NAVFAC
Naval Facilities Engineering Command

INFORMAL PARTNERING PORTFOLIO

QUICK START GUIDE

CONSTRUCTION PARTNERING

INFORMAL PARTNERING

TABLE OF CONTENTS

1.0 INTRODUCTION

1.1 Purpose of the Quick Start Guide

The purpose of this Quick Start Guide is to provide you with a step-by-step resource to effectively use the Informal Partnering Portfolio (the BMS-based resource with all necessary forms used during the meeting). The Informal Partnering Portfolio (Adobe PDF file) is used in conjunction with the Informal Partnering Facilitation Video during the initial meeting. Together, both tools will lead the Partnering Team through the meeting and ensure all relevant information is captured.

In order to become familiar with the Portfolio, it is recommended that you download a copy to your computer to become familiar with its features and attributes. This will ensure that you can effectively operate the Portfolio during the Informal Partnering meeting.

1.2 What is Covered in the Quick Start Guide?

- How to use the Informal Partnering Portfolio.

Throughout the Quick Start Guide, you will see FYI icons. These icons identify recommendations and tips to help make the process more effective and efficient. Here's the first FYI…

fyi

- ➢ View the videos/DVDs in their entirety, from start to finish.
- ➢ Become familiar with the Informal Partnering Portfolio.

2.0 WHAT YOU NEED TO OPERATE THE PORTFOLIO

- Adobe Acrobat Professional version 9.0 or later.

fyi

> ➢ If your system does not have Adobe Professional, Adobe Reader is your default viewer. Without Adobe Professional, you will not be able to use the functionality of the forms contained in the Portfolio including the ability to save changes, print and digitally sign and secure forms. Contact your local CIO to have Adobe Professional installed on your computer.

3.0 HOW TO USE THE INFORMAL PARTNERING PORTFOLIO

The Informal Partnering Portfolio (Adobe PDF file) is used in conjunction with the Informal Partnering Facilitation Video during the initial Informal Partnering Meeting. Together, both tools will lead the Partnering Team through the meeting and ensure all relevant information is captured.

fyi

- Save a copy of the Portfolio to your desktop, and become familiar with the contents and features for all editable forms.

- JavaScript option must be enabled for Print and Reset (clears all fields) functions to work. If this option is enabled, you will see a purple notification bar at the top of the screen. If this option is not enabled, the bar will be yellow. See Sections 3.5, 3.6 and 3.7 for instructions on enabling JavaScript.

Upon completing the initial Informal Partnering Meeting, the Portfolio and its contents may be saved and electronically distributed to all participants. Refer to the Informal Partnering Toolkit, NAVFAC Business Management System (BMS) Partnering section or the NAVFAC Total Force Training (TFT) site for additional information and guidance. All revised material, if applicable, is posted on the BMS.

3.1 Welcome Page

When you open the Informal Partnering Portfolio PDF file, you will see the Welcome Page (Figure 1). This page contains a brief set of directions and identifies all editable forms provided in the Portfolio.

Figure 1: Welcome Page

- SAMPLE forms are included in the Portfolio to provide a reference of the types of information typically captured during the initial Informal Partnering Meeting.

3.2 Using the Menu Bar

When the Portfolio is initially opened, the PDF Portfolio Toolbar 

is provided in the upper left section of the Portfolio screen (Figure 2). This is your primary Toolbar for navigating the Portfolio. To access the forms in the Portfolio from the Welcome Page, select the 

button.

