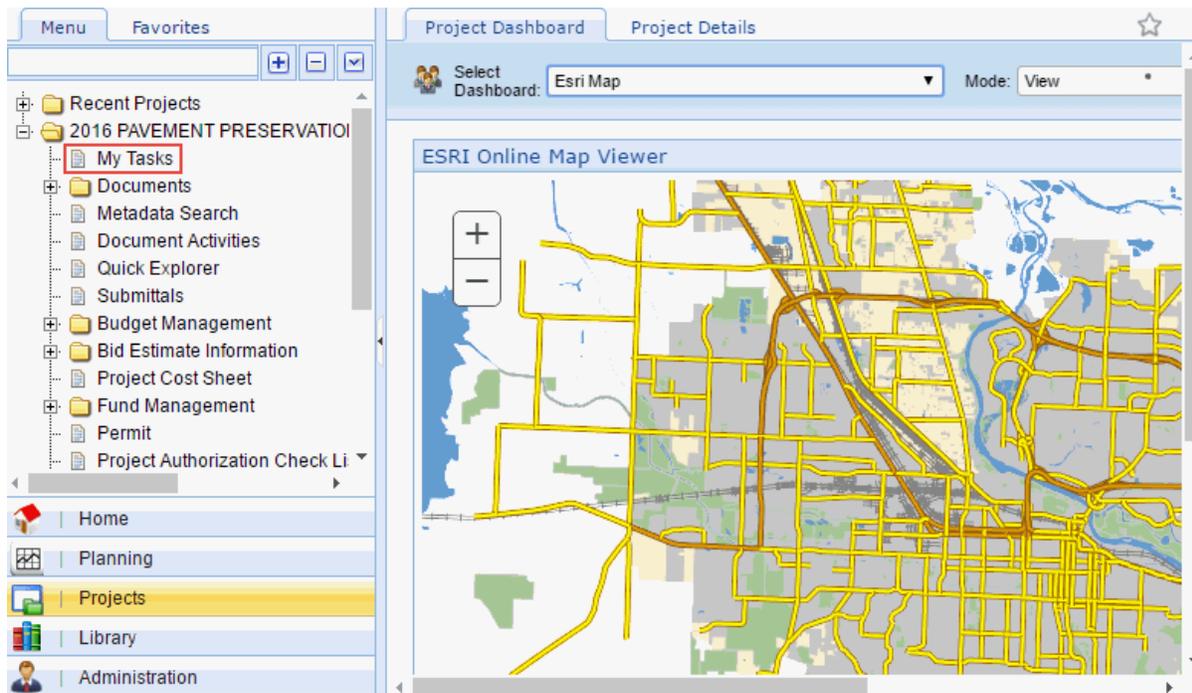
Status	Percentage
Advertisements	31.73%
Planning	26.97%
Construction	15.75%
Awarded	9.57%
Complete	8.10%
Design	6.46%
Others	1.42%

Below the charts is a 'To Do List' table with the following content:

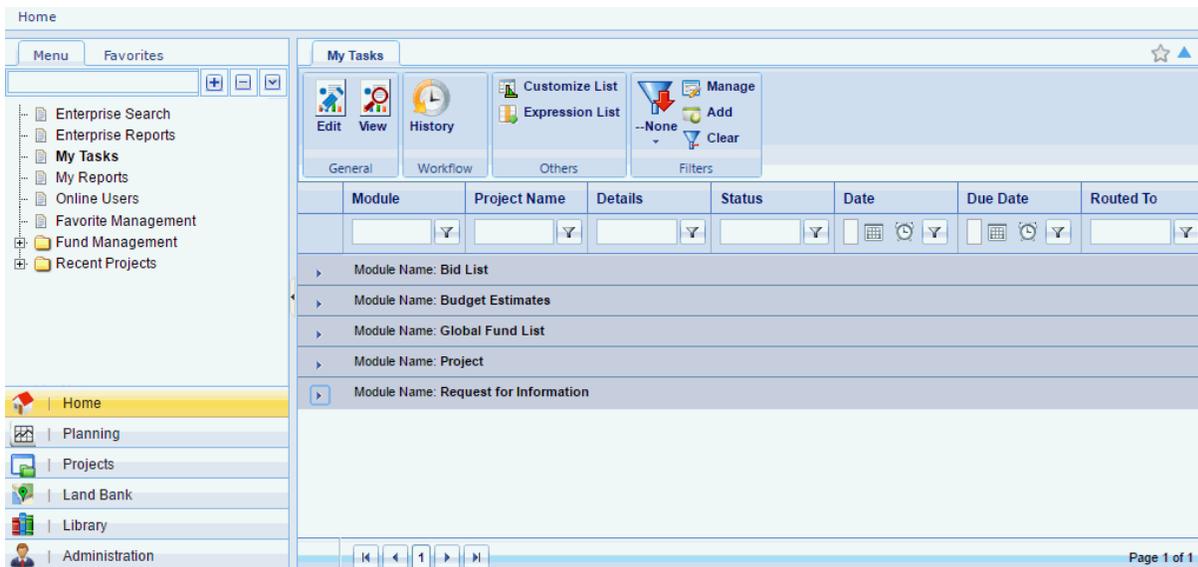
Project Name	Project Code
ModuleName: Bid List	
ModuleName: Budget Estimates	

Other dashboard elements include a 'Report Viewer' dropdown, a 'Google Map' showing Algeria, and a 'Home' button in the sidebar.

The Masterworks Projects folder:



The My Tasks page:



To view or edit the record, perform the following steps:

1. Expand the module, and then click the required record.
2. Click View to view the record.
Alternatively, click Edit to edit information in the record.

To enable a task to be updated in the My Tasks page, refer *Workflow Management, Working with Workflow Manager, Creating a Workflow*.

5.6 Accessing Frequently Used Pages

The Favorites Utility is used to bookmark selected forms for quick and easy access to open these forms in the application.

Steps

1. In the left navigation pane, click the **Favorites** tab.
The form bookmarks are displayed.
2. Click the required form.
The form is opened on the right pane.
For information on bookmark a form in the Favorites tab, refer

5.6.1 Managing Bookmarks

You can bookmark application forms to easy and quick accessibility. You can:

- Add a bookmark
- Edit a bookmark name
- Delete a bookmark
- Add a bookmark category
- Edit a bookmark category
- Delete a bookmark category

Steps

- To add a bookmark:
 1. From the left navigation pane, click the required form.
The form is displayed in the right pane.
 2. Click Add to favorites. 
 3. In the **Title** box, enter the name of the favorite link as must be displayed in the **Favorites** tab.
 4. Optionally, to categorize bookmarks, perform either of the following steps:
 - From the **Folder** drop-down box, select the folder to place the link in.
 - To create a new folder, select the **New Folder** check box, and in the **Folder** box, enter the name of the folder.
 5. Click **Add** to add the page bookmark to the **Favorites** tab.
The newly added favorite link appears under the **Favorites** tab on the left pane of the Masterworks application.

6. Click **Save**.
- To edit a bookmark name or category name:
 1. From the left navigation pane, click the required form.
The form is displayed in the right pane.
 2. Click Add to favorites. 
 3. Click **Manage Favorites**.
The **Favorite Management** page is displayed.
 4. Select the category, and then click **Edit**.
The bookmarks in the category are displayed.
 - To change the category name, in the **Category Name** box, modify the category name.
 - To modify the bookmark name:
 - i. In the **Favorite-Links** section, click the required bookmark, and then click **Edit**.
 - ii. In the **Link Title** box, enter the name the bookmark.
 - iii. Click **Save**.
 5. Click **Save**.
 - To delete a bookmark:
 1. From the left navigation pane, click the required form.
The form is displayed in the right pane.
 2. Click Add to favorites. 
 3. Click **Manage Favorites**.
The **Favorite Management** page is displayed.
 4. Select the category, and then click **Edit**.
 5. In the **Favorite-Links** section, click the required bookmark, and then click **Delete**.
 6. Click **Save**.
 - To delete a bookmark category:
 1. From the left navigation pane, click the required form.
The form is displayed in the right pane.
 2. Click Add to favorites. 
 3. Click **Manage Favorites**.
The **Favorite Management** page is displayed.
 4. Select the category, and then click **Delete**.
 5. Click **Save**.

6 Library Management

The Masterworks Library serves as a collection of catalogs to manage reusable data. Catalogs are where you create, define, and store reusable information that is used when you have to provide standard inputs to complete forms and information fields. With the Masterworks Library, you can store and manage catalogs of common, configurable, and reusable information.

For example, a catalog of all contractors are stored in the Masterworks Library. Information such as contractor name, and contractor contact details are stored in the Library. Only contractors added in the Library are selectable for projects. This ensures consistency in available information, and provides a standardization factor to ensure data integrity.

Adding items to all library catalogs are similar in procedure. Similarly, viewing, editing, and deleting items from all library catalogs are similar in procedure. However, certain library catalogs such as the Document Templates and Document Metadata catalogs work differently; and some such catalogs are described here.

6.1 Standard Library Functions

6.1.1 Adding Library Items

You can add library items to a catalog. You can also [concurrently import multiple library items](#) to a library catalog using a predefined template in a Microsoft Excel workbook.

Adding a Single Library Item:

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click a library catalog.
The items in the selected catalog are displayed.
3. Click **New**.
The page to create a new item is displayed.
4. Enter the required details of the item.
5. Click **Save**.

Adding Multiple Library Items:

You can import multiple library items to a library catalog using a predefined template in a Microsoft Excel workbook. The template to upload multiple items to the library catalog, or the

item list can be exported to a Microsoft Excel workbook. The Excel template workbook can be updated to list the library items for the catalog.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the library navigation pane, expand **LIBRARY**, and then click a library catalog.
The items in the selected catalog are displayed.
3. From the item list page, click **Excel Import / Export**, and then select **Excel Template Export**.
The item template is exported to an Excel workbook.
4. Save the exported Excel workbook to your local storage media.
5. Open the saved Excel workbook, enter details of the required library items, and their corresponding details.



Note: The RecordID column of the worksheet need not be filled. Record IDs are unique identification numbers that are autogenerated.

6. Save the Excel workbook with the library item information.
7. From the item list page, click **Excel Import / Export**, and then click **Excel Import**.
The **Import Details from Excel File** page is displayed.
8. Click **Browse** to select the workbook with library item information.
The **Choose File to Upload** dialog box is displayed.
9. Select the required workbook, and then click **Open**.
10. Click **Upload** to import library item information from the Excel workbook to the library catalog.
11. On encountering issues while importing an Excel workbook, perform the following steps:
 - a. In the toolbar, click **Error Log**.
The error log workbook is downloaded to your local storage.
 - b. Open the workbook to view the errors in the various tabs.
 - c. Make corrections in the Excel workbook for upload.
 - d. Repeat steps 7 to 11.
12. Click **Save**.
The items in the uploaded Excel workbook are uploaded to the library catalog.

6.1.2 Editing a Library Item

On editing an item in a Library catalog, the edited item will be available in its corresponding selection lists.

