About this Document
This section describes the purpose of this document and the intended audience.

Disclaimer
This section contains the disclaimer information.

Trademark Notices
This section contains the trademark and copyright information.

Record Tracking and Revision History

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<th>Date</th>
<th>Section(s)</th>
<th>Description of Change(s)</th>
<th>Author(s)</th>
<th>Page #</th>
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<td></td>
<td>MTO Comments</td>
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<td>MTO Comments</td>
<td>MTO</td>
<td></td>
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Introduction to WBCMS-MTO

WBCMS-MTO is a Web-based Contract Management Services software solution for owners, stakeholders, general contractors, and external service providers (ESPs) of the Ministry of Transportation, Ontario (MTO). External service providers include contract administrators, inspectors, material testers, material suppliers, engineering designers, and others.

Features

Contract Management

The Contract Management module provides access to contract information at any time and from any place, enabling better collaboration between teams and providing a clear contract 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 contract 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 contracts.

Benefits of WBCMS-MTO

This versatile application enables you to efficiently carry out complex functions to manage a contract throughout its lifecycle by:

- Flexible and Easy Deployment
- Instant Access to Information
- Complete Contract Management
- Intelligent Contract Management
- Document Management
- Easy Administration

Modules

WBCMS-MTO consists of modules that are independent of each other. Each module seamlessly integrates with the other module to allow the users to manage a contract throughout its lifecycle. WBCMS-MTO has two core modules. They are:

- Home
- Contracts

Home

The Home page is the landing page of the WBCMS-MTO. The Home page displays information of all contracts across the applications, which are available on the left pane, and links to user-configurable dashboards, which are available on the right pane. You can also configure the display layout and add widgets of your choice to the dashboards. Information is presented in the form of graphs/charts that
enable a user to get first-hand information of the status and progress of various contracts, resources, and workflows.

**Recent Contracts** displays links to five contracts recently opened by the logged in user.

---

<table>
<thead>
<tr>
<th>Record Name</th>
<th>Contract Number</th>
<th>Security Tag &amp; Record ID</th>
<th>Status</th>
<th>Last UpdatedOn</th>
</tr>
</thead>
<tbody>
<tr>
<td>CC27022015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auroso Santry_CC_Central</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auroso Santry_CC_Central</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auroso Santry_CA_Central</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auroso Santry_Lab_Central</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

The Home also provides quick links to Recently Viewed contracts, the Enterprise Search feature to search for specific contracts and contract details across the entire system.

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

**Note:** Availability of information on this page is based on the user role.

- **Enterprise Search** engine helps user to search for all the records accessible to the user logged in within the contracts the user has been invited to.
- **Tasks** are used to view the pending tasks in all the contracts the user has been invited to.
- **Favorites** tab is used to manage favorites. It displays all the modules marked as ‘Favorites’ for the logged in user. Icon present on the extreme right corner of the UI provides an option to add a selected module/contract/record feature to the ‘Favorites’ group.
- **Recent contracts** displays links to five contracts recently opened by the logged in user.
The Contracts module provides utilities to create and manage multiple contracts within WBCMS-MTO. This module automates the entire process of managing contracts through the contract lifecycle.
Common features of WBCMS-MTO

This chapter helps you understand the interface, common screen icons, using page navigation controls, and the Enterprise Search utility. The following are the chapter sections:

- Understanding the User Interface
- Common Screen Icons and Controls
- Record Standard Column Headings
- Page Navigation Controls

Understanding the User Interface

The user interface of WBCMS-MTO contains various elements that have been described below:

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Logo Area</td>
<td>The logo area displays the WBCMS-MTO™ logo. The user name and user role of the user is displayed. The user can change their password and log out.</td>
</tr>
<tr>
<td>2. Page navigation links</td>
<td>The trail of page navigation links is displayed (i.e. ‘Home’) to track your location within the application.</td>
</tr>
<tr>
<td>3. Favorites</td>
<td>User can bookmark commonly used pages in the application for easy and quick access.</td>
</tr>
<tr>
<td>4. Role</td>
<td>Displays your current user role.</td>
</tr>
<tr>
<td>5. Menu</td>
<td>Displays the main menu for WBCMS-MTO. Menu tab is located in the left pane.</td>
</tr>
<tr>
<td>6. Favorites</td>
<td>It is used to manage favorites. Favorites tab is located in the left pane.</td>
</tr>
<tr>
<td>7. Toggle button</td>
<td>To show or hide and re-size the panes. Docking the left pane provides more space to view information on the right pane.</td>
</tr>
<tr>
<td>8. Left Pane</td>
<td>Links to pages available in the module.</td>
</tr>
<tr>
<td>9. Right Pane</td>
<td>Displays the work area for records and modules.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td><strong>10. Module Menu</strong></td>
<td>Buttons to access the various modules of WBCMS-MTO.</td>
</tr>
<tr>
<td><strong>11. Status bar</strong></td>
<td>Displays the copyright and version number of the application.</td>
</tr>
</tbody>
</table>
## Screen Icons and Controls

The table below provides a quick reference of tasks that can be performed using common screen options and controls.