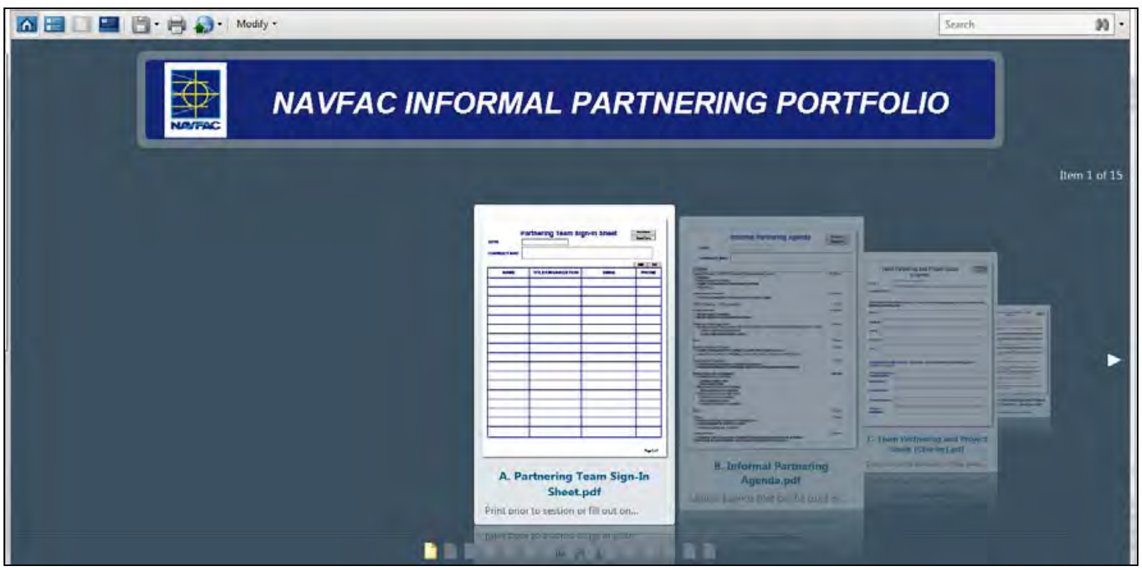


Figure 2: Portfolio Menu Screen

➢ A description of the PDF Portfolio toolbar buttons is shown in Figure 3.

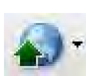
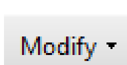
	Takes you **Home** to the fan view of all forms
	**List** view helps you navigate through files using their details
	**Previews** the selected file
	**Opens** the Welcome Page
	**Saves** the entire Portfolio, as well as individual forms
	**Prints** your selected PDFs in the Portfolio
	**Shares** Portfolio with others
	**Edits** Portfolio contents

Figure 3: Explanation of Portfolio Toolbar Buttons

After selecting the GET STARTED button, you have access to all forms in the Portfolio. The forms in the Portfolio are provided in order of use during the initial Informal Partnering Meeting. You may page through the Portfolio by selecting either the document icons located at the bottom of the screen or by using the **Previous Page** and **Next Page** arrows.

3.3 Navigating to a Portfolio Form

During the Informal Partnering Meeting, one of the most efficient ways to navigate and work through the Portfolio and its forms is to use the navigational arrows located in the upper left section of the screen under the Portfolio Toolbar. Once you have opened any of the forms (Figure 4), the name of the form A. Partnering Team Sign-In Sheet.pdf currently in use, as well as the navigational arrows, are provided. Using this navigational bar along with the Save Portfolio option will allow you to enter all information into a form, save the information in that form and page over to the next form.