You can edit library item information if the item has not been used in any of the forms across the application. However, based on the configuration of a catalog, Masterworks does not allow you to edit library item information of that catalog if the item has been used in any of the Masterworks forms.

Steps

1. In the module menu, click **Library**.
The Library catalog page is displayed.
2. From the Library navigation tree, click a library catalog.
The items in the selected library catalog are displayed.
3. Select the required item from the list page.
4. Click **Edit**.
5. Make selective changes.
6. Click **Save**.

6.1.3 Viewing a Library Item

You can view a [summary of item details or complete details of a selected item on the application](#), or you can [download item information to an Excel workbook](#).

Steps

On the application:

1. In the module menu, click **Library**.
The Library catalog page is displayed.
2. From the Library navigation tree, click a library catalog.
The items in the selected library catalog are displayed.
3. To view complete details of a selected item, select the required item from the list page.
4. Click **View**.

Download to an Excel workbook:

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

2. From the Library navigation tree, click a library catalog.
The items in the selected library catalog are displayed.
3. From the item list page, click **Excel Import / Export**, and then select **Excel Export**.
The item details are exported to an Excel workbook.
4. Save the exported Excel workbook to your local storage media.
5. Open the Excel workbook to view item details.

6.1.4 Deleting a Library Item

On deleting an item in a Library catalog, the deleted item will be deleted from its corresponding selection lists.

You can delete a library item from a catalog if the item has not been used in any of the forms across the application. However, based on the configuration of the catalog, Masterworks does not allow you to delete a library item of that catalog if the item has been used in any of the Masterworks forms.

Steps

1. In the module menu, click **Library**.
The Library catalog page is displayed.
2. From the Library navigation tree, click a library catalog.
The items in the selected catalog are displayed.
3. Select the required item from the list page.
4. Click Delete.
The message Are you sure you want to Delete the selected records? is displayed.
5. Click **OK**.

6.2 Library Catalogs

Some Library catalogs that are configured differently from the standard catalogs. Catalogs in the Masterworks Library module are organized into folders. Additional information of a few library catalogs are described in the following sections:

- [Activities](#)
- [Stages](#)
- [Calendar](#)
- [Contact List](#)
- [Contractors](#)

- [Document Metadata](#)
- [Document Templates](#)
- [Measurement Systems](#)
- [Standard Items Tables](#)
 - [Creating a Standard Table](#)
 - [Adding Standard Items to Standard Table](#)
 - [Deleting a Standard Item](#)
 - Using Excel to Import and Export Item Details
 - [Importing and Exporting Standard Item Details](#)
 - [Exporting Standard Items from Item List](#)
 - [Importing Standard Items to Item List](#)
 - Editing a Standard Table
 - [Editing a Container Name](#)
 - [Editing a Standard Item](#)
- [Terms and Conditions](#)
 - [Pre-payment Types](#)
 - [Retention Rules](#)
 - [Pre-payment Rules](#)

6.2.1 Activities

Activities are a predefined set of tasks that must be carried out within a stage to manage a task.

A standard set of activity elements must be configured in the library to enable users to easily assign activities to a stage in a checklist that are required to be carried out to manage a task.

Masterworks allows you to attach relevant standard documents/forms that are associated with each activity within a stage while creating the checklist. This results in automatic attachment of all the required documents when a checklist that contains the stages and its activities is assigned to a task.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Activities**.
3. In the **Activities** page, click **New**.
The **Activities** page is displayed.

4. In the **Name** box, enter the name of the activity.
5. In the **Notes** box, enter the notes for the new activity.
6. Click **Save**.

6.2.2 Budget Templates

Budget templates are created to be associated with a budget estimate of a project to quickly define the set of budget items required to determine the project budget. On selecting a budget template during budget estimation, the associated items defined in the template are added to the budget estimate.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Budget Template**.
3. In the **Budget Template** page, click **New**.
4. In the **Budget Template Name** box, enter the name of the budget template.
5. In the **Description** box, enter the description for the budget template.
6. From the **Measurement System** drop-down box, select the measurement system for the budget template.
Available options are measurement systems defined in the **Measurement Systems** catalog of the Library.
For information on measurement systems, refer [Measurement Systems](#).
7. Click **Save**.
The **Budget Template** page is displayed.
8. To add items to the budget template, perform the following steps:
 - a. Select a budget template.
 - b. In the **Others** group, click **Items**.
 - c. To add a container or an item, perform either of the following steps:
 - o To add a container:
 - I. Click **New**, and then click **New Container**.
 - II. In the **Name** box, enter the name of the container.
 - III. Enter the description and notes for the new container.
 - IV. From the **Parent Container** list, click the container in which the current container must be available.

- o To add an item:
 - I. Click **New**, and then click **New**.
 - II. Provide the required information in the fields as described in the table.

Field Name	Description
Pay Item No.	<p>Enter the item number.</p> <p>Alternatively, to select an item from the Library, perform the following steps:</p> <ol style="list-style-type: none"> 1. From the Standard Item Table list, select the standard table where the item is defined. For availability of options in the list, standard item tables must be defined in the Standard Items Table catalog of the Library. For information on Standard Items List, refer <i>Library, Library Catalogs, Standard Items Table</i>. 2. Optionally, select the Ignore Containers of Standard Items check box to only select the item and not the item container. If the check box is selected, the item is added to the selected container. If the check box is cleared, the item and its container are added to the budget estimate. 3. Click Select to select an item from the specified standard items table. The item selection dialog box is displayed. 4. Click an item from the list, and then click Select. The Pay Item No., Description, Unit, Group, Accounting Code, and Unit Price in \$ are displayed. For availability of options in the list, standard item lists must be defined in the Standard Items Table catalog of the Library. For information on Standard Items List, refer <i>Library, Library Catalogs, Standard Items Table</i>.
Description	<p>Enter the description of the item.</p> <p>Item description is displayed automatically if you have selected the item from the Library.</p>
Unit	<p>Select the unit of measure for the item.</p> <p>The options available in the list are measurement units for the measurement system selected for the budget template.</p>
Accounting Code	<p>Enter the alphanumeric code assigned to the Item.</p> <p>Accounting code of the item is displayed automatically if you have</p>

Field Name	Description
	selected the item from the Library.
Unit Price in \$	Enter the cost per unit. The Amount in \$ field displays the total amount.
Notes	Any additional information relevant to the item.

- Optionally, attach or link relevant documents in the **Attachments** section.
For information on attaching documents, refer *Common Application Features, Attachments*.
- Click Save.

6.2.3 Contact List

The Contact List is a repository of details of personnel working for contractors. Information such as the contact name, e-mail address, telephone number is stored. The contact list is used in the Transmittals form. Contacts are categorized on the contractors they work for.

Steps

- In the module menu, click **Library**.
The **Library Management** page is displayed.
- In the Library navigation pane, click **Contact List**.
- In the **Contact List** page, click **New**.
The **Contact List** page is displayed.
- In the **Name** box, type the name of the new personnel.
- Enter the **Contact Number**, **Address**, and **Email ID** of the personnel.
- From the **Contractor** drop-down box, select the contractor for the personnel.
For availability of options in the Contractor list, contractors must be defined in the Contractors catalog of the Masterworks Library.
- Click **Save**.

6.2.4 Contractors

Contractors are the people who submit bids for items and if successful are given the contract to implement the project.

A large project can be contracted to multiple contractors; so, while creating a contract you must assign a prime contractor and sub contractors from the Contractors List. Therefore, it is imperative that a database of all registered contractors is maintained in the Masterworks Library module.



Note: Contractors not listed in the Masterworks Library cannot be assigned to a project.

A user with the privileges of an administrator can access and manage the Contractors list to add, edit or delete contractor details records.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Contractors**.
3. In the **Contractors** list page, click **New**.
The **Contractors** page is displayed.
4. Enter the **Name, Contact, ID** for the contractor.
5. Click **Save**.

6.2.5 Contractors

Contractors are the people who submit bids for items and if successful are given the contract to implement the project.

A large project can be contracted to multiple contractors; so, while creating a contract you must assign a prime contractor and sub contractors from the Contractors List. Therefore, it is imperative that a database of all registered contractors is maintained in the Masterworks Library module.



Note: Contractors not listed in the Masterworks Library cannot be assigned to a contract.

Steps

1. Click **Contractors** in the Library navigation tree to access the Contractors page.
2. From the **Contractors** list page, click **New**.
The **Contractors** page is displayed.
3. Enter the **Name, Contact, ID, Address 1, 2 and 3, City, State, Zip Code, Phone Number, Fax Number** and the **Email ID** for the contractor.
4. To assign an online bidder account, from the **Contractor Login ID** drop-down box, select the online bidder account.
For information on creating an online bidder account, refer *Administration, User Management, Creating Bidder Login Accounts for Online Bidding*.
5. From the **Type** drop-down box, select the type of contractor.
For availability of contractor type options, contractor types must be defined in the Contractor Type catalog of the Library.

5. Click **Save**.

6.2.6 Document Management

6.2.6.1 Document Metadata

Metadata is data about data that enable you to record additional information pertaining to documents that are managed in a project. Examples of metadata include:

- Version #
- Author
- Final Version Indicator
- Related URL
- Document Number
- Document Creation Date

Metadata information aid in managing projects, searching for related information, and otherwise simplifying business processes and reporting.

In Masterworks, all documents related to a project utilize the same metadata definitions. They are assigned when the project is created. The metadata definition to be used in a project must be selected before any document is uploaded to the document management subsystem.

Metadata specification can utilize library items (stored lists), text, numbers and various other information. Also, fields can be marked as mandatory or optional.

Masterworks allows for the definition of multiple metadata specifications. This allows to have different specifications to be used for different project types. For example, a complex project may mandatorily require certain fields, while a simple project may have certain fields as optional. A design project may have metadata that refers to the architect's numbering scheme to simplify communication, while a construction project may have metadata to identify the sub-contractor or contractor that provided the document.

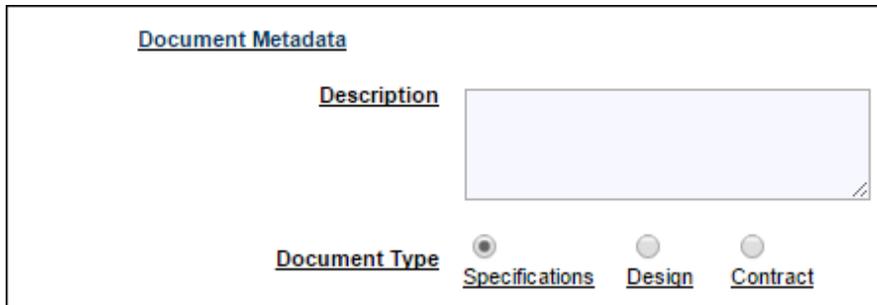
As all documents in a project are automatically associated with the corresponding project information (that is, information common to the project), project information would be redundant if specified as metadata.

Characteristics of metadata specifications include:

- Metadata specifications cannot be changed after the first document is uploaded.
- Metadata specifications are currently not applicable to attachments (in forms or workflows).
- Metadata specifications are consistent for a project.

