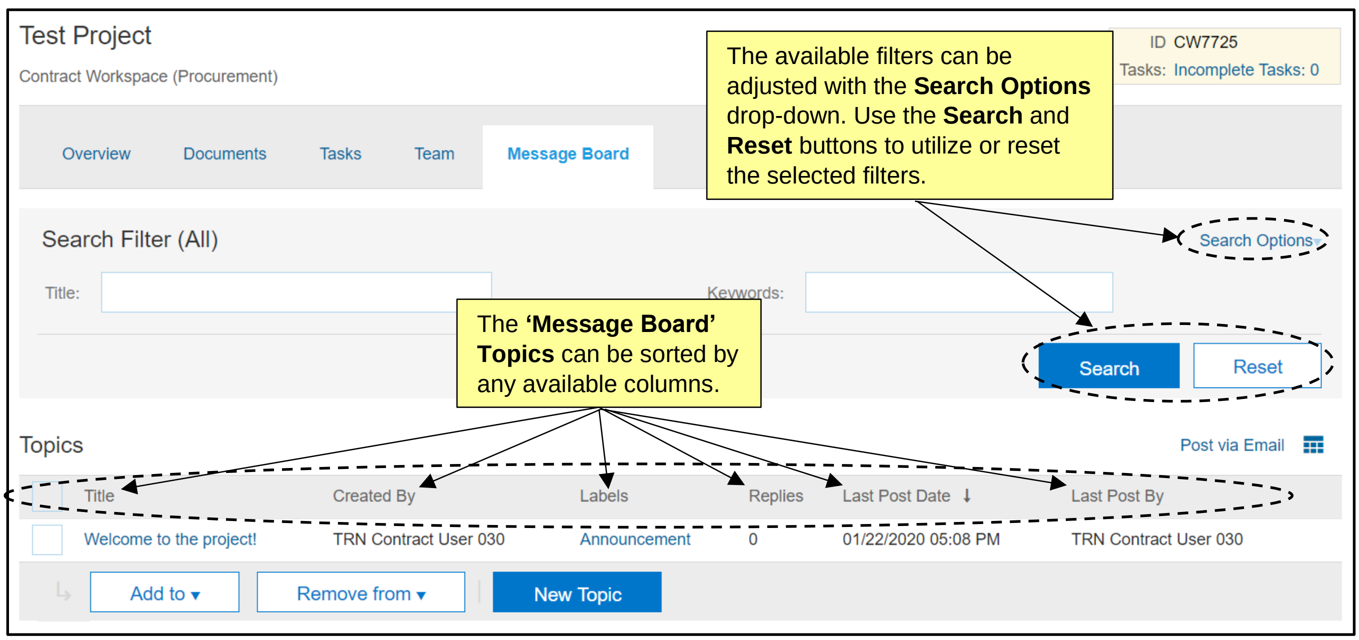
NC eProcurement

Tracking Contract Workspace Changes

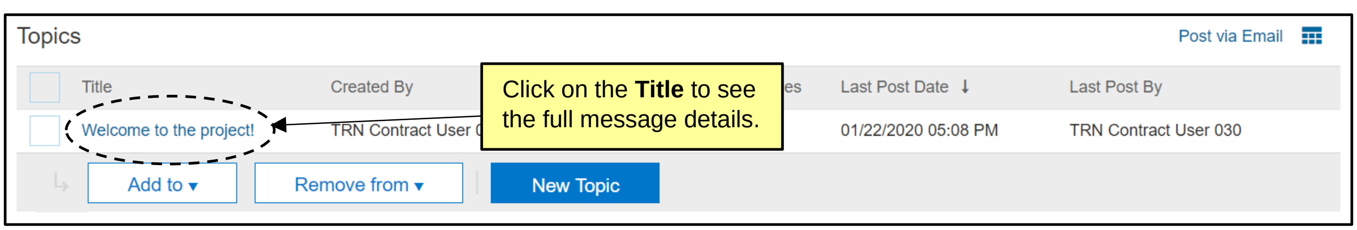
As a Contract Workspace (CW) is edited and discussed, all messages and changes are tracked so that they are accessible later. Messages are collected on the **'Message Board'** tab, and all changes are tracked on the **'History'** tab.

I. Using the Message Board

1. To navigate to this page, click on the **'Message Board'** tab at the top of the page.
2. Scroll down the page to see all the **'Topics'** for the Contract Workspace.
    a. Messages can be sorted by their fields: **Title**, **Created By**, **Labels**, **Replies**, **Last Post Date**, and **Last Post By**.
3. Use the **Search Filter** section on the top of the tab to search by **'Title'** or **'Keywords'** to narrow down the listed Messages.
    a. Additional **Fields** can be added to the **Search Filter** section using the **Search Options** drop-down menu on the right side. Search options can be shown or hidden from this drop-down, too.
    b. Click the **'Reset'** button to set the **Search Filter** back to the default settings.



