COLLABORATION

PARTICIPANT GUIDE

PROGRAM AND PROJECT MANAGEMENT SYSTEM (PPMS)

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1 Introduction to Using the Participant Guide

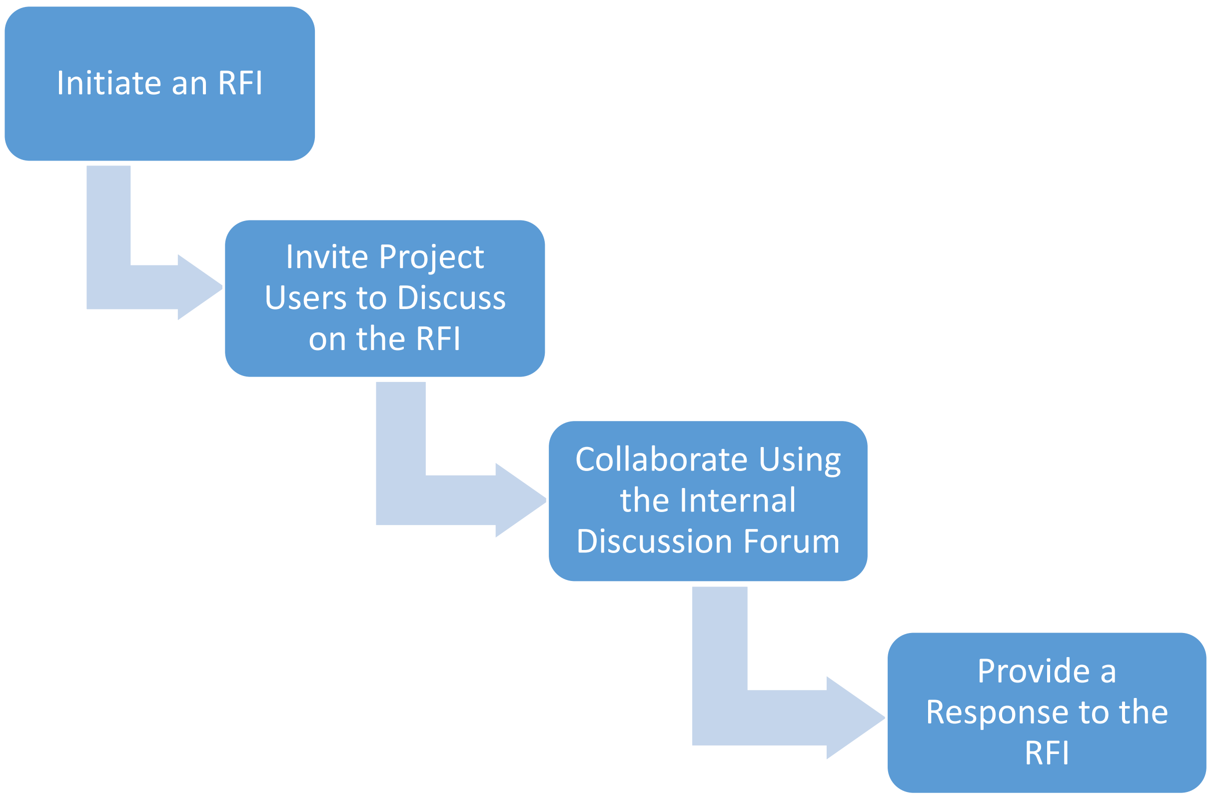
PPMS provides capabilities to capture Request for Information (RFI) and Submittals for a construction contract. The RFI form enables the contract stakeholders to raise questions and track clarifications to address gaps in information that may be found in any specifications, plans, contracts, or other documents. The Submittal form enables the contract stakeholders to record information of the design documents that are submitted to various subject matter experts who can review it and provide comments.

The Participant Guide helps you get started with the process of creating and managing RFI and Submittals for a construction contract.

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

2 Process Flow of Request for Information

The flow diagram illustrates the Request for Information process in PPMS:



3 Request for Information

The Request for Information (RFI) form is used as a formal mode of communication to record questions and track clarifications on information in any specifications, plans, contracts, or other documents.

You can perform the following tasks:

- Contractor can initiate an RFI with the queries listed with details and submit it to the owner
- Owner can view the queries and collaborate with other project users to arrive at a solution for the queries from the contractor
- Project users can collaborate using the Internal Discussions forum
- Owner can respond with clarifications to the contractor
- Obtain business decisions from various stakeholders