The working of document metadata is similar to the functionalities available with the Form Builder in the Administration module. Refer *Form Builder* for additional information.

The following procedure describes the steps to create the following document metadata that is displayed when uploading a document to Masterworks. The metadata information consists of a text box to enter the document name, and a radio-button control to select the type of document.



The screenshot shows a web form titled "Document Metadata". It contains a "Description" label above a large text input field. Below the input field is a "Document Type" label followed by three radio button options: "Specifications", "Design", and "Contract". The "Specifications" radio button is selected.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Document Management**, and then click **Document Metadata**.
3. In the **Document Metadata** page, click **New**.
The **Design** and **Settings** tabs for the document metadata are displayed.
4. From the **Group Layout** list in the left pane, drag and drop **Section** into the center pane.
The label **Section 1** is displayed at the top left hand corner of the center pane.
5. Click **Section 1**.
The properties of the control are displayed in the right pane.
6. In the attributes of the section, Section 1, enter the following information:
 - **Caption:** This denotes the display name of the section just created. In this case, by default it is Section 1. To rename it, type the section label the **Caption** box. Type **Document Metadata** in this case.
 - **Name:** This is a system generated name to denote the section and need not be modified.
 - **Width:** This sets the width of the section. Normally for section controls the width field does not need to be set, rather the section sizes itself based on the controls that are contained within it. In certain circumstances it makes sense to set the width of a section.
 - **Attributes:** This is a section style attribute. We can incorporate any kind of formatting or font styles in here. For example, the following specifications will introduce a black border of thickness 1 pixel, underlined text of the caption and a left indent of 60 pixels within the frame.
Border: Solid 1px Black; text-decoration: underline; padding-left: 60px;



Note: Every new attribute is separated by a ";" and the attribute type and the attribute characteristic by a ":". Also, these attributes are standard HTML style attributes and are passed directly through to the web browser during form rendering. Modifying the attributes in this way should be done only when absolutely necessary to duplicate an existing user form look and feel.

- **Orientation:** Orientation can be Vertical or Horizontal depending on the requirement of the form. In a form a Section can contain other sections in a hierarchy. This is useful for organizing controls in columns. The Orientation attribute for a section causes the parent section to layout its child sections horizontally or vertically.
 - **Height:** This attribute is typically not set for sections, however, it can be used to cause a fixed height of a section when required.
7. Click **Apply** to notice the changes in the Section. The section is encircled with the black border and the underlined text as specified.
 8. To create a Text Box, drag and drop **Multi Line Text** from **Simple Input Controls** to within the limits of the section specified.
The control by default is always a text box with the **Caption** as **TextArea(num)** where **num** determines the number of the text box.



Note: Ensure that the cursor is released within the section boundaries or the control doesn't get placed in the form.

9. Click the text box control placed within the section. The text box attributes are displayed in the right pane.
10. Type **Description** in the **Caption** box.
11. Click **Apply** for the changes to take effect within the body of the form.
12. To specify the document type in the metadata, drag and drop **RadioButtonList** from **Simple Input Controls** within the section as before.
13. Click the radio button group, and the right pane of the window displays the attribute list.
14. In the **Caption** box, type **Document Type**.
15. In the ListItems box, type Specifications:Specifications;Design:Design;Contract:Contract.
16. Click **Apply**.
17. To modify form settings, click the **Settings** tab.
The 3 fields displayed in this page are:
 - **Form Id:** This determines the unique ID for the form. You can rename the form as per your requirement here by typing the name in the text box next to Form Id. It must be 7 alphanumeric characters.
 - **Header:** This denotes the text to be displayed as header to the form after being published. As earlier, this can also be modified.

- **Parent Module:** This determines the location where the XML form will be placed and is always selected as DOCMGMT.
18. To view the form attributes, click the **Design** tab, and then click outside the section area. The **Form Attributes** are displayed in the right pane.
 19. Click **Save**.
The metadata must be now published to be made available for selection in projects.
 20. From the **Document Metadata** page, select the metadata form to be published.
 21. In the **Others** group, click **Publish**.
The message **Form is published successfully** is displayed.
On creating a new project, the published Document Metadata can be selected. On adding a new document to the project, the metadata information is as displayed.

6.2.6.2 Document Templates

Document templates in the Masterworks Library enable you to [create predefined folder structures](#) and save them as templates. A document template can be then selected during project creation to automatically create the defined folder structure in the project. You can also [add files to these document templates](#) and have them available in projects with the selected template.

During project creation, on selecting a project template, files and documents added to the document template in the Masterworks Library are automatically included in the project document structure. For information on uploading a file, refer [Uploading a Document](#).

Multiple document templates can be created and saved in the Masterworks Library. Each of the templates can be structured differently and be used for various types of projects.

6.2.6.2.1 Creating a Folder Structure

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Document Management**, and then click **Document Templates**.
The **Document Templates List** page is displayed.
3. From the **Document Templates List** page, click **New**.
The **New** page is displayed.
4. In the **Document Template Name** box, enter the name of the template.
5. In the **Description** box, enter the description for the folder structure.

6. Click **Save**.
The **Documents Templates List** is refreshed with the new document template information. The folder structure for the template must now be defined.
7. From the **Document Templates List** page, select a document template, and then click **Settings** in the **Others** group.
The **Configure Document Template** page is displayed.
8. Click a folder in the **Document Folders** pane to create a folder within the selected folder.
9. Click **New Folder** in the **Folder** group to add a new folder to the document template. The added folder is displayed in the document template.
10. Enter the name for the folder.



Note: Duplicate folder names at the same level of hierarchy are not permitted.

11. Click a folder and click **Edit Folder** or **Delete Folder** to edit or delete the folder respectively.
12. Click **Back** in the **General** group to return to the **Document Templates List** page.
For additional information on using the various folder management features, refer *Folder Management*.

6.2.6.2.2 Adding Files to Template Folders

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Document Management**, and then click **Document Templates**.
The **Document Templates List** page is displayed.
3. From the **Document Templates List** page, click **New**.
The **New** page is displayed.
4. In the **Document Template Name** box, enter the name of the template.
5. In the **Description** box, enter the description for the folder structure.
6. Click **Save**.
The **Documents Templates List** is refreshed with the new document template information. The folder structure for the template must now be defined.
7. From the **Document Templates List** page, select a document template, and then click **Settings** in the **Others** group.
The **Configure Document Template** page is displayed.
8. Click a folder in the **Document Folders** pane to add a file.
9. In the **Document** group, click **New** to add a file to the selected folder.

10. Click **Browse** to select the file.
The **Choose File to Upload** dialog box is displayed.
11. Click the required file, and then click **Open**.
12. In the **Title** box, enter the name of the file.
13. Click **Save**.
The file is available in the **Documents** pane.
For additional information on using the various documentation features, refer [Updating a Document](#).

6.2.7 Equipment

The Masterworks Equipment catalog contains a list of equipment and the rate per unit of use or operation to determine the budget estimate of a project work item.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Equipment**.
3. In the **Equipment** page, click **New**.
4. In the **Resource Item ID** box, enter an identification number for the equipment.
5. In the **Description** box, type a brief description.
6. From the **Unit** drop-down box, select the unit of measure for the equipment usage.
Available units are all the units of measure defined the Measurement Systems catalog of the Library.
For information on Measurement Systems, refer [Measurement Systems](#).
7. In the **Rate** box, enter the price for usage of the equipment.
8. Click **Save**.

6.2.8 Forecast Calendar

The Forecast Calendar utility enables you to define a timetables for projects. The calendar is associated with projects to determine the is based on the calendar and the time type selected.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Program and Forecast**, and then click **Forecast Calendar**.

3. In the **Forecast Calendar** list page, click **New**.
The **Forecast Calendar** page is displayed.
4. In the **Name** box, enter a name for the calendar.
5. In the **Description** box, enter a description for the calendar.
6. In the **Month Wise Working Days** section, for each month, in the **No of Working Days** column, enter the corresponding number of working days.
7. Click **Save**.

6.2.9 Material

The Masterworks Material catalog contains a list of material and the rate per unit of use or operation to determine the budget estimate of a project work item.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Material**.
3. In the **Material** page, click **New**.
4. In the **Resource Item ID** box, enter an identification number for the material.
5. In the **Description** box, type a brief description.
6. From the **Unit** drop-down box, select the unit of measure for the material usage.
Available units are all the units of measure defined the Measurement Systems catalog of the Library.
For information on Measurement Systems, refer [Measurement Systems](#).
7. In the **Rate** box, enter the price for usage of the material.
8. Click **Save**.

6.2.10 Measurement Systems

Every contract item will have a measurement unit with which the item is counted or accounted.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Measurement Systems**.
3. In the **Measurement Systems** page, click **New**.
4. In the **System Name** box, enter the name for the measurement system.

5. In the **Description** box, enter the description for the new measurement system.
6. In the **Measurement Units** section, click **Add**.
The **New Measurements Units** dialog box is displayed.
7. In the **Unit** box, enter the measurement unit name.
8. In the **Description** box, enter the description for the measurement unit.
9. Click **Save**.
You can add more units, delete or edit the available units by clicking on the Add, Edit, Delete buttons respectively in the Measurement Units section.
10. Click **Save** to save the newly created measurement system.
The Measurement Systems page is refreshed with the newly created record.

6.2.11 Personnel

The Masterworks Personnel catalog contains a list of personnel and the charges for the personnel to determine the budget estimate of a project.

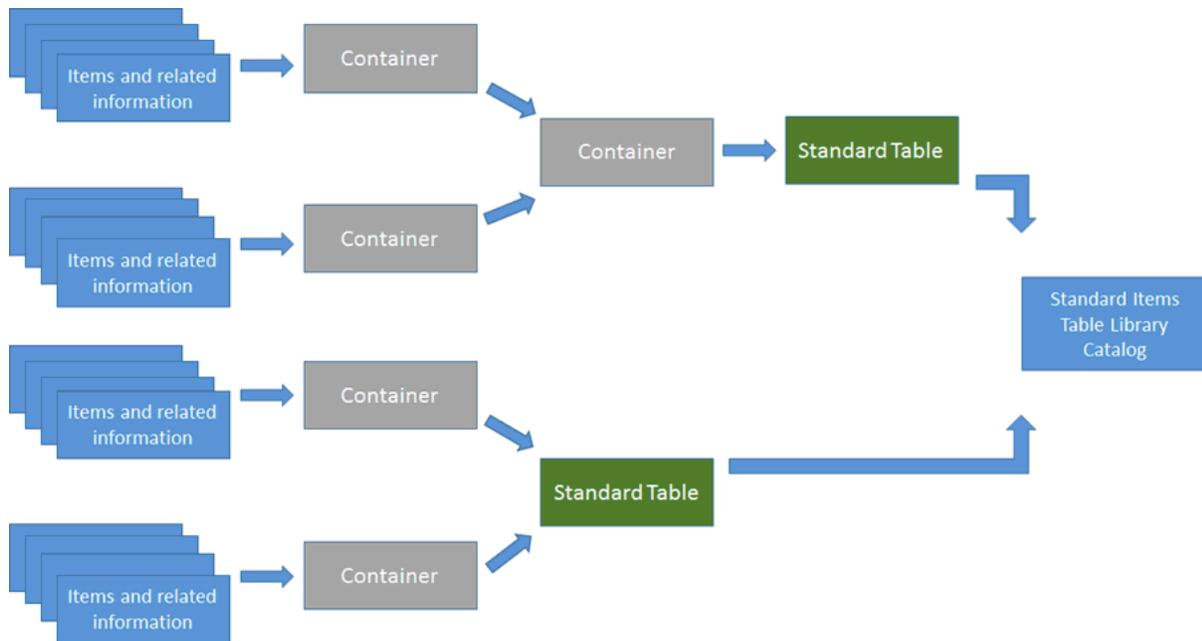
Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Personnel**.
3. In the **Personnel** page, click **New**.
4. In the **Resource Item ID** box, enter an identification number for the personnel.
5. In the **Description** box, type a brief description.
6. From the **Unit** drop-down box, select the unit of measure for the personnel.
Available units are all the units of measure defined the Measurement Systems catalog of the Library.
For information on Measurement Systems, refer [Measurement Systems](#).
7. In the **Rate** box, enter the charges for the personnel.
8. Click **Save**.