4. To see the contents of a message and any posted replies, click the **Title** of the **Topic**.

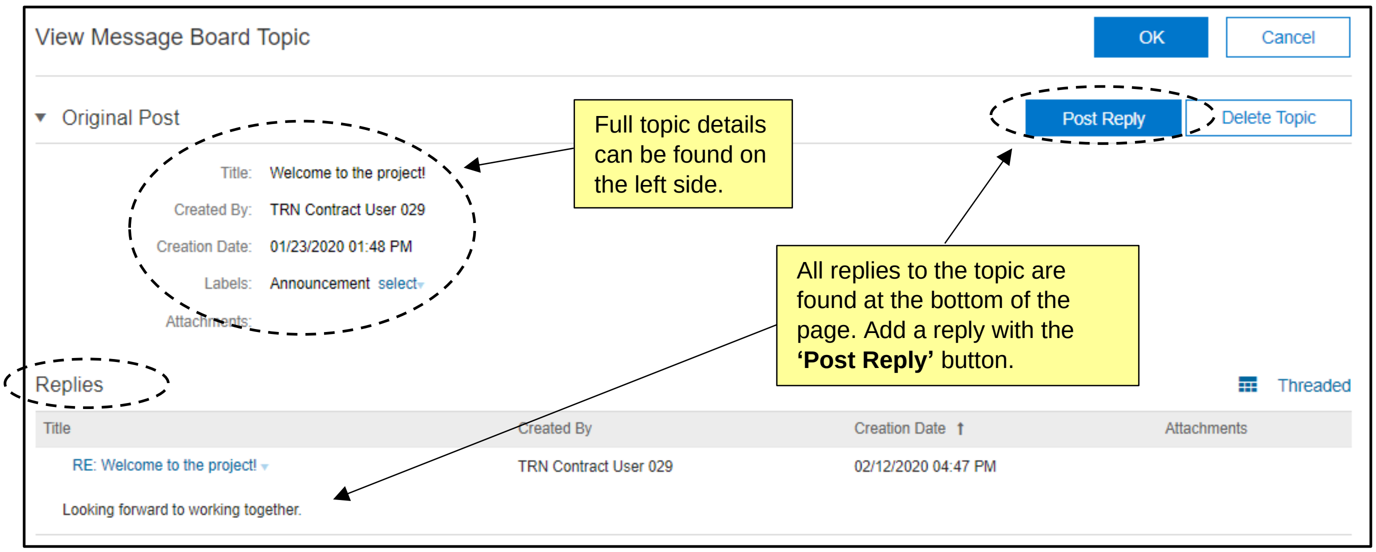


a. From this screen, all listed replies and attachments will appear.

b. Click **'OK'** when finished reviewing the message, or **'Cancel'** to exit without saving any changes.

c. The **'Post Reply'** button can be used to post a reply to the **Topic**.

d. If the user created the **Topic**, the **'Delete Topic'** button will appear in the upper right, allowing the user to remove the **Topic** from the Contract Workspace.



5. To apply a **Label** to a **Topic**, check the box to the left of the topic's **Title** and use the **'Add to'** drop-down menu to add it to one of the preset **Label**s. The **'Remove from'** drop-down can be used to remove a **Label** from a **Topic**.