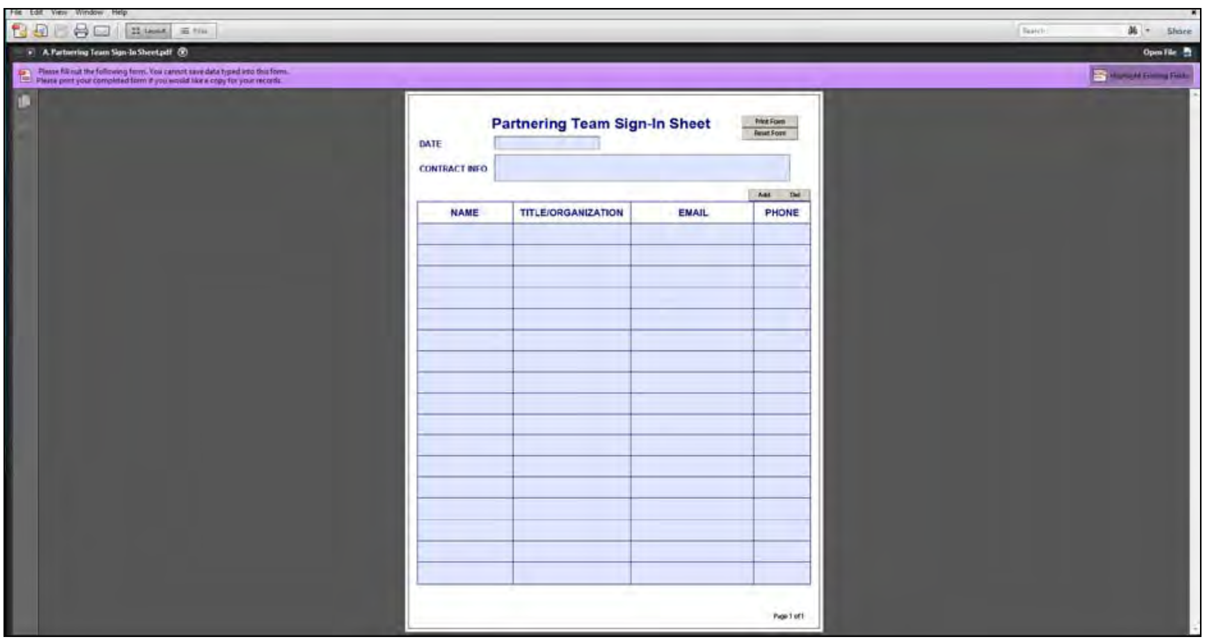


Figure 4: Example - Partnering Form

fyi

- See Section 3.9 for additional information on how to save a form.

3.4 Customizing the Portfolio

Prior to, during or after the meeting, you may want to customize the Portfolio by adding or deleting documents, files or folders. For example, you may want to include a copy of the Charter Signatures and Team Photo as part of the Portfolio.

To delete a SAMPLE form (Figure 5), right-click on that form in the Portfolio View and select Delete. Additional files such as PDF, Word, Excel, JPG, etc., can be inserted into the Portfolio.

To add a file to the Portfolio, right-click anywhere inside the Portfolio View and select the Add Files... option. Portfolio file order is alpha-numeric. If you require sequential order for specific documents, files or folders in the Portfolio, name them accordingly.