6.2.12 Standard Items Tables

The Standard Items Tables catalog is collection of standard tables comprising commonly used items and their related information such as their units of measure, estimated cost, and so on grouped hierarchically into containers. In the Masterworks Standard Tables, you can group items into containers. This enables you to easily categorize items into specific containers for

easy access and classification of work. You can create multiple such standard items tables and store them in the Library for use in multiple projects across the application.



6.2.12.1 Creating a Standard Table

A standard table is a collection of items stored in containers. For further categorization of items, items can also be associated to a group and sorted based on groups. When defining a standard table, the containers and groups standard items can be categorized into is also defined.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. In the **Standard Tables List** page, click **New**.
The **New Standard Table** page is displayed.
4. In the **Table name** box, type a name for the table.
5. From the **Measurement System** list, select a measurement system. For availability of options in the list, Measurement Systems must be defined in the Masterworks Library.
6. In the **Containers** section, click **Add** to add a container to the standard table.
A row is displayed in the Containers grid.
7. In the **Container Name** column, click a row and enter the container name.

8. In the **Container Description** column, click a row and enter the container description.
9. In the **Container Notes** column, click a row and enter notes for the container.
10. In the **Groups** section, click **Add** to add a **Scheduled Group** name to the Standard table.
A row is displayed in the **Groups** grid.
11. Click the row, and type the group name.



Note: If custom Containers or Scheduled Groups are not added, the system configures the table with Default Container and Scheduled Group.

12. Click **Save**.
You can now add items to the table.
For information on adding standard items, refer [Adding Standard Items to Standard Table](#).

6.2.12.2 Adding Standard Items to Standard Table

Standard Items must be added to the scheduled groups in the standard table to complete the process of creating standard tables for use across the application.

You can add items to a standard table in two methods:

- One item at a time.
- Multiple items concurrently.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. From the **Standard Tables List** page, select the standard table to add items.
4. In the **Others** group, click **Standard Items**.
The **Standard Item List** page is displayed.
5. Click **New**.
The **New Standard Item** page is displayed.
6. Provide the required information in the fields, as described in the table below:

Field Name	Description
Pay Item No.	Enter a unique identification number for the standard item.
Description	Enter the description of the Item.
Unit	From the list select the unit of measure for the item. Availability of measurement units are based on the Measurement

Field Name	Description
	System selected in the corresponding Standard Items Table.
Group	From the list, select the scheduled group for the Item. For information on creating scheduled groups, refer Creating a Standard Table .
Accounting Code	Enter the alphanumeric code assigned to the Item.
Container	From the drop-down box, select the container to group the item.
Component Count	<ol style="list-style-type: none"> a. Click Components to define item components. b. Click New to add an item component. c. In the Name box, enter the name of the item component. d. In the Description box, enter the description of the item component. e. Click Save.
Unit Price in \$	Enter the cost per unit.
Notes	Any additional information relevant to the Item.

7. In the **Attachments** section, upload related files to the item.
For information on attachments, refer Attachments.
8. Click **Save**.

6.2.12.3 Importing and Exporting Standard Item Details

Standard items or the standard items template can be exported to a Microsoft Excel workbook for easy usability and readability. On updating the workbook, the workbook can be imported back to Masterworks.

You can export Standard item details from the Standard Item List in a Microsoft Excel worksheet format, which can be imported into a different Standard Item List.

You can export the Standard Items table template in a Microsoft Excel worksheet format. A standard Item template is a predefined table schema for the standard items list. This template can be used to enter item details in the defined schema to create an item list, which can be imported into any other Standard Items List later on.

Standard items defined in the exported Microsoft Excel template workbook or the exported Microsoft Excel workbook can be updated and imported to Masterworks.

6.2.12.4 Exporting Standard Items from Item List

The standard items template or the standard items can be exported to a Microsoft Excel workbook.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. From the **Standard Tables List** page, select the required standard items table to export item information.
4. In the **Others** group, click **Standard Items**.
The **Standard Item List** page is displayed.
5. From the Standard Item List page, click Excel Import/Export.
6. Select either of the following:
 - **Excel Export** – Exports the items specified in the Standard Item List page.
 - **Excel Template Export** – Exports the template.
7. Save the Excel workbook.

6.2.12.5 Importing Standard Items to Item List

Standard items defined in the exported Microsoft Excel template workbook or the exported Microsoft Excel workbook can be updated and imported to Masterworks. The Excel workbook contains details of the containers, items, and components.

For information on the contents of the workbook, refer Using the Excel Workbook.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. From the **Standard Tables List** page, select the standard table to add items.
4. In the **Others** group, click **Standard Items**.
The **Standard Item List** page is displayed.
5. From the Standard Item List page, click Excel Import/Export.
6. Click Excel Import.
The Import Details from Excel File tab is displayed.

7. Click **Browse** to select the workbook with information contained in the Container, Item, and Components worksheets.
The **Choose File to Upload** dialog box is displayed.
8. Select the required workbook and click **Open**.
9. Optionally, select **Update** to update existing information.
10. Click **Upload** to import estimate information from the Excel workbook to the Standard Item List page.
11. On encountering issues while importing an Excel workbook, perform the following steps:
 - a. In the tool bar, click **Error Log**.
The error log workbook is downloaded to your local storage.
 - b. Open the workbook to view the errors in the various tabs.
 - c. Make corrections in the Excel workbook for upload.
 - d. Repeat steps 7 to 10.
12. Click **Save**.
The estimate items are uploaded to the **Standard Item List** page.
13. Click **Back** to view the **Standard Item List** page.

6.2.12.6 Editing a Container Name

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. From the **Standard Tables List** page, select the standard table to edit container information.
4. In the **Others** group, click **Standard Items**.
The **Standard Item List** page is displayed.
5. From the **Standard Item List** page, select a container.
6. Click **Edit**.
The **Edit Container** page is displayed.
7. Make the required change in the **Name**, **Description**, and **Notes** fields.
8. Click **Save** to update the container information.

6.2.12.7 Editing a Standard Item

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. From the **Standard Tables List** page, select the standard table to edit items.
4. In the **Others** group, click **Standard Items**.
The **Standard Item List** page is displayed.
5. In the **Standard Item List** page, click + to expand the container and view its **Items**.
6. Select a standard item that you want to edit.
7. Click **Edit**.
The **Edit Standard Item** page is displayed.
8. Make the required changes.
9. Click **Save**.

6.2.12.8 Deleting a Standard Item

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, click **Standard Items Table**.
3. From the **Standard Tables List** page, select the standard table to edit items.
4. In the **Others** group, click **Standard Items**.
The **Standard Item List** page is displayed.
5. In the **Standard Item List** page, perform one of the following steps:
 - Select the **Item Group Container(s)** to delete the container and its items.
 - Click + to expand the container to view, and select an item to delete.
6. Click **Delete**.
A confirmation message is displayed.
7. Click **OK**.

6.2.13 Terms and Conditions

Terms and Conditions are used to define advance payment rules and recovery rules in projects.

Terms and Conditions consist of the following 3 sub categories:

- Pre-payment Types
- Pre-payment Rules
- Retention Rules

6.2.13.1 Pre-payment Types

You can define various types of prepayments for prepayment rules used in projects for contract payment settlements.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Terms and Conditions**, and then click **Pre-payment Types**.
3. In the **Pre-payment Types** page, click **New**.
4. In the **Pre-payment Type** box, enter the name of the pre-payment type.
5. In the **Description** box, enter the description for the pre-payment type.
6. Click **Save**.
You can now create prepayment rules for use in projects.

6.2.13.2 Retention Rules

While generating the Pay Estimate if the owner requires retaining some amount for verifying the work done, then the Retention feature of the Pay Estimate module is used. To use the Retention feature of Pay Estimate, Retention Rule has to be defined in Terms and Conditions. Using Retention Rules we can define the amount of Retention that can be kept in a Pay Estimate and in a contract.

The Retention feature allows you to specify the retention percentage in the contractual terms and conditions and also specify the maximum amount that can be retained. The retained amount can be released in any Pay Estimate record during the course of the project. Adjustments amount is not considered in the retention calculations.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Terms and Conditions**, and then click **Retention Rules**.
3. In the **Retention Rules** page, click **New**.
4. In the **Retention Rule Name** box, enter the name for the retention rule.
5. In the **Description** box, enter the description of the retention rule.
6. In the **Notes** box, enter any notes for the retention rule.
7. In the **Retention (%)** box, enter the percentage of the payment that must be retained.

8. In the **Retention Ceiling Value** section, click **Percentage** to enter the retention ceiling value in percentage, or click **Amount** to enter the retention ceiling value as an amount.
9. If **Percentage** is clicked, then enter the retention ceiling value in the **Percentage** box. If **Amount** is clicked, then enter the retention ceiling value in the **Amount** box.
10. Click **Save**.

6.2.13.3 Pre-payment Rules

Using Prepayment Rules you can define the amount of prepayment that can be given in a contract.

Prerequisites

- Prepayment types are defined.

Steps

1. In the module menu, click **Library**.
The **Library Management** page is displayed.
2. In the Library navigation pane, expand **Terms and Conditions**, and then click **Pre-payment Rules**.
3. In the **Pre-payment Rules** page, click **New**.
The **New Pre-payment Rule** page is displayed.
4. In the **Pre-payment Rule Name** box, enter the name for the pre-payment rule.
5. In the **Description** box, enter the description of the pre-payment rule.
6. In the **Notes** box, enter any notes for the pre-payment rule.
7. In the **Mode** section, click the required option.
8. Enter the **Percentage** or the **Amount in \$** based on the selected **Mode**.
9. Click **Add**.
10. From the **Pre-payment Type** drop-down box, select the prepayment type.
For availability of options, prepayment types must be defined in the Pre-payment Types catalog of the Library.
11. Based on the selected mode, in the **Pre-payment Amount** or **Percentage(%)** box, enter the pre-payment value.
12. Based on the selected mode, in the **Recovery Amount** or **Percentage(%)** box, enter the recovery value.
13. Click **Save** to save the data.
The table is updated with the prepayment rule information..