3.1 Initiating an RFI Form

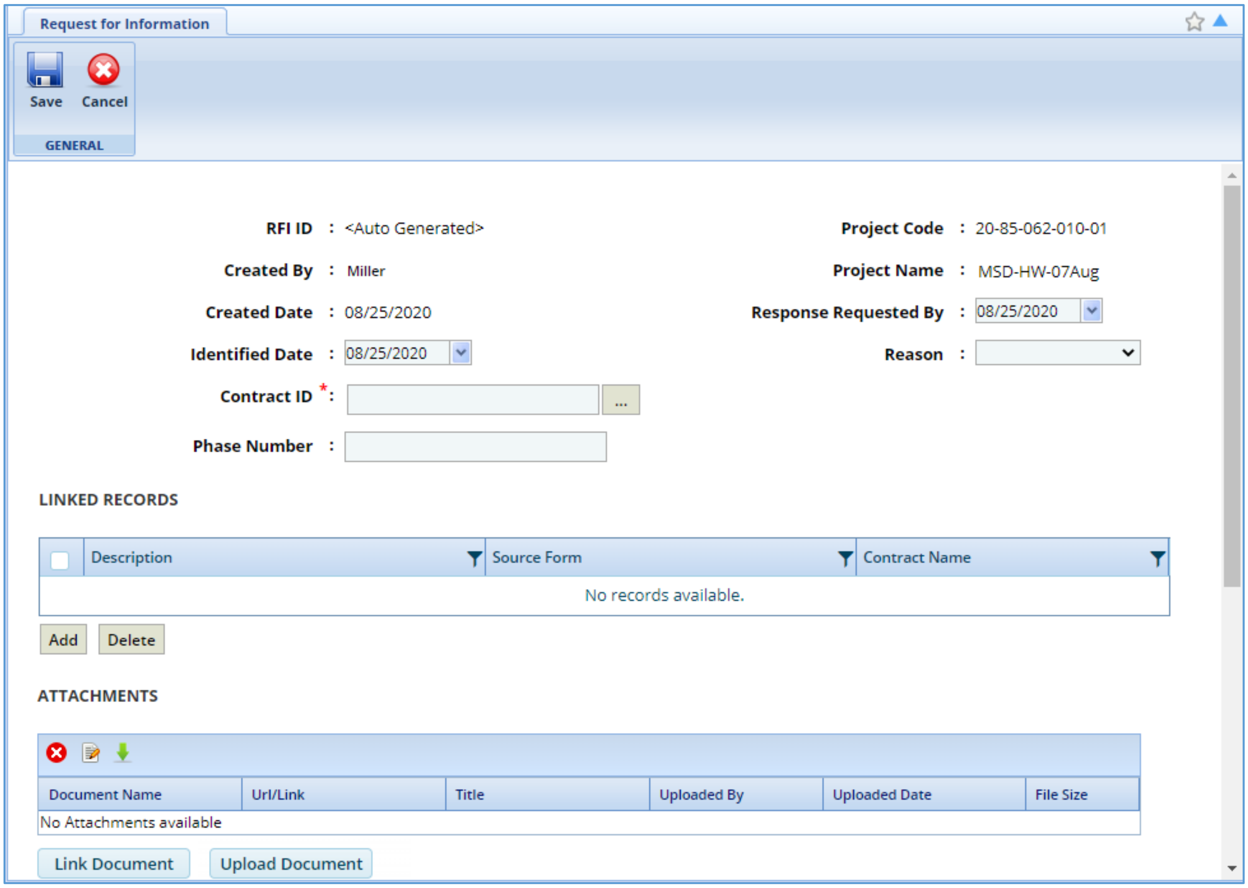
You can create an RFI form to request information or clarifications that addresses information requirements in any specifications, plans, contracts, or other documents.

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. In the navigation pane, click **Request for Information**.
   The **Request for Information** list page is displayed.

5. Click **New**.

   The **Request for Information** page is displayed.



The following information is displayed:

Field Name	Description
RFI ID	On saving the form, a unique identification code for the RFI record is automatically generated.
Created By	The user name of the logged in user.
Created Date	The current date.
Project Code	The identification code of the project for which the RFI form is being initiated.
Project Name	The name of the project for which the RFI form is being initiated.

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

Field Name	Description
Response Requested By	Select the date by when the response for the RFI form is required.
Reason	Select the reason for the initiation of the RFI form. Available options are reasons defined in the **RFI Reason** catalog of the library.
Identified Date	Select the date the requirement for information was identified.
Contract ID	To select the contract identification code of the contractor requesting the changes, perform the following steps: 1. Click .... The **Contract ID** dialog box is displayed. Available options are contract identification codes selected in the **Project Phases** forms associated with the project. 2. Click the required identification code, and then click **Select**. The **Phase Number** associated with the selected contract identification code is displayed.

7. To add references of records of forms in the project to the RFI form, in the **LINKED RECORDS** section, perform the following steps:
   a. Click **Add**.
      The **Select Items** dialog box is displayed.
   b. To select the required project form, in the **Source Form** box, click and select the required form.
      Alternatively, to select a contract form, perform the following steps:
      i. In the **Select Project / Contract** box, corresponding to the project name, click ×.
      ii. In the **Select Project / Contract** box, click and select the required contract.
      Alternatively, type the name of the contract, and then select the required contract.
      Available contracts are all the contracts the user is invited to in the project.
      iii. To select the required contract form, in the **Source Form** box, click and select the required form.
      Alternatively, type the name of the form, and then select the required form.
   c. Click **Search**.
      All the records of the selected form are displayed.
   d. Select the required records, and then click **Select**.
      The selected records are added to the **LINKED RECORDS** section.

***Note**: To view all the details of a linked record, in the **Description** column, click the required record.*

8. Optionally, in the **ATTACHMENTS** section, attach or link related files.
   For information on attachments, refer to Attachments.
9. To record queries, in the **REQUEST FOR INFORMATION** section, provide the required information in the fields, as described in the following table:

Field Name	Description
Subject	Enter the subject for the RFI to be addressed.
Priority	Select the priority for the RFI to be addressed.
Question/Clarifications Required	Enter the details of the query or clarification required.
Impact to Scope	Select the impact on the scope of the project if the RFI results in a scope change. Available options are **No Impact, High, Medium,** and **Low.**
Impact to Cost	Select the project cost impact associated with the RFI. Available options are **No Impact, High, Medium,** and **Low.**
Estimated Impact on Cost($)	If the selected **Impact to Cost** is **High, Medium,** or **Low**, then enter the approximate cost impact of the RFI.
Impact to Schedule	Select the project schedule impact associated with the RFI. Available options are **No Impact, High, Medium,** and **Low.**
Estimated Impact on Schedule(days)	If the selected **Impact to Schedule** is **High, Medium,** or **Low**, then enter the approximate schedule impact associated with the RFI.