<table>
<thead>
<tr>
<th>Term</th>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td><img src="#" alt="New Icon" /></td>
<td>Creates a new record.</td>
</tr>
<tr>
<td>Edit</td>
<td><img src="#" alt="Edit Icon" /></td>
<td>Edits a record.</td>
</tr>
<tr>
<td>View</td>
<td><img src="#" alt="View Icon" /></td>
<td>Views an existing record.</td>
</tr>
<tr>
<td>Delete</td>
<td><img src="#" alt="Delete Icon" /></td>
<td>Deletes a record.</td>
</tr>
<tr>
<td>Reports</td>
<td><img src="#" alt="Reports Icon" /></td>
<td>Reports feature is applicable to a set of selected modules/records. Displays reports related to the particular module in which it is being viewed.</td>
</tr>
<tr>
<td>History</td>
<td><img src="#" alt="History Icon" /></td>
<td>View the workflow history of the selected record.</td>
</tr>
<tr>
<td>Status</td>
<td><img src="#" alt="Status Icon" /></td>
<td>View the current workflow stage of the record. The current status of the record is highlighted in the workflow diagram.</td>
</tr>
<tr>
<td>Attachment</td>
<td><img src="#" alt="Attachment Icon" /></td>
<td>Indicates the record in the list contains an attachment.</td>
</tr>
</tbody>
</table>
### Standard Column Headings

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created Date</td>
<td>The creation date of the record</td>
</tr>
<tr>
<td>Created by</td>
<td>The username of the user who created the record.</td>
</tr>
<tr>
<td>Record ID</td>
<td>The unique identifier of the record.</td>
</tr>
<tr>
<td>Workflow Status</td>
<td>The current status of the record.</td>
</tr>
<tr>
<td>Last Updated On</td>
<td>The date on which the record was last updated.</td>
</tr>
<tr>
<td>Last Updated By</td>
<td>The username of the user who last updated the record.</td>
</tr>
</tbody>
</table>

### Page Navigation Controls

The controls are described in the table below:

<table>
<thead>
<tr>
<th>Control</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![previous page]</td>
<td>Go to first page</td>
</tr>
<tr>
<td>![previous page]</td>
<td>Go to previous page</td>
</tr>
<tr>
<td>![current page]</td>
<td>Current Page</td>
</tr>
<tr>
<td>![pages]</td>
<td>Pages</td>
</tr>
<tr>
<td>![next page]</td>
<td>Go to next page</td>
</tr>
<tr>
<td>![last page]</td>
<td>Go to last page</td>
</tr>
</tbody>
</table>
Using Filters

You can search for specific records that match criteria you provide. Records that match the criteria you provide are displayed in the list page.

Steps

1. Click **Contracts** in the module menu. The list of contracts in the enterprise are displayed.
2. From the contract navigation pane click any link to open the list page of the records.
3. Enter the filter criteria in the filter text box in the required column.
4. Click **Filter**. The following image displays the filter options that can be selected.

   ![Filter Options](image)

5. Click the filter option for the specified filter criteria.
The following table describes the available filter options:

<table>
<thead>
<tr>
<th>Filter Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Filter</td>
<td>Removes the filter criteria in that column.</td>
</tr>
<tr>
<td>Contains</td>
<td>Displays records that contain the characters as specified in the criteria.</td>
</tr>
<tr>
<td>DoesNotContain</td>
<td>Displays records that do not contain the characters as specified in the criteria.</td>
</tr>
<tr>
<td>StartsWith</td>
<td>Displays records that contain the characters as specified in the criteria at the beginning of the column value.</td>
</tr>
<tr>
<td>_endsWith</td>
<td>Displays records that contain the characters as specified in the criteria at the end of the column value.</td>
</tr>
<tr>
<td>EqualTo</td>
<td>Displays records that match the characters as specified in the criteria.</td>
</tr>
<tr>
<td>NotequalTo</td>
<td>Displays records that do not match the characters as specified in the criteria.</td>
</tr>
<tr>
<td>IsEmpty</td>
<td>Displays records that do not have data in the column being filtered.</td>
</tr>
<tr>
<td>IsNotempty</td>
<td>Displays records that have data in the column being filtered.</td>
</tr>
<tr>
<td>Clear All Filter</td>
<td>Deletes filter criteria in all the columns and displays all records.</td>
</tr>
</tbody>
</table>

All records matching the criteria and the filter options selected for each of the columns are displayed.
Date and Time Format / Time Zone / Unique Record ID

The date format is **dd-MMM-yy**. (Example: 03-JUN-15)

**Time Format**

The time format is a 24 hour clock (**hh:mm:tt**). (Example: 13:30:45)

**Time Zone**

The time zone is Eastern Standard Time (US and Canada) (UTC-05:00).

**Unique Record ID**

The Unique Record ID format is **Contract Number + Record Name (abbreviation) + Record Number**

An example with the Bridge Deck Covermeter record: **2015-2001-BDCS-0013**
Global Functions of WBCMS-MTO

Enterprise Search Utility

Enterprise Search is a search engine application link that appears in the left pane in the Home page of WBCMS-MTO. You can use this feature 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 contracts the user has been invited to.

Steps

1. When logged into the WBCMS-MTO, from the Home page, click the Enterprise Search link.

2. From the Search within list, select a record within which you want to search for data or records. The criteria fields relevant to the module appear.

3. Enter the required criteria to search.

4. Click Search.

Note: The information that meets the criteria appears in the Search Results pane. Search results contain information of only those contracts the user has been invited to.

5. Optionally, click Export to save the search results to an Excel workbook.
Tasks

Tasks are implemented at the Home and Contract level. Tasks pending from the user are listed in a page similar to a To-Do List. To perform any task, the user role must be assigned the permissions to perform the task, and the user must be invited to the contract.

Following are the locations where Tasks is listed.