14. Click **Save** in the **General** group.

The **Pre-payment Rules** page is refreshed with the newly created record.

7 Common Application Features

For enhanced ease of use, Masterworks is designed to provide a consistent look and feel across the application. Examples of factors that remain consistent across the application include page layouts, navigation menus, tool-bars and their menu options, buttons' position and labels, nomenclatures, icons, warning and error messages, report formatting, and so on. The general format, appearance, layout, usability and look and feel remain consistent across the application. In addition, certain features too are available throughout the application for ease of use. Features such as change logs, workflows, filters, report subscriptions, and so on are available across most forms of the application.

7.1 Standard Form Functions

Viewing, editing, deleting information, and generating reports from all forms is similar in procedure through out 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 Masterworks roles, refer *Administration*.

7.1.1 Adding a Form to the Project

If a module is not available in the project navigation pane, you can add the module to the project. Masterworks allows you to select appropriate modules that you require to manage a project.

Steps

1. Open the required project, and click the **Project Details** tab.
2. Expand **Modules**, and select the modules for the project.
3. If the required module is not available in the **Modules** section, then perform the following steps:
 - a. In the project navigation tree, expand **Construction Contract**, and then click **Contract Setup**.
 - b. Click the **Modules** tab.
 - c. Select the required modules.
4. Click **Save**.
The modules are added to the project.

7.1.2 Editing Form Details

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

Prerequisites

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

Steps

1. In the project navigation pane, click a form.
The selected form list page is displayed.
2. Select the required record from the list page.
3. Click **Edit**.
4. Make selective changes.
5. Click **Save**.

7.1.3 Viewing Form Details

Records can be viewed based on the workflow stage of the selected record. It may not be possible to view records in a particular stage depending on the workflow settings. Records can be viewed based on the roles assigned to the user.

Prerequisites

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

Steps

1. In the project navigation pane, click a form.
The selected form list page is displayed.
2. Select the required record from the list page.
3. Click **View**.
4. Click **Cancel** to return to the list page.

7.1.4 Deleting Form Details

Records in a list page can be deleted based on the workflow stage of the selected record. It may not be possible to delete records in a particular stage depending on the workflow settings. Records can be deleted based on the roles assigned to the user.

For example, it is not possible to delete a Contract Change Order record if the workflow stage of the Contract Change Order is set to Approved.

Prerequisites

- Required permissions to delete records
- Workflow stage allows record deletion
- Permissions to delete records in a particular workflow stage

Steps

1. In the navigation pane, click a form.
The selected form list page is displayed.
2. Select the required record from the list page.
3. Click **Delete**.
The delete confirmation message is displayed.
4. Click **OK**.

7.1.5 Importing Form Details from an Excel Workbook

You can create multiple form records by importing form information from a Microsoft Excel workbook to the form. The template to upload information of multiple records to a form in the application is downloaded as a Microsoft Excel workbook. The Excel template workbook is updated with the form information and is uploaded back to the application form.

Steps

1. In the navigation pane, click a form.
The selected form list page is displayed.
2. In the tool bar, click **Excel Import/Export**.
3. Click **Excel Template Export** to export the form template to an Excel workbook.
4. In the web page dialog box, click **Save** to save the workbook.
Alternatively, click **Open** to open the workbook.
5. Open the saved Excel workbook, enter form details in the various tabs, and save the updated Excel workbook.

6. From the list page, click **Excel Import/Export**.
7. Click Excel Import.
The Import Details from Excel File page is displayed.
8. Click **Browse** to select the workbook with updated form information.
The **Choose File to Upload** dialog box is displayed.
9. Select the required workbook, and then click **Open**.
10. Click **Upload** to import estimate information from the Excel workbook to the page.
11. On encountering issues while importing an Excel workbook, perform the following steps:
 - a. In the toolbar, click **Error Log**.
The error log workbook is downloaded to your local storage.
 - b. Open the workbook to view the errors in the various tabs.
 - c. Make corrections in the Excel workbook for upload.
 - d. Repeat steps 7 to 11.
12. Click **Save**.
The items in the uploaded Excel workbook are uploaded to the list page.

7.1.6 Exporting Form Details to an Excel Workbook

You can export information in a form record to an Excel workbook. Details of each section in the form is saved on an Excel sheet in the exported workbook. The workbook is named after the form name, and each worksheet is named the after the form section.

Steps

1. In the project navigation pane, click a form.
The selected form list page is displayed.
2. In the tool bar, click **Export**.
3. In the web page dialog box, click **Save** to save the workbook.
Alternatively, click **Open** to open the workbook.

7.1.7 Change Log

The Change Log feature enables you to view the following information, for each record in a form:

- Addition of a record
- Deletion of a record
- Modification of record information inclusive of the following:
 - Addition of information in record of a form

- Modification of information in a record of a form
- Deletion of information in a record of a form

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

Steps

1. In the project navigation pane, click the required form to open it.
2. In the tool bar, click **Change Log**.
3. Optionally, to filter displayed information, perform the following steps:
 - a. From the **Created/Modified By** drop-down box, select the user who performed the activity.
 - b. From the **Created/Modified from** drop-down boxes, select the time period in which the activity was performed.
 - c. From the **Operation** drop-down box, select the activity performed.
 - d. Click **Generate**.
Information filtered on the defined criteria is displayed.

7.2 Standard Report Functions

7.2.1 Viewing Reports

You can generate reports with different views for all the forms in Masterworks. You can generate reports with filtered information to view specific information. In addition to customized reports, two standard reports are available for all forms:

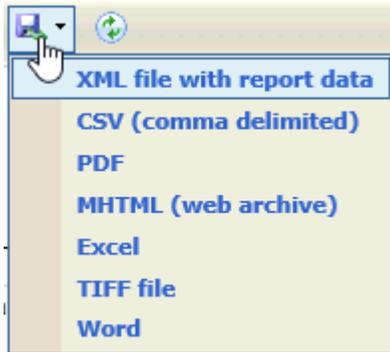
- List Page Report
Displays the list of all the records in the form.
- Details Report
Displays all the details of the selected form record.

You can subscribe to a report, and also [save a generated report in various formats](#).

Steps

- To generate a list page report, perform the following steps:
 - a. In the form list page, in the **Others** group, click **Reports**.
 - b. Click **List Page Report**.
- To generate a details report, perform the following steps:
 - a. In the form list page, select the required form record.
 - b. In the **Others** group, click **Reports**.

- c. Click **Details Report**.
- To view a report in a specific format, perform the following steps:
 - a. From the form list page, generate the required report.
 - b. To print the report or view the report in various other formats, click **Export**, and then click the required option.



7.2.2 Printing a Report

Steps

1. From the form list page, generate the required report.
2. To print the report, in the report toolbar, click **Print Report**. 

7.2.3 Updating Information in a Generated Report

Steps

1. From the form list page, generate the required report.
2. To update information in the report, in the report toolbar, click **Refresh**. 

7.2.4 Report Subscriptions

You can subscribe to reports and the subscribed reports are delivered to the specified e-mail addresses by e-mail, or to the specified file location. Subscriptions can be configured such that reports can be delivered periodically in the format as specified.

You can create multiple subscriptions for a single report with varied subscription options.

You can subscribe to a report by either of the following methods:

- E-mail

- File Share

Prerequisite

You must have access to the report. Before you can subscribe to a report, you must have permissions to view it.

Steps

1. Open a report, and then click **Subscribe**.
The subscription dialog box is displayed.
2. In the Please select the delivery option section:
 - Click **E-Mail** to deliver the report by e-mail.
 - Click **Windows File Share** to deliver the report to the specified folder.
3. If the selected mode of report delivery is:
 - **E-Mail**
 - i. In the **To** box, enter the e-mail addresses of the recipients of the report.
 - ii. In the **Reply To** box, enter the e-mail addresses of the recipients to which the reply e-mail must be delivered.
 - iii. In the **Subject** box, enter the name of the report or any other appropriate subject for the report.
 - iv. Select the **Include Report** check box to deliver the report in the selected format as an e-mail attachment.
 - v. Select the **Include Link** check box to deliver the link to the report in the report delivery e-mail.
 - vi. From the **Report Format** list, select the format the report must be generated and delivered to the specified e-mail addresses.
 - vii. From the **Start Date** list, click the date from which the report must be delivered.
 - viii. Select the **Stop this schedule on** check box, and then select the date up to which the report must be delivered.
 - **Windows File Share**
 - i. In the **File Name** box, enter the file name for the report.
 - ii. 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 of the report.
 - iii. In the **Path** box, enter the path of the shared file location where the report must be delivered.
 - iv. From the **Report Format** list, select the format the report must be generated and delivered.

- v. In the **Credentials used to access the file share** section, enter the credentials to access the shared location and save the report.
- vi. From the **Overwrite options** section, click any of the following options:

Option	Description
Overwrite an existing file with a newer version	On delivering the report 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	On delivering the report at the scheduled time, if a file with the same name exists, then the report must not be overwritten by the latest report.
Increment file names as newer versions are added	On delivering the report 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.

- vii. From the **Start Date** list, click the date from which the report must be delivered.
- viii. Select the **Stop this schedule on** check box, and then select the date up to which the report must be delivered.
4. Click the **Schedule Details** tab to set the frequency of report delivery.
5. From the delivery frequency options, click the appropriate option:

Option	Description	Steps
Hourly	The report is delivered every hour.	<ol style="list-style-type: none"> 1. Click Hourly in the delivery options list. 2. In the Run the schedule every: section, enter the frequency of report delivery: <ol style="list-style-type: none"> a. In the hours and minutes boxes, enter the time period in hours and minutes the report must be periodically delivered. b. In the Start time (hh:mm) enter the time in 24 hours format from report delivery must begin.
Daily	The report is delivered once daily.	<ol style="list-style-type: none"> 1. Click Daily in the delivery options list. 2. In the schedule definition section, enter the frequency of report delivery: <ul style="list-style-type: none"> ▪ Click Every Weekday to deliver the report on all week days, that is from Monday to Friday ▪ Click Repeat after this number of days, and

Option	Description	Steps
		<p>then enter the number of days in the box to deliver the report periodically once every specified number of days.</p> <p>3. In the Start time (hh:mm) enter the time in 24 hours format from report delivery must begin.</p>
Weekly	The report is delivered weekly.	<ol style="list-style-type: none"> 1. Click Weekly in the delivery options list. 2. Click Repeat after this number of weeks, and then enter the number of weeks in the box to deliver the report periodically once every specified number of weeks. 3. In the On day(s) section select the days on which the report must be delivered. 4. In the Start time (hh:mm) enter the time in 24 hours format from report delivery must begin.
Monthly	The report is delivered monthly.	<ol style="list-style-type: none"> 1. Click Monthly in the delivery options list. 2. Select the months when the report must be delivered. 3. Click one of the following options to schedule the delivery of the report: <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) <ol style="list-style-type: none"> i. 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 12th of February, and the calendar days set is 10, then the report is sent for 10 days from the 12th of every selected month. 4. In the Start time (hh:mm) enter the time in 24 hours format from report delivery must begin.
Once	The report is delivered once on	In the Start time (hh:mm) enter the time in 24 hours

Option	Description	Steps
	the current day.	format when the report must be delivered.