10. To submit the RFI, in the **WORKFLOW** group, click **Submit Request**.
11. In the **Masterworks** dialog box, click **OK**.
    The **Request for Information** list page is displayed.
    The workflow stage of the RFI record is set to **Awaiting RFI Response**.

3.2 Collaborating with Stakeholders

Users invited to the project can be invited to discuss on the RFI submitted and to collectively formulate an adequate response for the queries raised by a contractor.

Prerequisite

- The RFI form is in the **Awaiting RFI Response** workflow stage.

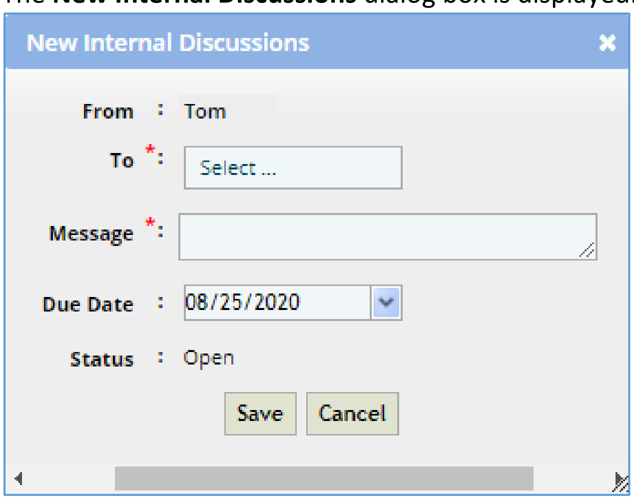
Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. In the navigation pane, click **Request for Information**.
   The **Request for Information** list page is displayed.
5. Select the required RFI form, and then click **Edit**.
   The **Request for Information** page is displayed.
   The following information is displayed:

Section	Field Name	Description
-	RFI ID	The automatically generated identification code for the RFI form.
	Created By	The user name of the user initiating the RFI form.
	Project Code	The identification code of the project for which the RFI form is being initiated.
	Project Name	The name of the project for which the RFI form is being initiated.
	Created Date	The date the RFI form was created.
	Identified Date	The date the requirement for information was identified.
	Contract ID	The contract identification code of the contractor requesting the changes.

Section	Field Name	Description
	Phase Number	The project phase number associated with the contractor requesting the changes.
REQUEST FOR INFORMATION	Subject	The subject of the RFI as entered by the contractor.
	Priority	The priority for the RFI as set by the contractor.
	Question/Clarifications Required	The questions or clarification as specified by the contractor.

6. From the **Response Requested By** calendar drop-down box, select the date by when the response for the RFI form is required.
7. From the **Reason** drop-down box, select the reason for the initiation of the RFI form. Available options are reasons defined in the **RFI Reason** catalog of the library.
8. To invite project users to discuss on the queries from the contractor, in the **INTERNAL DISCUSSIONS** section, perform the following steps:
    a. Click **Invite Users**.
    The **New Internal Discussions** dialog box is displayed.



    b. In the **To** box, click and select the required users to be invited to participate in the discussion. Available user details are users invited to the associated project.
    c. In the **Message** box, enter the required message.
    d. From the **Due Date** drop-down box, select the date to receive a response on the message.
    e. Click **Save**.
    The selected reviewers are added to the **INTERNAL DISCUSSIONS** section and the **Status** column displays **Open**.

f. To update the message or due date, corresponding to the required user, click in the **Message** column and update the message, or click in the **Due Date** column, click , and select the required date.

g. To post the message to the selected users, in the last column corresponding to the user, click .
Alternatively, to remove a selected user, in the last column corresponding to the user, click .

h. To undo a posted message, click .

9. To add references of records of forms in the project to the RFI form, in the **LINKED RECORDS** section, perform the following steps:

   a. Click **Add**.
   The **Select Items** dialog box is displayed.

   b. To select the required project form, in the **Source Form** box, click and select the required form.
   Alternatively, to select a contract form, perform the following steps:

      i. In the **Select Project / Contract** box, corresponding to the project name, click .

      ii. In the **Select Project / Contract** box, click and select the required contract.
      Alternatively, type the name of the contract, and then select the required contract.
      Available contracts are all the contracts the user is invited to in the project.

      iii. To select the required contract form, in the **Source Form** box, click and select the required form.
      Alternatively, type the name of the form, and then select the required form.

   c. Click **Search**.
   All the records of the selected form are displayed.

   d. Select the required records, and then click **Select**.
   The selected records are added to the **LINKED RECORDS** section.
   Note: *To view all the details of a linked record, in the* ***Description*** *column, click the required record.*

10. Optionally, in the **ATTACHMENTS** section, attach or link related files.
For information on attachments, refer to Attachments.

11. Click **Save**.
The messages posted in the **INTERNAL DISCUSSIONS** section are made available to the recipients to who it was posted.
The recipients can review the RFI and other discussions then provide a response. A user can only respond to discussions the user is invited to and not another user's discussion.

3.3 Responding to a Message

If a message is addressed to you, you can respond to the message, and close the message.

Prerequisite

- The user is invited in the **INTERNAL DISCUSSIONS** section of the RFI form.
- The **Status** column of the message displays **Open**.