The WBCMS-MTO Home page:

![Tasks - Home](image1)

The Contracts page:

![Tasks - Contracts](image2)
Using the Favorites Utility

The Favorites Utility is used to access different links and documents in a single click similar to the Favorites option in a browser. To add to the Favorites utility, you need to click the ★ button at the right hand corner of the active window.

Steps

1. From the Home page, navigate to the page or the link that you wish to add.

2. Click Add to favorites ★. The pop-up window appears with the Title and the Folder that you want to save it in.

3. In the Title box is enter the name of the favorite link as must be displayed in the Favorites tab.

4. Optionally, type the name of the new folder after selecting the New Folder check box.

5. Click Add to add the page to Favorites. The newly added favorite link appears under the Favorites tab on the left pane of the WBCMS-MTO.
User Management

This section describes the User Management feature and the procedures to manage user accounts.

The WBCMS-MTO User Management feature enables you to create and manage user accounts for the WBCMS-MTO application.

WBCMS-MTO allows you to perform the following tasks:

- Create Internal User Accounts
- Assign Users to Roles
- Invite Internal User to Contracts
- Enrol a Service Provider
- Purchase External User Subscriptions
- Assigning and Approving the External User Subscriptions
- Releasing the External User Subscriptions
- Configure password settings.
Manage Internal User Profiles

This section describes the various activities performed pertaining to the User Accounts record. We are using the User Accounts record to demonstrate the activities involved with inviting Internal Users to the application, Unlocking an Internal User account, Changing the status of an Internal User account, Resetting passwords for an Internal User account, and Inviting an Internal User to a contract.

User Accounts

Roles Involved

User roles are stakeholders who have the privileges to Creates Internal Users in the application. The table below lists the user roles involved in the User Accounts record.

<table>
<thead>
<tr>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTO User Administrator</td>
</tr>
<tr>
<td>MTO Region User Administrator</td>
</tr>
</tbody>
</table>

Getting Started with User Accounts Record

To navigate to the User Accounts record:

1. In the module menu, click **Administration**. The **Administration** dashboard is displayed.

2. Click **User Accounts**. The **Internal Users** list page is displayed.

![List of Internal User Records](image)
Creating an Internal User Account

1. In the Internal Users list page, click New in the General group. The Add User page is displayed.

   Field Details - Add User Page Details

2. In the Add User page, fill in the following information in the fields listed below:
   a. Region - Select the region for the user. The user can be added to either the Head or any Regional Office.

      Note: The Region field is non-editable once a user’s details are saved. If a user is added to more than one region, the user will have a different ID for each region.

      Note: The Region field is non-editable for the user role MTO Region User Administrator.

   b. First Name, Middle Name, Last Name - Enter the first name, middle name, and last name of the user in the respective fields.

      Note: On saving the user’s details, a user ID is generated with a maximum of first five characters from the last name and the first two characters from the first name of the user. For example, the user ID generated for the username “John Lee” would be LeeJo. Once the user information is saved, a user’s first and last names cannot be changed.

   c. Postal Code - Enter the postal code of the user’s region.
   d. Email - Enter the user’s email address.
   e. Title/Position - Enter the user’s title or position within the organization.
   f. Address Line 1, 2 and 3 - Enter the user’s business address.
   g. City - Enter the name of the city of the user’s region.
   h. Province - Enter the province of the user’s region.
   i. Telephone - Enter the contact business telephone number of the user.
   j. Fax - Enter the FAX number
   k. Mobile No - Enter the mobile number of the user.

3. In the Assign Roles list, select the appropriate role for the user and click Add to associate the selected role to the user.
**Note:** A user having a Head Office role can operate in the activities defined for the role across the province, whereas a user having a Regional Officer role can operate only in the activities defined for the role in the associated region.

**Assign Roles Section**

4. Click **Save**. A system-generated email is sent to the user with the user ID and password.

**Note:** When a new user logs into the application, the user is auto-directed to the Reset Password page where it is mandatory to change the password to continue using the application.

**Note:** User IDs are unique across the application for both Internal and External Users.

**Note:** When a new user account is created for a region, the user will be associated to the corresponding Role Group and all associated contracts for that region.
Unlocking a User Account

WBCMS-MTO automatically locks a user account when a user fails to enter the correct login details within the specified number of failed attempts that are allowed in the system. The user will not be able to log in until the account is reset and hence, must make a request to the MTO User Administrator or the MTO Region User Administrator to reset the account.

1. In the Internal Users list page, select a locked user account. The Is Locked checkbox will be selected for a user with a locked user account.

2. In the Details group, click Unlock. The user account becomes unlocked.
Changing the Status of a User Account

Deactivating a user account, or activating a deactivated account for administrative or other valid reasons is termed as changing the status of a user account.

1. In the Internal Users list page, select a user account.
2. Click Change Status.

The current status of the user account is switched.
Resetting Password for an Internal User Account

1. In the **Internal Users** list page, select a user account.

2. In the **Details** group, click **Reset Password**. The message **Password is reset successfully** appears. The user receives a mail notifying the password change along with the changed password.
Inviting Internal Users to a Contract

**Note:** Inviting Internal Users to a contract is not an activity directly related to the User Accounts record. However, this activity has been added in this document to comprehensively include all activities related to managing Internal Users.

- The roles involved in this activity are:
  - Contract Creator - HO
  - Contract Reviewer - HO
  - Contract Creator - RO
  - Contract Reviewer – RO
  - CSA
  - Head of Contract Services.