5. Click **Subscribe**.
The report is delivered as scheduled.



Note: Users with administration permissions can stop delivery of subscribed reports. For information on unsubscribing to reports, refer *Unsubscribing to Reports*.

7.2.5 Deleting Report Subscriptions

Delivery of subscribed reports can be stopped by deleting a subscription.

Prerequisite

- ☐ You can access to the Administration module with appropriate permissions to delete report subscriptions.

Steps

1. In the module menu, click **Administration**.
2. In the administration navigation pane, expand **Report Management**, and then click **Report Subscriptions**.
The **Report Subscriptions List** page is displayed.
3. Select a report subscription, and then click **Delete**.
The message **Are you sure you want to Delete the selected records?** is displayed.
4. Click **OK**.
The selected report subscription is deleted, and delivery of the report is stopped.

7.3 Using Form Filters

You can search for specific records that match criteria you provide. Records that match the criteria defined are displayed in the list page. You can also save pre-defined filters based on any search criteria.

You can search for records using either of the following modes:

- [Entering search criteria](#)
- [Using a pre-defined filter](#)

7.3.1 Entering search criteria

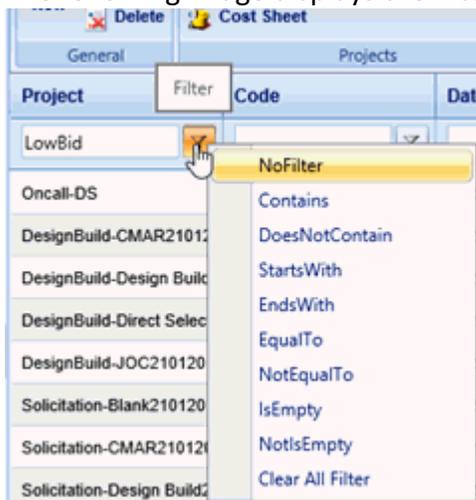
Steps

1. In the module menu, click **Projects**. The list of projects in the enterprise are displayed.
2. In the project navigation pane click any link to open the list page of the form.
3. Enter the search criteria in the filter text box in the required column.

4. Click **Filter**. 

Various filter options are displayed to filter information on the column.

The following image displays the filter options that can be selected.



5. Click the filter option for the specified filter criteria.

The following table describes the available filter options:

Filter Option	Description
No Filter	Removes the filter criteria in that column.
Contains	Displays records that contain the characters as specified in the criteria.
DoesNotContain	Displays records that do not contain the characters as specified in the criteria.
StartsWith	Displays records that contain the characters as specified in the criteria at the beginning of the column value.
EndsWith	Displays records that contain the characters as specified in the criteria at the end of the column value.
EqualTo	Displays records that match the characters as specified in the criteria.

Filter Option	Description
NotEqualTo	Displays records that do not match the characters as specified in the criteria.
IsEmpty	Displays records that do not have data in the column being filtered.
IsNotEmpty	Displays records that have data in the column being filtered.
Clear All Filter	Deletes filter criteria in all the columns and displays all records.

All records matching the criteria and the filter options selected for each of the columns are displayed.

7.3.2 Using a pre-defined filter

Steps

1. In the module menu, click **Projects**. The list of projects in the enterprise are displayed.
2. In the project navigation pane click any link to open the list page of the form.
3. In the **Filters** group, click **Filter**, and then click the required filter.



4. Click **More** to view more pre-defined filters.

For information on creating a filter, refer Saving a Filter.

7.3.3 Saving a Filter

You can pre-define and save filters for future use. Also, you can replace an existing filter with new search criteria.

- Pre-define and save filter
- Replace existing filter

7.3.3.1 Pre-define and save filter

Steps

1. In the module menu, click **Projects**. The list of projects in the enterprise are displayed.
2. In the project navigation pane click any link to open the list page of the form.
3. Enter the search criteria in the filters.
For information on entering search criteria, refer Using Form Filters.
4. In the **Filters** group, click **Add**.
The **Add New Filters** dialog box is displayed.
5. In the **Filter Name** box, enter the name of the filter.
6. Click **New** to create a new filter.
7. Select the **Is Default** check box to display records matching the search criteria defined in the filters on loading the page.
8. Click **Add**.

7.3.3.2 Replace existing filter

Steps

1. In the module menu, click **Projects**. The list of projects in the enterprise are displayed.
2. In the project navigation pane click any link to open the list page of the form.
3. Filter records in the list page.
For information on using form filters, refer Using Form Filters.
4. In the **Filters** group, click **Add**.
The **Add New Filters** dialog box is displayed.
5. Click **Replace**.
6. Select the **Is Default** check box to display records matching the search criteria defined in the filters on loading the page.
7. In the filter list, click the required filter.

8. Click **Add**.

The filter criteria of the selected filter is replaced with the new criteria defined.

7.3.4 Editing a Filter

You can modify the name of a filter.

Steps

1. In the module menu, click **Projects**. The list of projects in the enterprise are displayed.
2. In the project navigation pane click any link to open the list page of the form.
3. Enter the search criteria in the filters.
For information on entering search criteria, refer Using Form Filters.
4. In the **Filters** group, click **Manage**.
The **Manage List Filters** dialog box is displayed.
5. Click **Edit** in the row of the required filter.
6. In the **Filter Name** column, rename the filter.
7. Select the **Is Default** check box to display records matching the search criteria defined in the filters on page load.
8. Click **Update**.

7.3.5 Setting a Filter as the Default Filter

On an application page load, you can view records filtered on search criteria defined.

Steps

1. In the module menu, click **Projects**. The list of projects in the enterprise are displayed.
2. In the project navigation pane click any link to open the list page of the form.
3. In the **Filters** group, click **Manage**.
The **Manage List Filters** dialog box is displayed.
4. Click **Edit** in the row of the required filter.
5. Select the **Is Default** check box to display records matching the search criteria defined in the filters on page load.
6. Click **Update**.

7.4 Workflow Stage Transitions

A workflow automates a business process for approvals. Workflows comprise various stages, and each stage is approved by stakeholders of that stage. Stage transitions in workflows of forms and documents enable you to obtain approvals to complete a form's or a document's lifecycle defined in the workflow. Performing a workflow action on a form transitions the workflow stage. Workflow stage transition moves a record from its current workflow stage to the subsequent workflow stage based on the definition of the workflow.

For additional information on workflows, refer *Administration, Workflow Management*.

7.4.1 Workflow Stage Transitions for Forms

Workflow stage transition moves a record from its current workflow stage to the subsequent workflow stage based on the definition of the workflow.

Prerequisites

To perform a workflow stage transition, the following conditions must be true:

- You are a stakeholder for the particular stage in the workflow
- You are invited to the project
- Workflow action is pending on you

Steps

1. To perform a workflow stage transition, perform the either of the following steps:
 - On multiple records in the same current workflow, perform the following steps:
 - i. Select records that are in the same workflow stage, and are pending action on you.
 - ii. Under the **Workflow** group, click **Select Actions**, and then click the required workflow action.
The **Notes** window is displayed.
 - On a single record, perform the following steps:
 - i. Select a record from the form list page.
 - ii. Click **Edit**.
The details page of the selected record appears.
 - iii. Click the appropriate stage in the **Workflow** group.
The **Notes** window is displayed.

Note: *If the default workflow for the form does not get instantiated on creation of a record, a workflow must be attached to the record. For information on attaching a workflow to a record, refer *Attaching a Workflow to a Record*.*

2. Optionally, enter the **Notes**; and in the **Set Days To Complete for Next Stage** box, enter the number of days for completion of the current stage.
3. Optionally, attach or link relevant documents in the **Attachments** section.
You can access these documents from the Workflow History dialog box. For information on viewing the history of workflow transitions of the record, refer Workflow History.
4. Click **OK**.

**Note:**

- *Specific workflow stages cannot be reverted to the previous workflow stage. To check if a workflow state can be reverted, click **Status** in the list page.*
 - *Certain fields may not be available for entry or selection based on the current workflow stage of the record.*
 - *To select users to perform subsequent workflow stage transitions, refer User Selection in Workflow Stage Transition.*
-

7.4.2 Workflow Stage Transition for Documents

Workflow actions can be performed on documents to which a workflow has been associated.

Prerequisites

To perform a workflow stage transition, the following conditions must be true:

- You are a stakeholder for the particular stage in the workflow
- You are invited to the project
- Workflow action is pending on you

Steps

1. Select a record from the document list page.
Alternatively, you can select multiple records that are in the same current workflow stage, and are pending action on you.
2. In the **Workflow** group, click **Select Actions**, and then click the required workflow action.

The **Notes** window is displayed.
3. Optionally, enter the **Notes**; and in the **Set Days To Complete for Next Stage** box, enter the number of days for completion of the current stage.
4. Optionally, attach or link relevant documents in the **Attachments** section.
5. Click **OK**.

**Note:**

- Specific workflow stages cannot be reverted to the previous workflow stage. To check if a workflow state can be reverted, click **Status** in the list page.
- To select users to perform subsequent workflow stage transitions, refer User Selection in Workflow Stage Transition.

7.4.3 User Selection in Workflow Stage Transition

You can select users to perform current or subsequent workflow stage transitions for forms and documents. New users invited to the project can be associated to the workflow of existing forms and documents that are associated to the workflow. To remove a user from performing the current workflow stage transition, the user must not have performed the current workflow stage transition. These users must be invited to the project in a role that is a stakeholder for any workflow stage in the workflow.

For document folders in the document management module, user selection is at a folder level and is inherited to sub-folders and document records within it with an option to over-ride at sub-folder level and document record level.

This feature is permission based. For information on permissions, refer *Administration, Assigning Permissions to a Role*.

Steps

1. To select users for workflow stage transitions for the following:
 - A workflow for the module, or document folder:
 - i. From a list page, click **Workflow User(s)** in the **Workflow** group. 
The published workflows associated with the form are displayed as a list.
 - ii. From the **Available Workflows** list, select a workflow.
The **Workflow User(s)** table is displayed.
All records newly created inherit the saved user selections by default.
 - The workflow for a record:
 - i. Select a record, and then click **Workflow User(s)** in the **Workflow** group.
The **Workflow User(s)** page with the associated workflow of the record is displayed.
Only workflow stages that the record is to be transitioned to are displayed.
2. Select the users in each stage to specify that these selected users must transition the record to the next stage.
3. Click **Save**.
Based on the workflow definition, any or all selected users must perform the workflow action on the selected record.
The **Workflow History** page displays the workflow actions performed by all users across all stages of the workflow.