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. In the navigation pane, click **Request for Information**.
   The **Request for Information** list page is displayed.
5. Select the required RFI form, and then click **Edit**.
   The **Request for Information** page is displayed.
6. To post a response to a message, in the **INTERNAL DISCUSSIONS** section perform the following steps:
   a. In the required message row, in the **Response** column, click and enter the response to the message.
   b. In the last column, click .
      The **Response Date column** displays the current date and the **Status** column displays **Closed**.
7. Click **Save**.

3.4 Responding to an RFI

Prior to responding to an RFI, you can collaborate with stakeholders using the Internal Discussion forum.

Prerequisite

- The RFI form is in the **Awaiting RFI Response** workflow stage.

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. In the navigation pane, click **Request for Information**.
   The **Request for Information** list page is displayed.

5. Select the required RFI form, and then click **Edit**.
   The **Request for Information** page is displayed.
   The following information is displayed:

Section	Field Name	Description
-	RFI ID	The automatically generated identification code for the RFI form.
	Created By	The user name of the user initiating the RFI form.
	Project Code	The identification code of the project for which the RFI form is being initiated.
	Project Name	The name of the project for which the RFI form is being initiated.
	Created Date	The date the RFI form was created.
	Identified Date	The date the requirement for information was identified.
	Contract ID	The contract identification code of the contractor requesting the changes.
	Phase Number	The project phase number associated with the contractor requesting the changes.
REQUEST FOR INFORMATION	Subject	The subject of the RFI as entered by the contractor.
	Priority	The priority for the RFI as set by the contractor.
	Question/Clarifications Required	The questions or clarification as specified by the contractor.

6. From the **Response Requested By** calendar drop-down box, select the date by when the response for the RFI form is required.
7. From the **Reason** drop-down box, select the reason for the initiation of the RFI form.
   Available options are reasons defined in the **RFI Reason** catalog of the library.

8. To provide responses to the RFI, in the **REQUEST FOR INFORMATION** section, provide the required information in the fields, as described in the following table:

Field Name	Description
Response/Clarification	Enter the responses for the queries from the contractor.
Impact to Scope	Select the impact on the scope of the project if the RFI results in a scope change. Available options are **No Impact, High, Medium,** and **Low.**
Impact to Cost	Select the project cost impact associated with the RFI. Available options are **No Impact, High, Medium,** and **Low.**
Estimated Impact on Cost($)	If the selected **Impact to Cost** is **High, Medium,** or **Low**, then enter the approximate cost impact of the RFI.
Impact to Schedule	Select the project schedule impact associated with the RFI. Available options are **No Impact, High, Medium,** and **Low.**
Estimated Impact on Schedule(days)	If the selected **Impact to Schedule** is **High, Medium,** or **Low**, then enter the approximate schedule impact associated with the RFI.

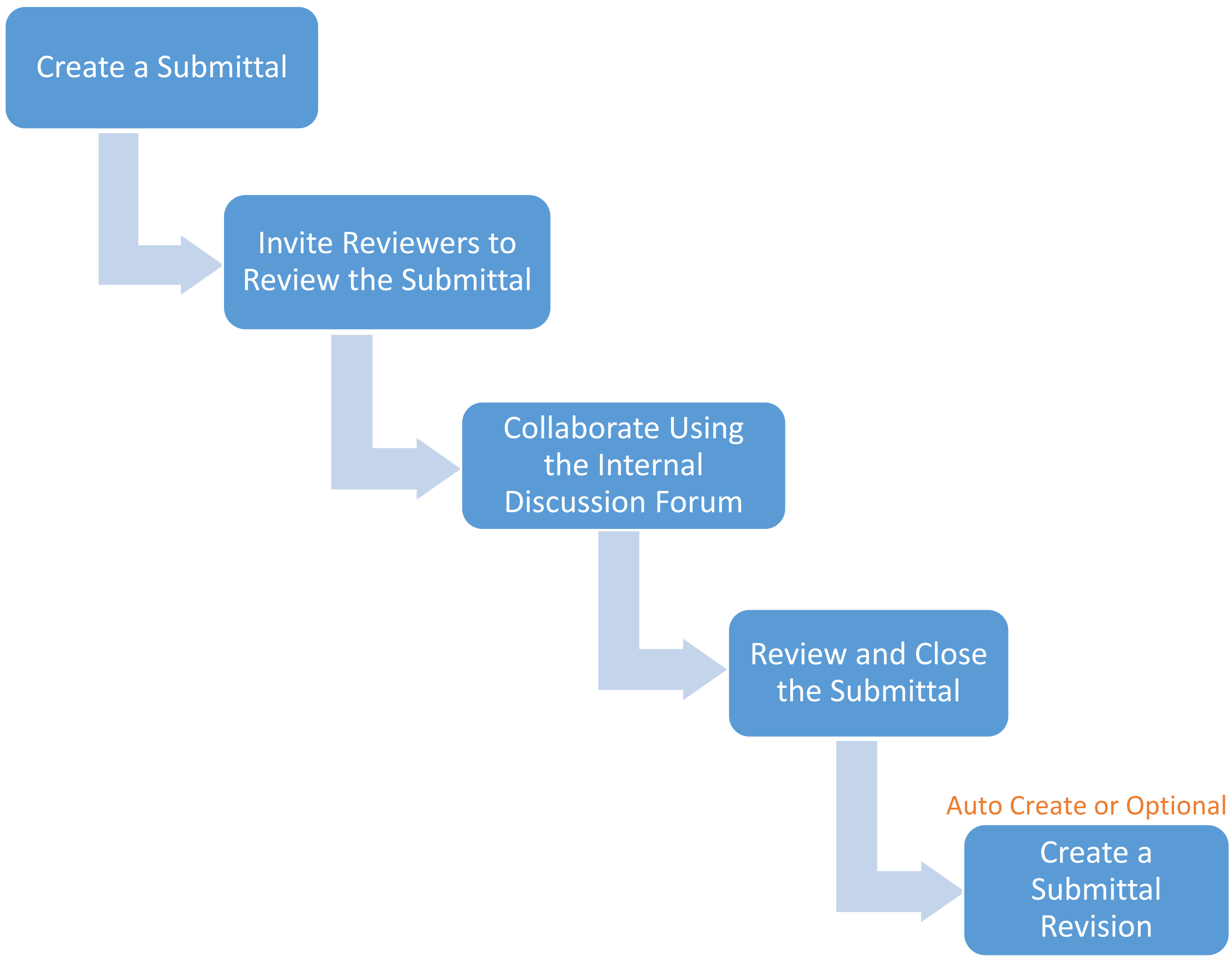
9. To respond to the RFI initiated by the contractor, in the **WORKFLOW** group, click **Send Response**.
10. In the **Masterworks** dialog box, click **OK**.
    The **Request for Information** list page is displayed.
    The workflow stage of the RFI record is set to **Response Received**.