1. To invite Internal Users to a contract, click **Contracts** in the Homepage. The **Contract List** page is displayed.

2. Double-click the contract record to which you want to invite Internal Users. The Contract Dashboard tab is displayed.

3. Click and navigate to the **Contract Details** tab.

4. Click **Manage Internal Users** in the **Others** group. The **Manage Internal Users** page is displayed.

5. In the **General** group, click **Add User**. A list of all the Internal Users based on the region of the contract is displayed.
Note: Every contract has user roles that are mandatory and are required to be invited to the contract in order to proceed to subsequent stages of its workflow. These user roles are listed in the Manage Internal Users page.

6. From the All Users list, select the Internal Users to be invited to the contract.

7. Click Add Users. The message “The selected User(s) have been added successfully to the Contract” appears. The newly invited Internal User’s record details is displayed in the Manage Internal Users page.
**Note:** Internal Users can also be auto-invited to a contract. If an Internal User is auto-invited to a contract, the Is Auto-Invited checkbox will be selected for the user. Auto-invited users cannot be removed from a contract.
Manage External User Profiles

This section describes the various activities performed pertaining to External User enrollment. We use different records to demonstrate the activities involved with Inviting External User Administrators to the application, Managing subscriptions, and Inviting External Users to the application.

**Service Provider (Awardee)**

**Roles Involved**
User roles are stakeholders who have the privileges to either Invite External User Administrators to the application or Approve External Users added to the application by External User Administrators. The table below lists the user roles that have access to the Service Provider (Awardee) record.

<table>
<thead>
<tr>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Creator - HO</td>
</tr>
<tr>
<td>Contract Reviewer - HO</td>
</tr>
<tr>
<td>Contract Creator - RO</td>
</tr>
<tr>
<td>Contract Reviewer - RO</td>
</tr>
<tr>
<td>Contract Services Administrator (CSA)</td>
</tr>
<tr>
<td>Internal QA Supervisor</td>
</tr>
</tbody>
</table>
Getting Started with Service Provider (Awardee) Record

To navigate to the Service Provider (Awardee) record:

1. In the module menu, click Contracts. The Contract List page is displayed.

2. Double-click the required contract. The Contract Dashboard tab is displayed.

3. From the left contract tree, expand Contract Setup.

4. Click Service Provider (Awardee). The Service Provider (Awardee) page is displayed.
Enrolling an External User Administrator to the Application

Prerequisites
To enrol an External User Administrator to the application:

- The contract must be in the Awarded stage of the Contract Details Workflow. For a contract to be in the Awarded stage, relevant details must be entered in the following records:
  - Budget
  - Engineering Items (Tender Items for construction contracts)
  - Service Provider (Awardee)
  - Material Testing Schedule Fee (for construction contracts and lab contracts)

- The roles involved in this activity are:
  - Contract Creator - HO
  - Contract Reviewer - HO
  - Contract Creator - RO
  - Contract Reviewer – RO

*Note*: Only a Contract Reviewer can move a contract from the Submitted stage to the Awarded stage.

1. In the Service Provider (Awardee) page, click in the Service Provider Details section. The list of service providers is listed.

2. Select the Service Provider and click Select. The Service Provider's RAQS ID and company name are populated in the respective fields in the Service Provider Details section.

3. In the Site Address section, enter the site address by entering the street address, city, province and postal code in the respective fields.

![Service Provider Details](image)

4. In the Company Administrator Name section, enter the External User Administrator details such as first name, last name, primary contact email, and telephone number in the respective fields.

5. Expand Company Roles. A list of all External User roles to which the External User Administrator can invite users is displayed. You can remove or add roles to this list.
6. Enter the **HST Number** in the **Post Subscription** section.

7. Click **Save**.

Once a contract moves to the Awarded stage, a system-generated email is sent to the primary contact email address of the External User Administrator notifying them of the invitation to the contract within WBCMS-MTO.

The email includes the contract number and a hyperlink to the subscription purchase form that must be completed by the External User Administrator to access the External Users form.

```
Dear Moron Mathews,

You have been awarded contract number: 2486714. Please click on the below link to complete the subscription process.

[Click Here to subscribe]

Regards,

MTO
```

**External User Administration Invitation Mail**

*For more details on managing subscriptions, refer to the [Managing Subscriptions](#) section.*
External Users

Roles Involved

A User Role is a stakeholder who has the privileges to invite External Users to the contracts.

<table>
<thead>
<tr>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>External User Administrator</td>
</tr>
</tbody>
</table>
Purchasing External User Subscriptions for a Contract

Prerequisites
To purchase External User subscriptions for a contract:

- The External User Administrator must be invited to the contract by the Contract Creator or Contract Reviewer of that contract.
- The External User Administrator must receive the system-generated email containing the contract number and the hyperlink to the subscription purchase form.

1. In the invitation email to the contract, click the Click Here hyperlink to the subscription purchase form. The User Registration page is displayed. This page contains all details entered for the External User Administrator in the Service Provider (Awardee) page.

2. In the User Registration page:
   a. Select the I agree to Terms & Conditions checkbox.
   b. Enter the verification code as displayed in the Captcha. Please Note that the Captcha is case sensitive.
   c. Click Save. The Add Subscriptions page is displayed.

3. In the Add Subscriptions page:
   a. Add the number of subscriptions to be purchased in the respective field.
   b. Select the I order according to the End User License Agreement checkbox.
   c. Click Pay. The Online Payment System page is displayed.
In the Online Payment System page, observe the Contact Information section in the Customer Information tab is auto-populated from the information in the Service Provider (Awardee) page of the contract.
4. In the **Online Payment System** page,
   a. In the **Customer Information** tab, verify the data auto-populated from the **Service Provider (Awardee)** page and click **Continue**. The **Account & Payment Information** tab is displayed.