7.4.4 Attaching a Workflow to a Record

If the default workflow for a form does not get instantiated on creating a record, a workflow can be attached to the record. Or, if a workflow is newly defined for a form, the new workflow can be associated to records that have completed the workflow. You can attach a workflow to documents from the document list page of a folder, and documents searched using the *Document Search* utility.

Pre-requisites

- Workflow is not instantiated on the created record, and the Workflow Status of the record displays - N.A -.

OR

- A workflow previously attached to the record is complete, and there are no pending actions from any user or role.

Steps

1. In the project navigation pane, click a form.
2. Select records with the Workflow Status as - N.A -, or with the Pending On Role(s), and Pending On User(s) as None.
3. In the **Workflow** group, click **Attach Workflow**.
4. From the **Workflow** list, select the required workflow to be attached to the selected records.
5. Click **Attach**.
The workflow is attached to the selected records.
On completion of a previous workflow, when a workflow is attached again, the workflow history of the previous workflow is retained.

7.4.5 Workflow History

Obtaining progressive approvals for business processes are implemented using workflows. You can view the progression of a record in the workflow, the date the workflow action was performed, the action, the user name of the user who performed the workflow action, and the documents attached during workflow transitions.

Steps

1. From the list page select a record.
2. In the **Workflow** group, click **History**.
The **History** page is displayed with the associated details.

3. Click the file name in the **Document Name** column in the **Attachments** section to view the attachment.
4. Click **Show History in PDF** to view the report in printable format.

7.4.6 Workflow Stage Transition - Help

This feature enables you to view all the stages in a workflow.

Steps

1. From the list page, select the required records to perform the next workflow action.
2. In the toolbar, click **Workflow Help**.

7.4.7 Associating a Different Workflow

For any form of the project, you can associate a different workflow than the default workflow used across projects. This is done by clicking the Associate button under the Workflow menu group.

Steps

1. From the navigation pane, click a form to open.
2. Click **Associate** in the **Workflow** group.
The **Workflow Association** page is displayed.
It lists the **Default Workflow** and the **Workflow override for this page** under the respective options.
3. Select the required workflow from the drop-down list in the **Apply a new Workflow for this Listpage and Module** section.
4. Click **Apply** to save the changes.
The list page is refreshed and the workflow properties are associated within the form.
New records created for this form, for the project, are associated with the selected associated workflow.

7.4.8 Associating Workflow within New Documents

Document Management is a special form in the Workflow Definition page. Multiple workflows defined on this form can be published. In order to create a workflow for document management, you need to select “Document Management” in the drop-down list, while selecting the Associated Form.

Steps

1. Choose the project or the contract and then navigate to the document folder.
2. Click **Documents**, and then click **New**.
The **New Document** window is displayed.
3. In order to use a document workflow, create a new document in the **Documents** list page which is displayed under any project / contract nodes.
4. In the **Workflow** section, select **Associate the Below Workflow** and select a document workflow from the drop-down list.
5. Click **Save** to associate the existing workflow with the new document.

Once a document is associated with a workflow, editing the properties of the document is guided by the buttons in the workflow definition. To verify this, select the document again and click Edit in the menu to make changes and to progress it through the defined stages.

7.5 Attachments

7.5.1 Attaching a File to a Form

You can attach files to a form. You can also link a file in the document management folders to a form.

Steps

- To upload files to a form, perform the following steps in the **Attachments** section:
 - a. Click **Upload Document**. The **Choose File to Upload** dialog box is displayed.
 - b. To upload a single file, click the required file.
Alternatively, to upload multiple files, press CTRL, and then click the required files.
 - c. Click **Open**.
The files are uploaded to the form, and are displayed in the attachment grid.
 - d. In the **Title** column, enter the titles for the files attached.
- To link files in the Masterworks **Documents** folders to a form, perform the following steps:
 - a. In the **Attachments** section, click **Link Document**.
 - b. From the **Folder** drop-down box, select the required folder where the files exist.
The list of files in that folder are displayed.
 - c. From the list of files, select the required files.
 - d. Click **OK**.
The files are linked to the form, and are displayed in the attachment grid.
 - e. In the **Title** column, enter the titles for the linked files.

7.5.2 Accessing Attached Files

Files attached to a form can be accessed from the list page of the form.

Steps

1. From the navigation tree, click the required form.
The form list page is displayed.
2. In the tool bar, in the **Other** group, click **Attachments**.
The attachments of all the forms are listed.
Various document management features are available for attachments. For information on document management features, refer Documents.

8 Document Management

The Masterworks Document Management System is a repository used to store and track documents in electronic form. This well-designed document management system facilitates you to organize and store content logically and hierarchically in folders and sub-folders to ensure consistency across the enterprise. Also, there is no restriction on the number or the size of documents that can be uploaded to Masterworks.

The Masterworks Document Management System maintains a portfolio of various documents such as approved drawings, agreements, reports, records of implemented safety measures, project files, lists, site and construction images, and other project relevant documents. This module facilitates to store and manage attached and updated documents.

This module provides the features to store and manage documents related to each estimate, contract, or project. Additionally, the following features are available with the Masterworks Document Management System:

- Store and manage document versions in document folders.
- Secure documents by defining permissions on folders thus restricting user access.
- View a thumbnail display, or a slide show of the documents or images in a folder.
- Define and set workflows to documents for specific approvals.
- Create predefined document templates. Document templates are folder structures that can be selected while creating a project. The document template feature is a useful tool to customize folder design and layout for documents in an enterprise.
- Define and store additional metadata information on documents uploaded to the enterprise.
- Search for documents using the full-text search feature, or based on metadata.

8.1 Folder Management

Documents can be placed in folders for easy management of documentation. Folders can be created and structured hierarchically in the Documents folder of a project for easy access and an organized storage of documents.

8.1.1 Creating a Folder

Steps

1. From the project navigation tree, click **Documents**.
The **Documents** page is displayed.
2. In the **Folder** group, click **New**.
The **New Folder** page is displayed.

3. In the **Name** box, type the folder name.
4. In the **Description** box, type a brief description of the folder.
5. Click **Save**.
The folder is added to Documents folder.

8.1.2 Modifying Folder Properties

Steps

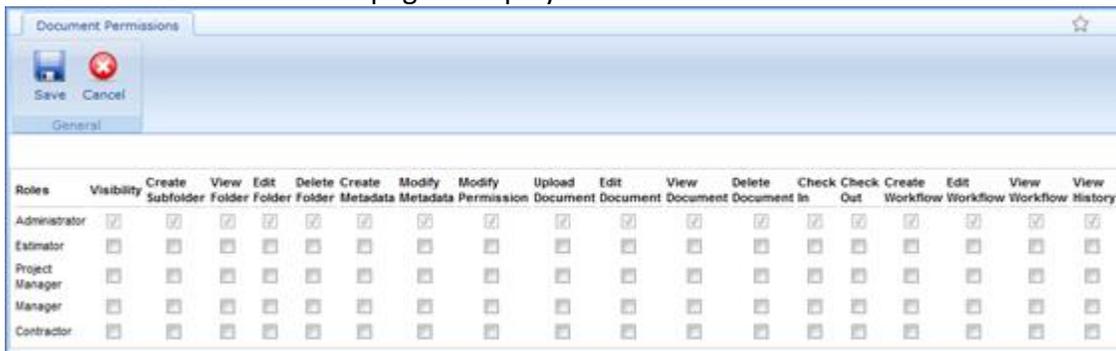
1. From the navigation tree, click and open a folder.
The document list of the folder is displayed.
2. In the **Folder** group, click **Edit**.
3. Make the required changes.
4. Click **Save**.

8.1.3 Setting Permissions to a Folder

You can control user access to folders in the document management system by providing specific 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. Expand **Documents** in the project navigation pane, and then click the folder to define access permissions.
2. In the **Folder** group, click **Permissions**.
The **Document Permissions** page is displayed as below.



The screenshot shows a window titled "Document Permissions" with a "Save" button and a "Cancel" button. Below the buttons is a "General" tab. The main area contains a table with the following columns: Roles, Visibility, Create Subfolder, View Folder, Edit Folder, Delete Folder, Create Metadata, Modify Metadata, Modify Permission, Upload Document, Edit Document, View Document, Delete Document, Check In, Check Out, Create Workflow, Edit Workflow, View Workflow, and View History. The rows represent different roles: Administrator, Estimator, Project Manager, Manager, and Contractor. Each cell in the table contains a checkbox, and all checkboxes are checked.

Roles	Visibility	Create Subfolder	View Folder	Edit Folder	Delete Folder	Create Metadata	Modify Metadata	Modify Permission	Upload Document	Edit Document	View Document	Delete Document	Check In	Check Out	Create Workflow	Edit Workflow	View Workflow	View History
Administrator	<input checked="" type="checkbox"/>																	
Estimator	<input type="checkbox"/>																	
Project Manager	<input type="checkbox"/>																	
Manager	<input type="checkbox"/>																	
Contractor	<input type="checkbox"/>																	

The roles available in the project form the rows of the permissions table and the associated rights the columns. You can assign role based permissions to document folders.

3. Select or clear the required check boxes to customize the permissions scenario on the folder.

4. Click **Save** to save the permissions.

The associated permissions to the selected folder are saved. A folder with access permissions to specific roles has the locked folder icon. 🔒



Note: You can also set folder permissions in the Administration module of Masterworks. Refer the Administration section for information on setting document folder permissions.

8.1.4 Deleting a Folder

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

Steps



Note: The default **Documents** folder cannot be deleted.

1. From the navigation tree, expand the documents folder.
The document list page of the folder is displayed.
2. In Folder group, click Delete Folder.
The message Deleting this folder will delete all the subfolders and documents under it. Do you want to continue? is displayed.
3. Click **OK**. The selected folder is deleted.

8.2 Document Management

Documents can be stored, and versions managed in the document folders. You can also associate workflows to documents to obtain specific approvals.

8.2.1 Uploading a Document

Upload documents, images, or other files, to folders organized for the project, in the Masterworks document management system. You can also add metadata information to each of the documents uploaded to the document management system. An uploaded document can also be associated with a workflow to obtain approvals. The My Tasks dashboard and the To-Do List report display the action you have to take if you are a stakeholder for the workflow.

Steps

1. In the project navigation pane, click a document folder or subfolder.
2. Click **New**.



Note: You can configure this page to display additional or other attributes by defining Document Metadata in the Masterworks Library, and selecting the corresponding document metadata for the project. For information on Document Metadata, refer [Document Metadata](#).

3. In the **Title** box, enter the document name.
4. Click **Select files**.
The **Open** dialog box is displayed.
5. Click the required document, and then click **Open**.
6. From the **Workflow** list, select the appropriate workflow to transition the document through the selected workflow to receive approvals from the stakeholder hierarchy.
7. Click **Save**.

8.2.2 Uploading Multiple Files

Multiple documents and files can be uploaded at once to the Masterworks document management system.

