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 Labels. 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.

The **Table Options Menu** icon provides other options for how the Search Results can be displayed.

Selecting **User** or **Title** will provide more specific details about the user or action selected.

The **Double-Arrow** icon expands the size of the Search Result window.