3.5 Request for Information Workflow Stages

Phase	Current Workflow Status	Stakeholders	Action	Subsequent Workflow Status	Business Rules
1	Draft	• Contractor User	Submit Request	Awaiting RFI Response	At the **Awaiting RFI Response** stage, you can invite project users to collaborate and discuss on the RFI. At the **Submitted** stage, you can provide a response to the RFI.
2	Awaiting RFI Response	• Project Manager • RCE	Send Response	Response Received	-
3	Response Received	• Contractor User	Re-Submit Request	Awaiting RFI Response	-
			Mark RFI Closed	Closed	-

4 Process Flow of Submittals

The flow diagram illustrates the Submittals process in PPMS:



5 Submittals

A submittal is a document or samples provided by subcontractors to the general contractor, or by the general contractor to the owner for approval of the design, equipment, materials, and so on.

In PPMS, relevant documents are attached to a submittal form and then processed for approvals from stakeholders.

This feature enables you to:

- Create submittals and categorize them based on the types.
- Attach documents that are required for a submittal type.
- Track transmittals that were submitted.
- Maintain a history of all correspondence for every submittal.
- Manage reviews and approvals using workflows.

You can perform the following tasks:

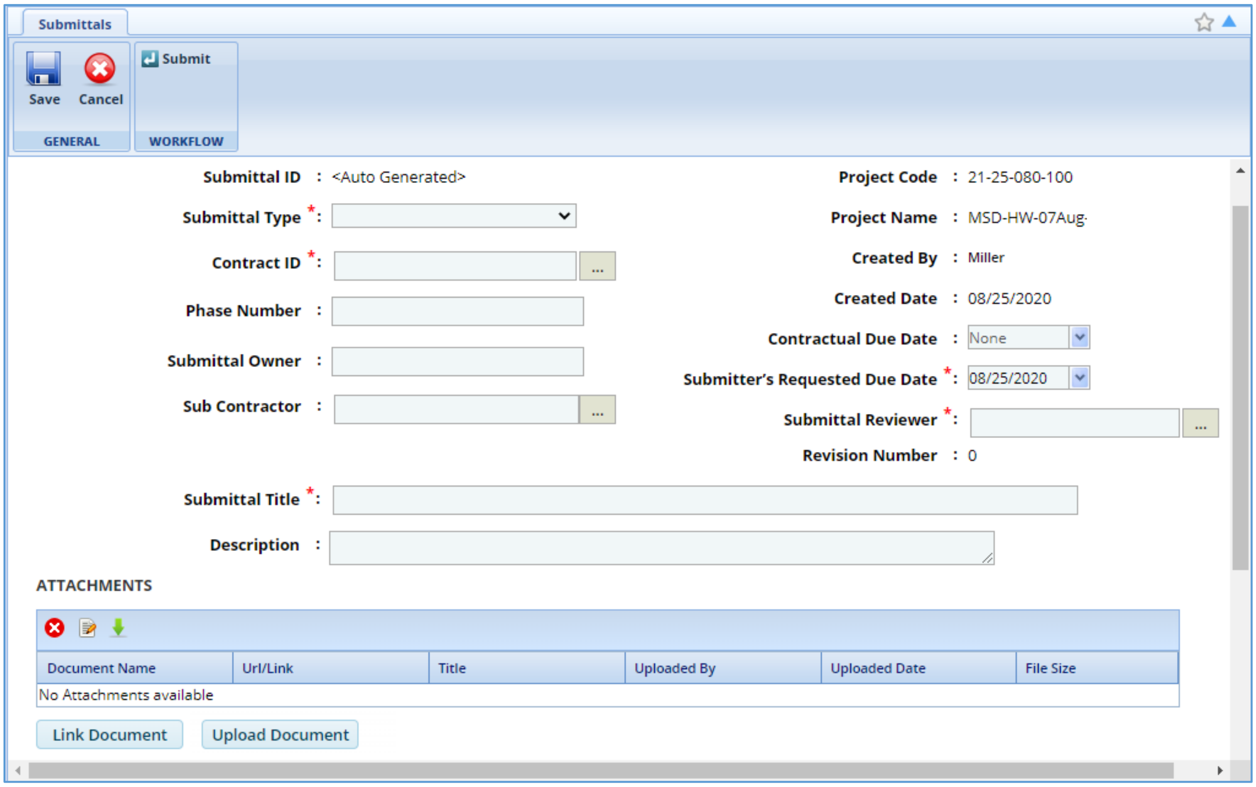
- Create a submittal
- Invite reviewers to review a submittal
- Review and Respond to a message
- Review and close a submittal
- Obtain business decisions from various stakeholders
- Create a revision of a submittal

5.1 Creating a Submittal

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. Click **Submittals**.
   The **Submittals** list page is displayed.