The two modes available to upload multiple documents simultaneously include the following:

- [Upload into a document folder](#)
- [Drag and drop into a document folder](#)

8.2.2.1 Uploading into a Folder

Steps

1. Expand the project folder in the project navigation pane, and click a document folder or subfolder.
2. Click **New** in the **General** group.
3. Click **Select files**.
The **Open** dialog box is displayed.
4. Press CTRL, and click the required documents, and then click **Open**.
The selected files are displayed.
5. From the **Workflow** list, select the appropriate workflow to transition the documents through the selected workflow to receive approvals from the stakeholder hierarchy.
6. Click **Save**.
The upload progress of the selected files is displayed, and then the list of documents in the folder is displayed with the **Workflow Status** of the documents as **New** based on the workflow selected or **NA** if no workflow is selected.

8.2.2.2 Drag and Drop Files into a Folder

1. In the project navigation pane, expand the project folder and then click **Document Activities**.
The **Document Activities** page is displayed.
2. From the **Folder** drop-down box, select the required Masterworks folder to upload the documents.
3. In the **Upload Document** section, click **Select Files**.
Alternatively, open the folder containing the documents.
4. Press CTRL, click the required files, and then drag and drop the selected files into the **Upload Document** section.
5. Click **Upload Files**.

8.2.3 Defining Metadata Information for Multiple Documents

Metadata information can be set for multiple documents at once using the Microsoft Excel Import feature of the Masterworks document management system. The process is to export the document names of all documents in a folder to an Excel worksheet, type the metadata information for all the documents, and then import the Excel worksheet to the same folder. The exported Excel worksheet contains metadata information fields as columns. Metadata information fields in an Excel sheet depend on the metadata selected for the project during project creation.

Steps

1. Click a document folder in the project navigation pane. The list of documents in the folder is displayed.
2. Click **Excel Import / Export** and then click **Excel Export**.
The names of all the documents in the folder, and metadata information fields are downloaded as an Excel worksheet to your Downloads folder.
3. Open the Excel worksheet, enter the metadata information for the documents, and then save the Excel worksheet.
4. Click **Excel Import / Export**, and then click **Excel Import**.
The **Import** page is displayed.
5. Click **Browse**.
The **Choose File to Upload** dialog box is displayed.
6. Select the exported and updated Excel worksheet containing metadata information, and then click **Open**.
7. Click **Upload**.
The upload success message is displayed.

8. Click **Back**.

The documents in the folder are updated with the metadata information as specified in the Excel worksheet.

8.2.4 Editing Document Properties

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

- Update document metadata
- Associate a workflow to the document
- Copy to the clipboard the link to download the document
- Copy to the clipboard the link to open the document in the viewer



Note: Document metadata information displayed in this page varies based on the document metadata selected for the project.

Steps

1. From the documents list page select a document.
2. Click **Edit Properties** in the **General** group.
The document properties are displayed.
3. Make the required changes.
4. Click **Save** to save the changes.

8.2.5 Updating a Document

Documents are checked out to incorporate any modifications to the existing file at any point in time. A checked-out document cannot be modified by other users to prevent overwriting and loss of information. The user name of the user who checked-out the document is displayed in the document list.

Documents wrongly checked out can be restored to their current version by choosing the Discard Check Out option. You can discard a check-out only before the document is checked-in.

On making modifications to a checked-out document, the document must be checked-in by the user who had checked out the document. On checking-in a document, document version number increments by 1.

Steps

1. From the documents list page select the required document.
2. Click **Check In/Out** in the **General** group, and then click **Check Out**.
The **File Download** box is displayed.

3. Click **Save** to save it to the local storage.
4. Make required modifications to the document, and save the document.
5. From the documents list page select the checked-out document.
6. Click **Check In/Out** in the **General** group, and then click **Check In**.
The **Check In Document** page is displayed.
- 7 Click **Browse** to select the modified document, and then click **Open**.
The version number of the document increments by 1.
For information on document versions, refer Managing Document Versions.

8.2.6 Managing Document Versions

You can maintain multiple versions of a document with an option to view or download any version.

Steps

1. From the documents list page select the required document.
2. Click **Version History** in the **General** group.
The **Version History** page is displayed with the date of creation.
3. Double-click a row in the **Version History** page to open the document version.
Alternatively, click  to download the corresponding document version to the local storage.

8.2.7 Downloading Documents

A copy of a document can be downloaded to your local storage from the Masterworks document management system. You can also download multiple documents and its associated child files as a package to your local storage.

You can download only documents to which you are permitted access.

Steps

1. Expand **Documents** in the project navigation pane, and then click the required folder.
2. Select a document.
Alternatively, from the list page of a project form, click **Attachments**, and click a document.
3. Click **Get Document**.
The **File Download** dialog box is displayed.
4. Click **Open** to open the document, or click **Save** to save the document on your local storage.
For information on downloading a document version, refer Version Control.

8.2.8 Viewing Documents

Various formats of documents can be viewed on the Masterworks application using the document viewer utility without having to install any document viewer applications on your system. You can view documents to which you are permitted access.

There are two methods to view a document on the document viewer:

With the Masterworks Quick Explorer:

1. In the project navigation pane, click **Quick Explorer**.
The list of all document folders, and the documents contained in the folders are displayed in the left pane of the **Quick Explorer** page. The document viewer is displayed in the right pane of the **Quick Explorer** page.
2. In the project navigation pane, expand a folder to view the documents in the folder.
3. Click a document in the left pane of the **Quick Explorer** page. The document is displayed in the right pane of the **Quick Explorer** page.

From the document list:

1. In the project navigation pane, expand **Document Management**, and then click the required document folder.
2. From the documents list page, select the document, and then click **View**.
Alternatively, double-click a document in the list. The document is opened in the document viewer.

8.2.9 Viewing Thumbnails and Slideshow of Documents

View reduced size images of pictures, and view a slideshow presentation of pictures in a folder using the Thumbnail or the Slide Show utilities of the Masterworks document management system.

Steps

1. From the project navigation pane, and click the required folder. The list of documents and files in the folder are displayed.
2. Click **Slide Show** to view a slide show presentation of images in that folder.
3. Click on the image to view the navigation pane at the bottom of the page.
4. Click **Close** to view the list page of the document folder. 
Or
Click **Next**  or **Previous**  to view the next image or the previous image.

5. Click **Thumbnail View** to view reduced size images of pictures in the selected folder.
6. Click **List View** to view the document list page.

8.3 Document Comment Log

A comment log for documents enables you to keep track of comments on documents. It enables you to request information on document and receive response. You can store information such as the initiator for the comment, the query, the response to the query, if the comment is complete, and so on.

8.3.1 Creating a Comment Log for a Document

Steps

1. From the project navigation tree, expand **Documents**, and then click the required folder. The documents list page is displayed.
2. Select a document from the documents list page.
3. In the **General** group, click **Comment Log**. The **Comment Log** page is displayed.
4. Click **Add** to insert a comment to the document.
5. Enter the **Comments**, and the **Reference Number** for the document.
6. Click **Save**.

8.3.2 Responding to a Comment

Steps

1. From the project navigation tree, expand **Documents**, and then click the required folder. The documents list page is displayed.
2. Select a document from the documents list page.
3. In the **General** group, and click **Comment Log**. The **Comment Log** page is displayed.
4. Select a comment log and click **Edit** to respond to a comment. The **Responded By** column is updated with the username of the logged in user. The **Responded On** column displays the response received date.
5. Enter the **Response** for the comment.
6. Select **Complete** to indicate if the comments are completely incorporated and have received response.
7. Click **Save**.

8.3.3 Deleting a Comment

Steps

1. From the **Comment Log** list page, select a comment created by you.
2. Click Delete.
The message Are You Sure You Want To Delete the selected records? is displayed.
3. Click **OK**.
The selected comment is deleted.

8.3.4 Comment Log Report

This report provides details on all the comments and their responses from the comment log for the selected document. The report is sorted such that the latest comment is displayed first.

8.4 Other Document Management Utilities

Document management in Masterworks also includes the following utilities:

- Using the Document Search Utility
- Using the Metadata Search Utility
- Archiving a Document

8.4.1 Using the Document Search Utility

A full text search can be performed to search for documents containing the specified criteria. The documents containing the specified search criteria are retrieved from the Masterworks Document Management System and are listed in a grid.

The document search utility has advanced search capabilities that include searching and retrieving documents based on search criteria such as:

- Containing specific words
- Exact work or phrase
- Not containing specific words
- File types
- Document creation date
- Project user who uploaded the file
- Document modified date
- Project user who modified the file
- Specific folders or sub-folders
- Document metadata selected for the project

Documents in the document management system, and documents attached to forms are searchable using the document search utility. Documents in folders that you have permission to are only displayed.

The following information on the searched document is displayed in the document search results table:

- Document name and title
- Uploaded by user, and date of upload
- File size, version, and type
- Checked-out to user
- Modification date and user
- Folder path of file location in the project document folder structure

Steps

1. Click **Document Search** in the project navigation pane.
2. Enter the text to be searched in the box, and click **Search**.
Or
For advanced search capabilities, click **Advanced Search**. The following page is displayed.
3. Specify additional search criteria, and then click **Advanced Search**.
The list of documents that correspond to the search criteria is displayed.



Note: *If you do not have access permissions to the document folder, the document will not be available in the search results.*

8.4.2 Using the Metadata Search Utility

You can filter and search for documents with specified search criteria. The documents containing the specified search criteria are retrieved from the Masterworks Document Management System and are listed in a grid.

The document search utility has search capabilities that include searching and retrieving documents based on search criteria such as:

- Project user who uploaded the file
- File name and description

Documents in the document management system, and documents attached to forms are searchable using the document search utility. Documents in folders that you have permission to are only displayed.

The following information on the searched document is displayed in the document search results table:

- File name and title
- Uploaded by user, and date of upload

- File size, version, and type
- Checked-out to user

Steps

1. Click **Metadata Search** in the project navigation pane.
2. Enter the text to be searched in the box, and click **Search**.
The list of documents that correspond to the search criteria is displayed.



Note: *If you do not have access permissions to the document folder, the document will not be available in the search results.*

8.4.3 Archiving a Document

You can archive documents to an automatically created Archive folder. On archiving a document, the document is moved to the Archive folder that is created the first time the Archive functionality is used.

Steps

1. Click the required folder under **Documents** in the project navigation tree.
2. Select the required documents from the documents list page.
3. Click **Archive**.
The selected documents are moved to the **Archive** folder.



Note: *The **Archive** folder is automatically created on the first instance of document archive.*

8.4.4 Moving a Document to a Different Folder

Move documents with ease to folders within the Masterworks document management system. Moving a document implies that the selected document is entirely moved to a new folder location. The current version of the document is moved to the new folder location with all the previous versions, metadata, comments, and workflow. On moving a document to a new folder, the document will no longer be available in the source folder, but will be available in the folder the document has been moved to.

Steps

1. Click the required folder under **Documents** in the project navigation tree.
2. Select the required documents from the documents list page.

3. Click **Document Operations**, and then click **Move**.
The **Move Document** page with the document folder structure is displayed.
4. Click the folder to which the documents must be moved to.
The selected files are moved to the selected folder.