In the Account & Payment Information tab, RAQ ID is auto-populated in the Account number field of the Account Information section.
b. In the **Payment Information** section of the **Account & Payment Information** tab:

   i. In the **Payment method** drop-down, select **Credit Card**.
   
   ii. From the **Card type** drop-down, select the card type.
   
   iii. In the **Card number** field, enter your credit card number.
   
   iv. In the **Card security number** field, enter your card security number.
   
   v. In the **Expiration date** drop-downs, select the day, month, and year of your card’s expiration date.
   
   vi. In the **Card holder name** field, enter your name as on the credit card.
   
   vii. Click **Continue**. The **Confirm Payment** tab is displayed.

Confirm the summary of information before making the payment.
Online Payment System

Customer Information
Account Information
Payment Information

Please confirm all of the information below and click Make Payment.

Contact Information
Change
First name: Meren
Last name: Mathews
Daytime phone number: (121) 121-1212 x12121
Email address: merenmathews.m@originlearning.com

Account Information
Change
Payment type: License
Account number: RAQ-008
Payment method: Credit Card
Payment amount: $15,255.00

Payment Information
Change
Card type: MasterCard
Card number: **********5454
Expiration date: 11/25
Card holder name: Meren Mathews

Click to read the Terms and Conditions
I agree to the Terms and Conditions.

Make Payment  Cancel

Online Payment Confirmation
c. In the **Confirm Payment** tab,
   i. Select the **I agree to the Terms and Conditions** checkbox.
   ii. Click **Make Payment**. Once the payment is completed, the payment receipt page is displayed.

### Online Payment Receipt

Once payment is complete, you will receive a payment confirmation mail from the payment service providers and a mail from **WBCMS-MTO** confirming your payment along with your login credentials to the application.
Navigating to External Users Record

To navigate to the External Users record:

1. Login to your email account with the Email ID used in the Subscription Purchase Form.

2. From your Inbox, open the email from Aurigo that contains:
   - Your subscription payment transaction details
   - A hyperlink to the WBCMS-MTO Login Page
   - Your login credentials.

   Mail Confirmation

   Dear [Name],

   We are pleased to confirm your payment for Contract Number: 2486714. Below is the summary of your payment transaction:

   Invoice No.: 2486714-RAQ-008-2016-305  
   Date: 2016-09-28  
   Subscription Period: 2016-09-28 to 2017-09-28  
   No. of Subscription Purchased: 15  
   Total Amount: CAD 22882.50  
   Payment Method: MC  
   Payment Status: ACCEPTED  
   Confirmation Number: 27038560

   Click Here to login to the application.

   User Name: MatheMe1
   Password: Qc9y4XLa

   The subscription invoice is attached herewith.

   Regards,

   Aurigo

3. Click the hyperlink to login to the WBCMS-MTO application using your login credentials. The Reset Password page is displayed.

4. In the Reset Password page:
   a. Enter your old password, new password, confirm new password, and the verification code in the respective fields.
   b. Click Reset Password. The message “Password is updated. Please login with the new password” appears.
   c. Click OK. The WBCMS-MTO login page appears again.
5. Login to the application with your new password. The **WBCMS-MTO Home** page is displayed.

6. In the module menu, click **Administration**. The **Administration** page is displayed.

7. In the left navigation pane, expand **User Management**. The **External Users** record is displayed.

8. Click the **External Users** record. The **External Users** list page is displayed. This page includes all External Users records that have been invited to contracts with the same RAQs ID.
Creating External User Accounts for a Contract

Prerequisites

To create External User accounts for a contract:

- The External User Administrator must purchase External User subscriptions for that contract.
- The External User must have access to the External Users record for the contract.

1. In the External Users list page, click New.

2. In the External Users page:
   a. Click in the Contract Number field. A list of awarded contract numbers to which you are invited is displayed.
   b. Select the required contract number and click Select. The selected contract number is displayed in the Contract Number field.
   c. Enter the user’s first and last names in the First Name and Last Name fields, respectively.
   d. Enter the user’s contact address in the Address, City, and Postal Code fields.
   e. Enter the user’s contact email address in the Email field.
   f. Enter the user’s contact number in the Telephone field.
   g. Click in the Role field. A list of roles that can be assigned to External Users for the respective contract is displayed.
   h. Select the required role and click Select. The selected role is displayed in the Role field.

Note: The Roles List will appear only if the contract number is selected in the Contract Number field.
Field Details - Record Details

Note: For user roles other than the External User Administrator, the system will auto-generate user IDs prefixed with the respective contract numbers.
Subscription Management

Roles Involved

User role is a stakeholder who has the privileges to assign subscriptions to External Users to the contracts to which they are invited to.

<table>
<thead>
<tr>
<th>User Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>External User Administrator</td>
</tr>
</tbody>
</table>
Getting Started with Subscription Management Record

To navigate to the Subscription Management record:

1. Log in as the External User Administrator. Your home page is displayed.

2. In the module menu, click **Contracts**. The **Contract List** page is displayed.

3. Double click the required contract. The **Contract Dashboard** tab is displayed.

4. In the left navigation pane, expand **Manage External Users**. The **Subscription Management** is displayed.

5. Click on **Subscription Management**. The Subscription Management page is displayed.
Observe that you can manage subscriptions and view purchase history in the Subscription Management page.
Purchasing External User Subscriptions

If you do not have sufficient subscriptions to add External Users to the contact, you can purchase subscriptions. The Purchase History tab in the Subscription Management page displays your subscription purchase history.