5. Click **New**.
   The **Submittals** page is displayed.



The following information is displayed:

Field Name	Description
Submittal ID	The automatically generated identification code for the submittal form.
Project Code	The identification code of the project for which the submittal form is being created.
Project Name	The name of the project for which the submittal form is being created.
Created By	The user name of the user creating the submittal form. That is, the name of the logged in user.
Created Date	The current date. That is, the date the submittal is being created.
Revision Number	For a submittal revision, the revision number of the submittal.

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

Field Name	Description
Submittal Type	Select the type of submittal. Available options are submittal types defined in the **Submittal Type** catalog of the library. The due date for the submittal is automatically displayed in the **Contractual Due Date** box based on the following: Contractual Due Date = Current Date + **Contractual Review Time** defined in the **Submittal Type** catalog of the library for the **Submittal Type** selected for the submittal.
If Other, specify	If the selected **Submittal Type** is **Other**, then enter the type of submittal.
Contract ID	To select the contract identification code of the contract for which the submittal form is being created, perform the following steps: 1. Click .... The **Contract ID** dialog box is displayed. Available options are contract identification codes selected in the **Project Phases** forms associated with the project. 2. Click the required identification code, and then click **Select**. The **Phase Number** and **Submittal Owner** of the selected contract identification code are displayed.
Submitter's Requested Due Date	Select the date by when the information for the submittal is expected by the Submitter.
Submittal Reviewer	To select the reviewer for the submittal form is being created, perform the following steps: 1. Click .... The **Select Submittal Reviewer** dialog box is displayed. Available options are user names of users invited to the project with the **Designer, Bridge Designer,** or **Geotech Engineer** role assigned to them. 2. Click the required reviewer, and then click **Select**.
Sub Contractor	To select the required sub-contractor, perform the following steps:

Field Name	Description
	1. Click ... . The **Select Sub Contractor** dialog box is displayed. Available options are contractors with the **Vendor Category** selected as **Construction Sub-Contractors** and marked as active in the **Vendors** catalog of the library. 2. Click the required contractor, and then click **Select**.
Submittal Title	Enter the title of the submittal.
Description	Enter a description of the submittal.

7. In the **ATTACHMENTS** section, attach or link submittal documents.
   For information on attachments, refer to Attachments.
8. To add references of records of forms in the project to the submittal form, in the **LINKED RECORDS** section, perform the following steps:
   a. Click **Add**.
      The **Select Items** dialog box is displayed.
   b. To select the required project form, in the **Source Form** box, click and select the required form.
      Alternatively, to select a contract form, perform the following steps:
      i. In the **Select Project / Contract** box, corresponding to the project name, click ✕ .
      ii. In the **Select Project / Contract** box, click and select the required contract.
          Alternatively, type the name of the contract, and then select the required contract.
          Available contracts are all the contracts the user is invited to in the project.
      iii. To select the required contract form, in the **Source Form** box, click and select the required form.
          Alternatively, type the name of the form, and then select the required form.
   c. Click **Search**.
      All the records of the selected form are displayed.
   d. Select the required records, and then click **Select**.
      The selected records are added to the **LINKED RECORDS** section.
      ***Note**: To view the details of a linked record, in the **Description** column, click the required record.*
9. To issue the submittal, in the **WORKFLOW** group, click **Submit**.
10. In the **Masterworks** dialog box, click **OK**.
    The **Submittals** list page is displayed.
    The workflow stage of the submittal is set to **Submitted**.

5.2 Inviting Reviewers to Review a Submittal

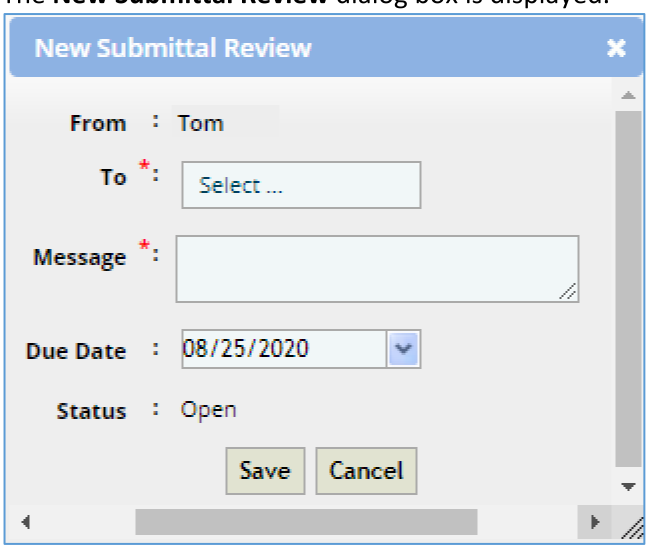
You can invite project users to review the submittal before the submittal is forwarded to appropriate stakeholders for approval.

Prerequisite

- The submittal is in the **Submitted** workflow stage.