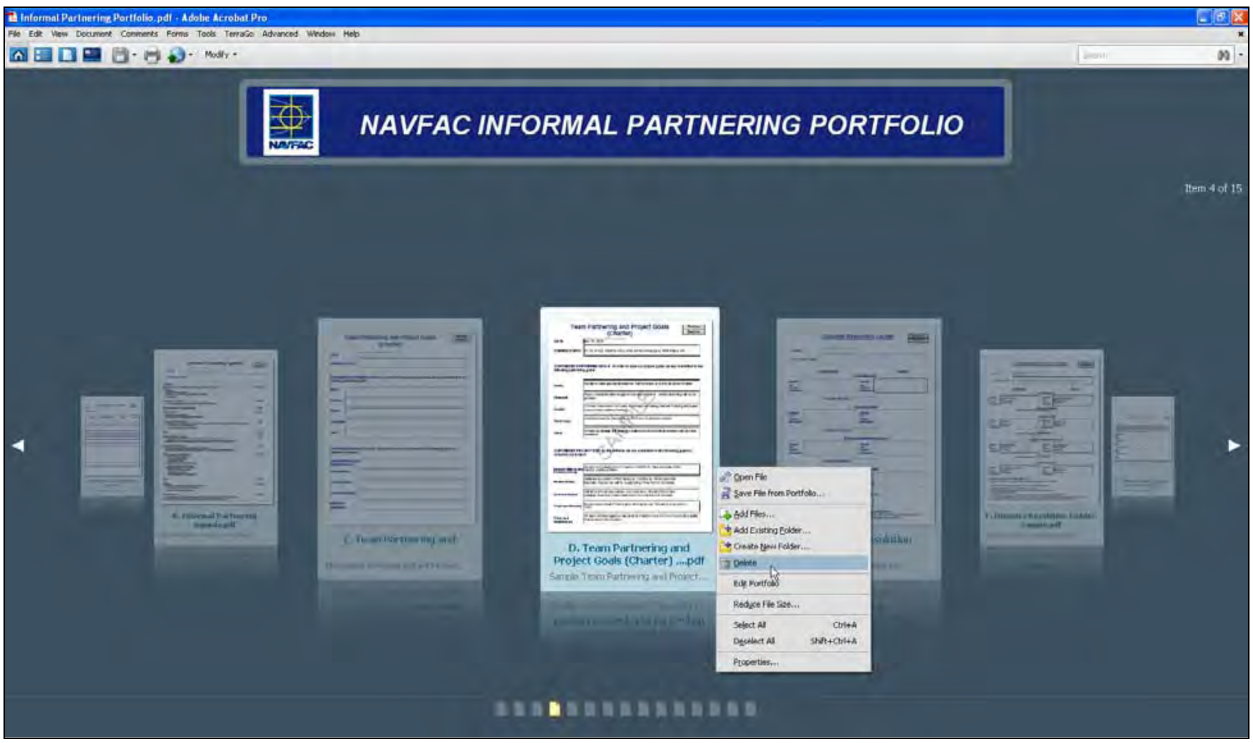


Figure 5: Deleting a Form View

- ➢ Documents such as the Partnering Team Sign-In Sheet, Charter Signatures and Team Photo must be scanned and/or imported into the Portfolio to capture original signatures or images.

3.5 Enabling JavaScript to Activate Print and Reset Functions

There are two options for enabling JavaScript: for each editable form (Section 3.6) or for the entire Portfolio (Section 3.7).

- If the JavaScript option is enabled, you will see a purple notification bar at the top of the screen. If this option is not enabled, the bar will be yellow.

The next sections provide instructions on how to enable JavaScript.

3.6 Enabling JavaScript for One Form

To enable JavaScript for one form, use the following as an example. Open the Disputes Resolution Ladder Form by double-clicking on it in the Portfolio View. In the top right section of the screen, select the Options pull-down menu in the yellow information bar (Figure 6) and enable JavaScript for this form by selecting Enable JavaScript for this document one time only.