To purchase External User subscriptions:

1. In the Subscription Management page, click Purchase Subscription in the Other group. The subscription purchase form is displayed.

2. Complete the subscription purchase form as per the steps listed in the Purchasing External User Subscriptions for a Contract section. On payment, a payment confirmation email containing the payment transaction details and a hyperlink to the WBCMS-MTO login page is sent to your email address contained in the form.

Observe the subscription purchase details are updated in the Purchase History tab of the Subscription Management page.
Assigning a Subscription to an External User

Prerequisites
To assign a subscription to an External User:

- A user ID must be generated for the External User by the External User Administrator in the External Users list page.
- There must be sufficient subscriptions available for assigning.

1. In the Subscription Management page, expand Manage Subscriptions. The list of subscriptions is displayed.

2. Click Add. The list of unsubscribed External Users is displayed.

3. Select the External User to whom the subscription is to be assigned.

4. Click Select. The selected External User record is displayed in the Manage Subscriptions table.

5. Select the added External User account and click Edit. The Edit Manage Subscriptions dialog box is displayed.

6. Click the Subscription ID drop-down and select the system-generated subscription for which the remaining balance is not zero in “Purchase History”.

7. Click Save. The Subscription ID row for the External User in the Manage Subscriptions table becomes populated with the selected subscription ID.
8. Click Save in the **General** group. On saving, the **Is Expired**, **Expiry Date**, and **Added On** fields in the **Manage Subscriptions** table for the External User becomes auto-populated based on application configurations for External User subscriptions.

Observe on assigning a subscription for an External User for a construction contract, the External User subscription gets auto-approved and an email is sent to the External User with their login credentials. However, when inviting an External User to a CA contract or an Inspection contract, the External User subscription must be approved by the CSA from the Service Provider (Awardee) page. External User subscriptions to Lab contracts must be approved by the Internal QA Supervisor.

*For more details on approving External User subscriptions, refer to the Approving an External User Subscription section.*
Approving an External User Subscription

Although External User subscriptions for a contract are approved in the Service Provider (Awardee) record of the contract, the following steps must be completed by an External User Administrator in respective records before a CSA or an Internal QA Supervisor can approve an External User subscription:

- Purchase External User subscriptions for a contract.
- Assign a subscription to an External User and create an External User.

For more details on purchasing External User subscriptions and assigning a subscription to an External User, refer to the Purchasing External User Subscriptions for a Contract and the Assigning a Subscription to an External User sections.

To approve an External User subscription:

1. Login to the application as the CSA to approve External User subscriptions for CA and Inspection contracts or as the Internal QA Supervisor for Lab contracts.

2. In the module menu, click Contracts. The Contract List page is displayed.

3. Double-click the required contract record. The Contract Dashboard tab is displayed.

4. In the left navigation pane, expand Contract Setup.

5. In the left navigation pane, click the Service Provider (Awardee). The Service Provider (Awardee) page is displayed. This page includes the contract details, the External User Administrator details, and External Users associated to the contract.

6. Scroll down to the Subscription Information section and expand Subscription Information. The Subscription Information table showing all subscriptions is displayed.
7. Click **Approve** in the **Other** group. The message “Selected User(s) approved” appears.

![Image of subscription approval process]

**Approving External User Subscription**

Observe that once **Approve** is clicked, the **Is Approved** checkbox becomes selected and the date of approval is auto-populated in the **Approved On** field.

![Image of subscription information]

**Approved External User Subscription Information**

A system-generated email is sent to the External User with the hyperlink to the WBCMS-MTO application and their login credentials.

**Note:** Whenever a new user logs into the application, the user is auto-directed to the Reset Password page where it is mandatory to change their password to continue using the application.

**Note:** If the subscription reaches the expiration date, the user will be deactivated within the contract.
Releasing an External User Subscription

An External User can be de-activated from a contract or their subscription may expire within a contract. To de-activate an External User from the contract, the user’s subscription must be released.

To release an External User subscription:

1. In the Subscription Management page, expand Manage Subscriptions. The list of subscriptions for the contract is displayed.

2. Select the subscription to be released.

3. Click Release in the Other group. A pop-up message box with the message “Selected users will be released. Are you sure you want to proceed?” appears.

4. In the pop-up message box, click OK. The message “Released Successfully” appears. The Release On field for the released subscription is auto-populated with the released date.

**Note:** Once an External User subscription is released, the subscription may be associated to a different External User.
Comments

This section illustrates the process to enter comments, while creating the records.

Pre-requisites:
To perform the following instructions:

- The user must have a valid user ID with an associated role.
- User roles must be assigned to the active contract.

Adding a new Comment

To add a new comment relevant to the record:

1. Expand the Comments section in the record and click Add. A New Comments form appears.

2. In the Comments field, enter the information specific to the record.

3. Click Save.

The details are saved in the grid.
<table>
<thead>
<tr>
<th>No</th>
<th>Comments</th>
<th>User</th>
<th>Date</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test</td>
<td>External SP C4: Record Review and Appr</td>
<td>23-Aug-16</td>
<td>Draft</td>
</tr>
</tbody>
</table>
Editing the Comment

To edit the comment in the record:

**Note:** Once a comment is added to the record, it can only be edited/deleted by the same user role that added it, only if the workflow stage of the record is unchanged.