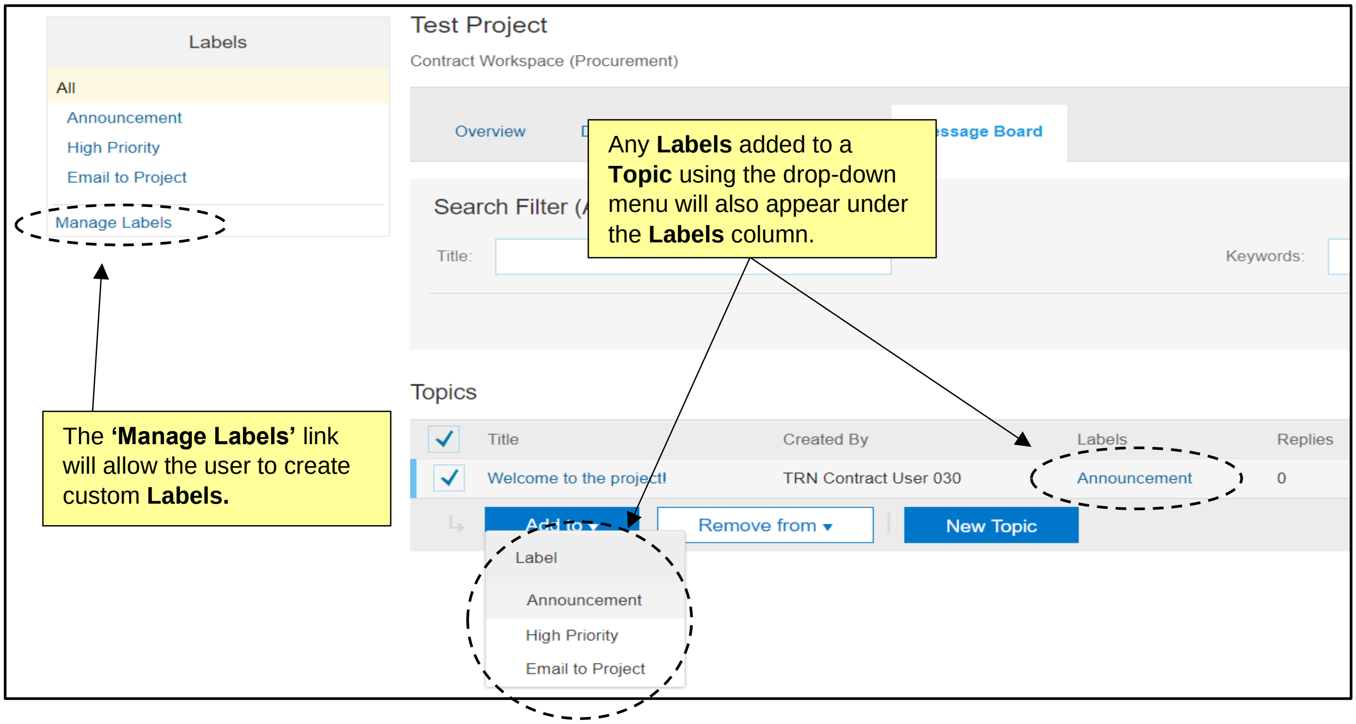
   Note: Multiple **Topics** may be added to or removed from a **Label** at the same time. Simply check the box next to more than one **Topic**, then use the **'Add to'** or **'Remove from'** drop-down menu as normal to mass edit the **Topics** to their selected **Labels**.

6. To manage **Labels** for the Contract Workspace, use the **'Manage Labels'** link on the left side of the page. The **Label Editor** will display, and clicking the **'+ Add a new Label'** link will allow for the creation of any custom **Labels** to be used with the **Topics**, along with an optional description.

   a. Custom **Labels** may be edited, moved up and down the list of labels, or deleted using the options on the right side of the **Label Editor** and selected the **'Save Changes'** button.

   b. If a **Label** is deleted from the Contract Workspace, it will be automatically removed from every **Topic** that previously had been assigned that **Label.**

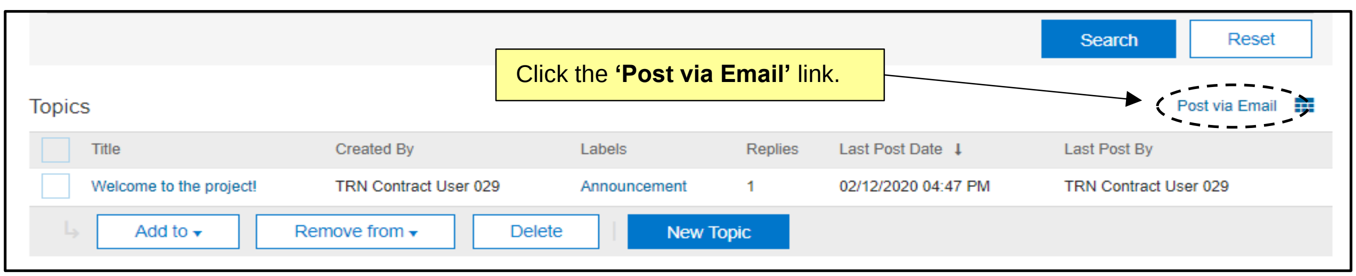
   Note: Only custom **Labels** may be edited. **'Announcement,' 'High Priority,'** and **'Email to Project'** are System **Labels** and are unable to be edited or removed from the Contract Workspace.



II. Tracking Emails in the Message Board

1. Emails exchanged outside of the Contract Workspace can also be added to the Message Board.

    a. Click the **'Post via Email'** link beneath the **'Search'** button,



    b. A popup box will display with a unique email address for this Contract Workspace. Copying that email address in any future email exchanges or in a reply to an existing email chain will add those messages, along with any attachments, to the **Message Board** with the subject of the email becoming the **Title** of the **Topic**.