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. Click **Submittals**.
   The **Submittals** list page is displayed.
5. Select the appropriate submittal that is in the **Submitted** workflow stage, and then click **Edit**.
   The **Submittals** page is displayed.
6. To invite project users to participate in discussions on the submittal, in the **SUBMITTAL REVIEW** section, perform the following steps:
   a. Expand the **SUBMITTAL REVIEW** section.
   b. Click **Invite**.
      The **New Submittal Review** dialog box is displayed.



   c. In the **To** box, click and select the users to address a message to.
      Alternatively, type the name of the user, and then select the required user name.
      Available user details are of users invited to the project.
   d. In the **Message** box, enter the details of the message to the addressees.
   e. From the **Due Date** calendar drop-down box, click and select the due date for the addressees to respond to the message.

f. Click **Save**.
A message row is created for every addressee.

g. To manage the added messages, perform any of the following steps in the **SUBMITTAL REVIEW** section:
- To edit a message, in the required row, in the **Message** column, click and enter the message details for the corresponding user.
- To edit the due date to receive a response, in the required row, click in the **Due Date** column, click , and then select the due date.
- To post the message to the corresponding user, in the last column corresponding to the user, click .
On saving the form, the submittal form with the message is available to the addressed users.

7. Click **Save**.

5.3 Responding to a Message

If a message is addressed to you, you can respond to the message, and thereby close the message.

Prerequisite

- The user is invited in the **SUBMITTAL REVIEW** section of the Submittals form.
- The **Status** column of the message displays **Open**.

Steps

1. In the module menu, click **Projects**.
The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. Click **Submittals**.
The **Submittals** list page is displayed.
5. Select the appropriate submittal that is in the **Submitted** workflow stage, and then click **Edit**.
The **Submittals** page is displayed.
6. To post a response to a message, in the **SUBMITTAL REVIEW** section perform the following steps:
   a. In the required message row, in the **Response** column, click and enter the response to the message.
   b. In the last column, click .
   The **Status** column of the message displays **Closed**, and the **Response Date** column of the message displays the date the message was responded to.
   Note: *You cannot revert the posted response after you have saved the record.*
7. Click **Save**.

5.4 Reviewing and Closing the Submittal

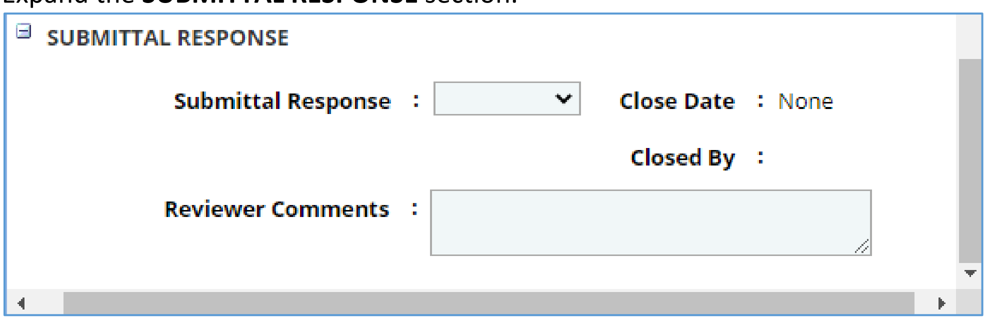
You can provide the final response for the reviewer's comments and close the submittal form.

Prerequisite

- The submittal is in the **Submitted** workflow stage.
- The user is selected in the **Submittal Reviewer** field of the submittal form.

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. Click **Submittals**.
   The **Submittals** list page is displayed.
5. Select the appropriate submittal that is in the **Submitted** workflow stage, and then click **Edit**.
   The **Submittals** page is displayed.
6. Expand the **SUBMITTAL RESPONSE** section.



The following information is displayed:

Field Name	Description
Close Date	On saving the record, the closed date of the submittal is automatically generated.
Closed By	On saving the record, the name of the logged in user is automatically generated.

7. From the **Submittal Response** drop-down list, select the appropriate response for the submittal.
   Available options are submittal responses defined in the **Submittal Response** catalog of the library.
   Note: *If the response selected in the* ***Submittal Response*** *drop-down list is* ***Revise and Resubmit****, when the submittal is transitioned from the* ***Submitted*** *workflow stage to the* ***Review Complete*** *workflow stage, a submittal revision is automatically created, and the current submittal is approved and closed.*
8. In the **Reviewer Comments** box, enter any comments for the submittal.
9. To close the submittal, in the **WORKFLOW** group, click **Review Complete**.

10. In the **Masterworks** dialog box, click **OK**.
    The **Submittals** list page is displayed.
    The workflow stage of the submittal is set to **Closed**.
    If the response selected in the **Submittal Response** drop-down list is **Revise and Resubmit**, when the submittal is transitioned from the **Submitted** workflow stage to the **Review Complete** workflow stage, a submittal revision record is automatically created in **Draft** workflow status, and the current submittal is set to **Closed**.
    ***Note**: You can also manually create a revision to a submittal that is in the **Closed** workflow stage.*

5.5 Submittal Workflow Stages

Phase	Current Workflow Status	Stakeholders	Action	Subsequent Workflow Status	Comments
1	Draft	• Contractor User	Submit	Submitted	At the **Submitted** stage, you can invite project users to collaborate and discuss on the submittal. At the **Submitted** stage, you can provide a response on the submittal and then approve the submittal.
2	Submitted	• Designer • Bridge Designer • Geotech Engineer	Review Complete	Closed	Only the user selected in the **Submittal Reviewer** field can perform this workflow action. When **Revise and Resubmit** is selected in the **Submittal Response** drop-down list, a revised submittal form is automatically created in **Draft** workflow status, and the workflow status of the current submittal is set to **Closed**. ***Note**: You can also manually create a revision to a submittal that is in the **Closed** workflow stage.*

Phase	Current Workflow Status	Stakeholders	Action	Subsequent Workflow Status	Comments
					The submittal revision record contains the following information: • The same **Submittal ID** as the original submittal. • The **Revision Number** is incremented by 1 from the **Revision Number** of the original submittal. • The same information as the original submittal with the link to the original submittal displayed in the **LINKED RECORDS** section. Also, the original submittal contains the link to the newly created submittal revisions in the **LINKED RECORDS** section.