1. Expand the **Comments** section in the record and select the grid to edit.

<table>
<thead>
<tr>
<th>No</th>
<th>Comments</th>
<th>User</th>
<th>Date</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test</td>
<td>External SP CA: Record Review and Approver</td>
<td>23-Aug-16</td>
<td>Draft</td>
</tr>
</tbody>
</table>

   **Field Details - Comments section**

2. Make changes in the **Comments** field.

3. Click **Save**. The details are saved in the grid.

   **Field Details - Edit Comments**
Deleting the Comment

To delete the comment in the record:

**Note:** Once a comment is added to the record, it can only be edited/deleted by the same user role that added it, only if the workflow stage of the record is unchanged.

1. Expand the **Comments** section in the record and select the grid to delete.

<table>
<thead>
<tr>
<th>No</th>
<th>Comments</th>
<th>User</th>
<th>Date</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Test</td>
<td></td>
<td>External SP CA: Record Review and Appr.</td>
<td>Draft</td>
</tr>
</tbody>
</table>

   2. Click **Delete**. A warning message appears.

   3. Click **OK**. The selected grid is deleted from the Comments section.
Attachments

WBCMS-MTO allows users to upload one or more attachments relevant to a contract, like geographical location images, site pictures, data sheets, documents etc., and view them in the image gallery of the contract details page. Attachments in a contract can be changed or deleted by the user who created it, only if the workflow stage of the record is unchanged.

Pre-requisites:
To perform the following instructions:

- The user must have a valid user ID with an associated role.
- User roles must be assigned to the active contract.

Creating New Attachments
To create a new attachment relevant to the record:

1. Expand the Attachments section in the record.
2. Enter in the Description of the file to be attached.
3. In the New Document section, click Choose File.
4. Select the file you want to attach and click Open. The attached file will be listed in Attachments section.
5. To delete the attachment, click Delete.

Note: When a user creates an attachment in the record, it can only be deleted by the creator of the attachment, until the user is a stakeholder in the record workflow.
Linking a Document

To link a new document relevant to the record:

1. Expand the **Attachments** section in the record.

```
1. Expand the Attachments section in the record.
```

2. Enter in the **Description** of the file to be attached.

```
2. Enter in the Description of the file to be attached.
```

3. In the **Link a Document** section, click **Choose File** to link a document. The Documents folder appears.

```
3. In the Link a Document section, click Choose File to link a document. The Documents folder appears.
```

4. Expand the Documents folder and click the record folder to open.

```
4. Expand the Documents folder and click the record folder to open.
```

5. Select the file in the folder selected and click **OK**.

```
5. Select the file in the folder selected and click OK.
```

The linked file will be listed in Attachments section.

```
The linked file will be listed in Attachments section.
```

6. To delete the attachment, click **Delete**.

**Note:** Once a Link is created in the record, it can only be deleted by the same user role that created it, only if the workflow stage of the record is unchanged.
Deleting Draft Records

Any records that are in "Draft" status can be deleted if required.

Pre-requisites:

To perform the following instructions:
- The user must have a valid user ID with an associated role.
- User roles must be assigned to the active contract.

Follow these steps to delete a record in ‘draft’ status:

1. Select the record in “Draft” workflow status.

2. In the General group, click Delete. A warning message appears.

   ![Image showing General group with Delete button highlighted]

   **Delete Action**

3. Click OK. The selected record is deleted from the records list page.
Viewing History

All the records have a history recorded.

Pre-requisites:
To perform the following instructions:

- The user must have a valid user ID with an associated role.
- User roles must be assigned to the active contract.

Follow the steps to view the history of a record:
1. Select the record from the list page and click **History** in the **Workflow** group.

The **Workflow History** form appears.

2. To view history in pdf, click ‘**Show History in PDF**’.
Change Logs

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 navigation pane, select the record from the list page and click 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.

4. Click Generate. Information filtered on the defined criteria is displayed.
Reports

The Reports feature in the Contracts module within WBCMS-MTO allows a user to generate various reports related to the contract. These reports help stakeholders, contractors, and external service providers to stay up-to-date on the status of all contracts.

Reports at Contracts List page:

1. From the Contracts List page, select the Reports in Others group.

   ![Contracts List page]

   Reports - Contract List page

2. Click on the report type to view the following reports:
   - Document Activities Report
   - Workflow Report

Reports at Records List page:

1. From the records list page, select the Reports in Others group.
2. Click on the report type to view the following reports:
   - Details Report
   - List Page Report
Business Process Updates

When a record requires an update, the new fields added to the record must be available for new contracts created only and not the existing contracts within WBCMS-MTO application. The existing contracts will continue to have the older configuration for that record without the updated fields included in the new configuration. There will be an In Effect date for these updated to records.
Document Management

The WBCMS-MTO Document Management System maintains a portfolio of various documents such as approved drawings, agreements, reports, records of implemented safety measures, contract files, lists, site and construction images, and other documents related to a contract. This module facilitates to store, manage attachments and updated documents.

Based on the type of contract, the initial set of folders in the Documents tree are auto-created by the application at the time of contract creation via the document template. No User(s) can delete these folders. However, based on the permissions configured for the user roles, user(s) can add, edit and upload documents into the folder/sub folders, refer Folder Management for more details.
Folder Management

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

Based on the permissions configured to the user roles in an active contract, WBCMS-MTO user can perform the following actions:

- Creating a Folder
- Modifying a Folder
- Deleting a Folder
Creating a Folder

Steps

1. From the contract 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 contract document tree.
Documents - New Folder
Modifying a Folder

Steps

1. From the Documents navigation tree, click and open a folder. The folder page is displayed.

2. In the Folder group, click Edit.

3. Make the required changes.

4. Click Save. The changes are saved to the folder in contract document tree.
Deleting a Folder

To delete a user-created folder, the required permission must be configured to the user role logged into the contract. Upon deletion, all the subfolders and its contents within that folder will be deleted from the system.