III. Using the History Tab

1. To navigate to this page, click on the **'History'** tab at the top of the Contract Workspace.

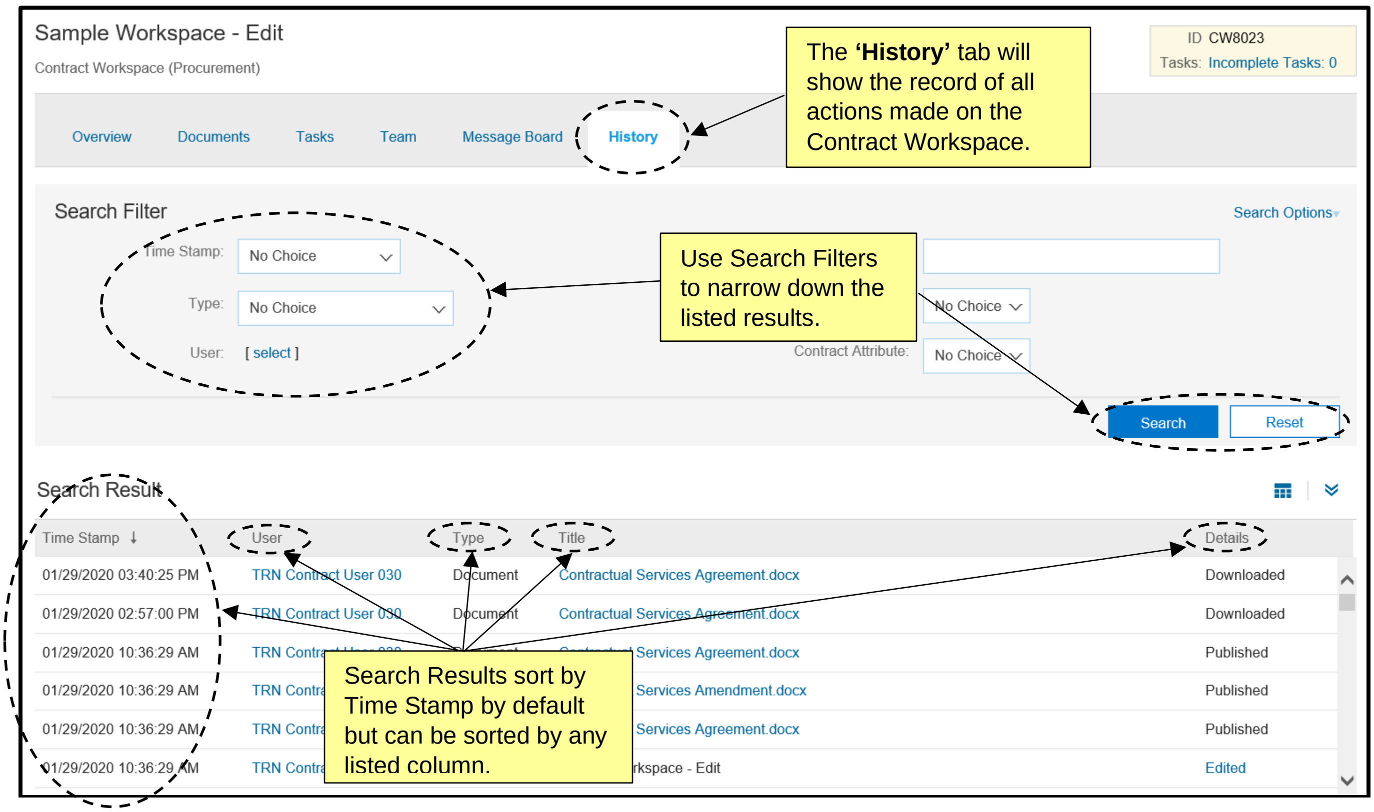
   Note: Only **Project Owners** will see this tab. It will be hidden for all other users.

2. Like the **'Messages Board,'** using the **'Search'** button in combination with selected **Search Filters** makes finding changes easier for the user.

   a. Additional **Fields** can be added to the **Search Filter** section using the **Search Options** drop-down menu on the right side. Search options can be shown or hidden from this drop-down, too.

   b. Click the **'Reset'** button to set the **Search Filter** back to the default settings.

3. **Search Results** are sorted by **Time Stamp** by default but can be sorted by any listed column.



4. Clicking the **Table Options Menu** icon located on the right side above the **Search Results** will display a drop-down menu. From this menu additional columns may be added or hidden, the results may be grouped by columns, or the data may be exported to Excel.

   Note: Any additional Columns that are added to the Search Result field can also be used to sort and group the **Search Results**.

5. The **Double-Arrow** icon to the right of the **Table Options Menu** icon will expand the **Search Results** to show a much larger **Search Result** box, reducing scrolling to see the top search results.

6. Clicking on the **User** will display details for that user, and clicking the **Title** will navigate directly to a page with more information about the folder, document, team, etc., that was changed, each with their own version history if applicable.