5.6 Creating a Submittal Revision

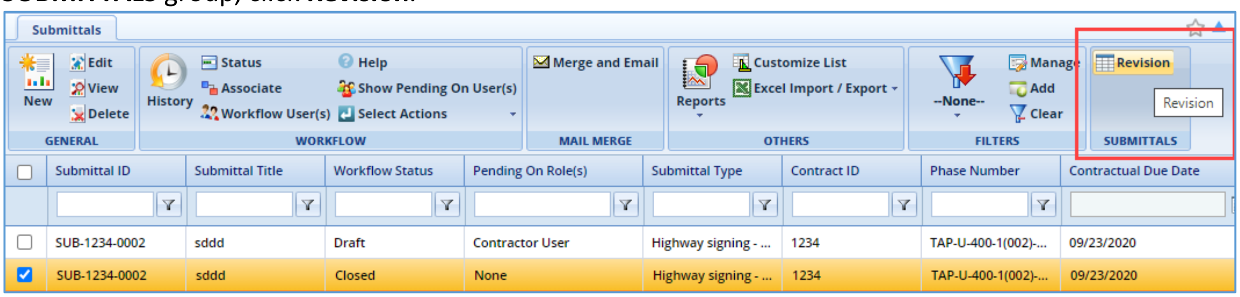
You can create a revision of a submittal.

Prerequisite

- The submittal is in the **Closed** workflow stage.

Steps

1. In the module menu, click **Projects**.
   The **Project List** page is displayed.
2. In the **Project List** page, click the required project, and then click **View**.
3. In the navigation pane, expand the project folder, and then expand the **Collaboration** folder.
4. Click **Submittals**.
   The **Submittals** list page is displayed.
5. Select the appropriate submittal that is in the **Closed** workflow stage, and then in the **SUBMITTALS** group, click **Revision**.



   A new submittal with the same **Submittal ID** as the original submittal is created.
   The newly created submittal contains the following information:

   - The same **Submittal ID** as the original submittal.
   - The **Revision Number** is incremented by 1 from the **Revision Number** of the original submittal.
   - The same information as the original submittal with the link to the original submittal displayed in the **LINKED RECORDS** section. Also, the original submittal contains the link to the newly created submittal revisions in the **LINKED RECORDS** section.

6 Appendix

6.1 Attachments

You can upload attachments, or link files in the Documents folders to every form and workflow transition. There is no limitation on the number of attachments or the size of attachments that you can upload in a form or during workflow transition.

Refer to the following topics to upload or link, and access attachments:

- Attaching Files to a Form
- Accessing Attachments

You can download, annotate, and update attachments.

6.1.1 Attaching a File to a Form

You can upload files to a form or during a workflow transition. You can also link a file in the Documents folders to a form or during a workflow transition.

Steps

- To upload files, 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 key, and then click the required files.
  c. Click **Open**.
  The files are uploaded to the form and are displayed in the **ATTACHMENTS** section.
  d. In the **Title** column, enter the titles for the files attached.
- To link to files in the **Documents** folders, perform the following steps:
  a. In the **ATTACHMENTS** section, click **Link Document**.
  b. Click Masterworks Document.
  c. From the **Folder** drop-down list, select the required folder where the files exist.
  The list of files in that folder are displayed.
  d. From the list of files, select the required files.
  e. Click **OK**.
  The files are linked to the form and are displayed in the attachment grid.
  f. In the **Title** column, enter the titles for the linked files.
- To link a file in an external storage system, perform the following steps:
  a. In the **ATTACHMENTS** section, click **Link Document**.

b. Click External Document.

c. In the **URL/Link** box, enter the URL to the file in external storage system.

d. In the **Title** box, enter the title for the linked file.

e. Click **OK**.
The file is linked to the form and is displayed in the attachment grid.

6.1.2 Accessing Attached Files

You can access files that are attached to forms and workflows.

Steps

- To access files attached to a form:

1. In the navigation pane, click the required form.
   The form list page is displayed.
2. In the tool bar, in the **OTHERS** group, click **Attachments**.
   The attachments of all the forms are listed.

- To access files attached to a workflow:
  - You can access files attached to a workflow from the Workflow History dialog box.
- To download an attachment, click the required document, and then click .

6.1.3 Deleting Attached Files

You can delete files that are attached to forms and workflows.

Steps

1. To access the required file, perform either of the following steps:
   - Files attached to a form:
     a. In the navigation pane, click the required form. The form list page is displayed.
     b. In the tool bar, in the **OTHERS** group, click **Attachments**.
        The attachments of all the forms are listed.
   - Files attached to a workflow:
     - You can access files attached to a workflow from the Workflow History dialog box.
2. To delete an attachment, click the required document, and then click .