Steps

Note: The default Documents folder cannot be deleted. From the Documents navigation tree, click and open a folder created by the user to delete. The folder page is displayed.

1. In Folder group, click Delete. A warning message is displayed.

2. Click OK. The selected folder is deleted from the contract document tree.
Managing Documents

Documents can be stored, edited, downloaded and versions can be managed in the document folders.

Adding a Document

Steps

1. Expand the contract document tree; click a document folder or subfolder.

2. Click New in the General group. The New Document page is displayed.

3. In the Title box, enter the document description.

4. In the New Document field, click Select files. The Open dialog box is displayed.

5. Click the required document, and then click Open.
6. Click **Save**. The document is saved in the folder list page.
**Editing Document Properties**

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

- Update document metadata
- 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 contract.

**Steps**

1. From the documents list page, select a document.

2. Click **Edit Properties** in the **General** group. The Edit Document page is displayed.

3. Make the required changes.

4. Click **Save** to save the changes.
**Downloading Documents**

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

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

**Steps**

1. Expand **Documents** in the contract navigation pane, and then click the required folder.

2. Select a document.

3. Click **Get Document**.

   ![Documents - Get Document](image)

   The latest version of the document is downloaded to the local storage. For information on downloading a document version, refer **Managing Document Versions**.
Library

This section describes the WBCMS-MTO library and the procedures to manage catalogs, as well as to create, edit, view, and delete items in various library catalogs. The Library serves as a retrospective tool where you create, define, and store reusable information for reuse when you have to provide standard inputs to complete forms and information fields. For example, you may be required to enter information such as Contractor Details, Equipment, Material and Labor details, and other reusable information in the process of managing construction contracts.

The WBCMS-MTO library can 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 WBCMS-MTO application.

Standard Library Functions

Creating library data for all library items are similar in procedure. Viewing, editing, and deleting information from all Library data items is similar in procedure, and are described in the following sections.

Pre-requisites:
To perform the following instructions:

- The user must have a valid user ID with an associated role.
- User roles must have the permission to access the Library module.
Adding an Item

You can add library items to a catalog.

Note: We are using a library catalog “Aggregate” as an example to illustrate the Standard Library Functions.

Steps

1. Click Library in the module menu. The Library Management page is displayed.

2. Expand LIBRARY in the library navigation tree, and then click Aggregate. 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**.
The details are saved in the **Aggregate** catalog list page.

Library - Catalog list page
Adding Multiple 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.

**Note:** We are using a library catalog “Aggregate” as an example to illustrate the Standard Library Functions.

Steps

1. Click **Library** in the module menu. The Library Management page is displayed.

2. Expand **LIBRARY** in the library navigation tree, and then click **Aggregate**. The items in the selected catalog are displayed.

3. From the item list page, click **Excel Import / Export**.

4. Select either of the following:
   - **Excel Export** - Exports the items specified in the item list page.
   - **Excel Template Export** - Exports the item template.

5. Save the exported Excel workbook to your local storage drive.

6. Open the saved Excel workbook, and enter the library items, and the corresponding details.

   **Note:** The RecordID column of the worksheet must contain unique numbers. These identifiers are not available for display.

7. Save the Excel workbook with the library item information.
8. From the item list page, click **Excel Import / Export**, and then click **Excel Import**. The Import Details from Excel File page is displayed.

9. Click **Choose File** to select the workbook with library item information. The Choose File to Upload dialog box is displayed.
10. Select the required workbook, and then click **Open**.

11. Click **Upload**. The library items information from the Excel workbook is imported to the library catalog.
12. Click **Save**.

The items imported from the Excel workbook are uploaded to the library catalog.
Editing a Library Item

**Note:** We are using a library catalog “Aggregate” as an example to illustrate the Standard Library Functions.

**Steps**

**Note:** Library data cannot be edited if the Library item is used in a contract.

1. Click **Library** in the module menu. The Library catalog page is displayed.

2. From the Library navigation tree, click **Aggregate**. The items in the selected library catalog are displayed.

3. Select the required item from the catalog list page.

4. In the **General** group, click **Edit**. The **Aggregate** catalog page is displayed in edit mode.

   ![Aggregate Catalog Page](image)

   Library - Edit Library Catalogs

5. Make the changes in the editable fields as required and click **Save**. The details are saved in the **Aggregate** catalog list page.
Viewing a Library Item

Note: We are using a library catalog “Aggregate” as an example to illustrate the Standard Library Functions.

Steps

1. Click Library in the module menu. The Library catalog page is displayed.

2. From the Library navigation tree, click Aggregate catalog. The items in the selected library catalog are displayed.

3. Select the required item from the catalog list page and click View.

4. Click Cancel to return to the Aggregate catalog list page.
Deleting a Library Item

**Note:** We are using a library catalog “Aggregate” as an example to illustrate the Standard Library Functions.

## Steps

**Note:** Library data cannot be deleted if the Library item is used in a contract.

1. Click **Library** in the module menu. The Library catalog page is displayed.

2. From the Library navigation tree, click **Aggregate** catalog. The items in the selected catalog are displayed.

3. Select the required item from the catalog list page and click **Delete**.

![Aggregate Catalog](image)

Library - Delete Library Catalogs
A warning message is displayed.

4. Click **OK**. The selected item will be deleted from the library catalog list page.