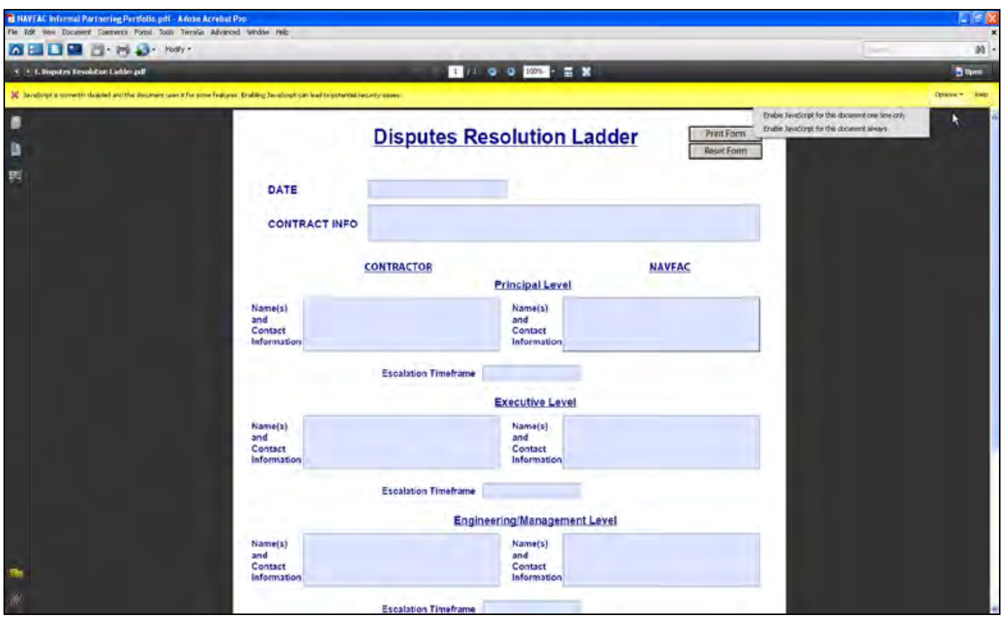


Figure 6: JavaScript Form View – Disabled (yellow bar)

Once JavaScript has been enabled for this specific document, the yellow notification bar will turn purple (Figure 7) meaning that the Print Form and Reset Form buttons now work. You may now populate the fields with information and Print or Reset the form to its original state.

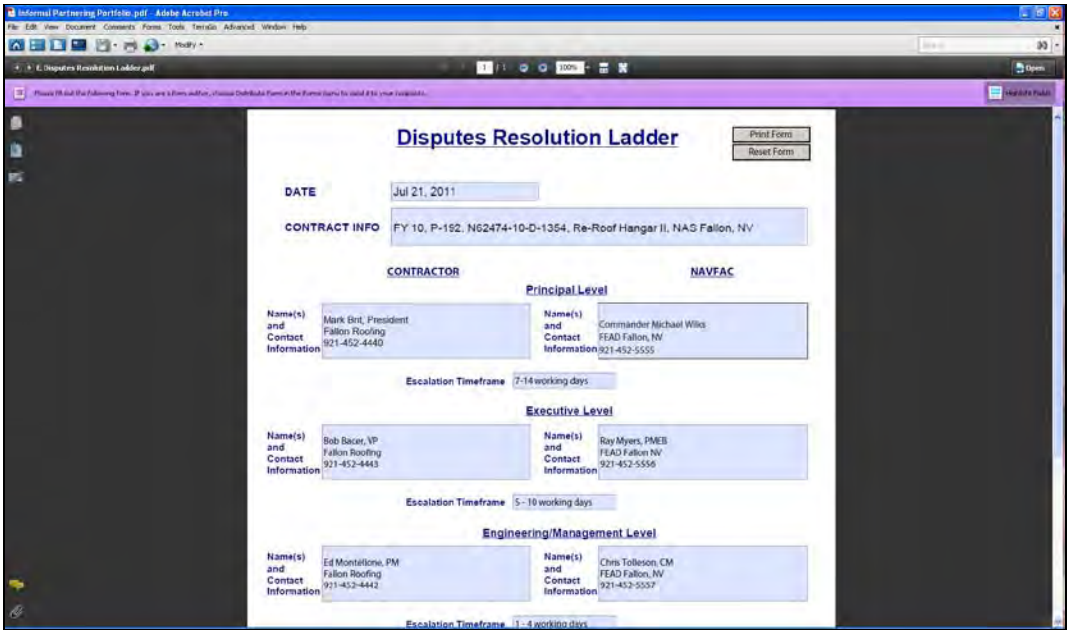


Figure 7: JavaScript Form View - Enabled (purple bar)

- Regardless of the status of JavaScript, enabled or disabled, information can be populated and saved in the forms when using Adobe Professional. Therefore, you may populate all forms during a meeting and save that Portfolio for immediate electronic distribution to participants using the “Share this Portfolio with others” icon located in the Portfolio Toolbar.

3.7 Enabling JavaScript for All Forms

To enable JavaScript for all forms in the Portfolio, navigate to the ✔ Cover Sheet by selecting View > Portfolio > ✔ Cover Sheet as shown in Figure 8.

Figure 8: Enabling JavaScript for all Forms

Select the Options button in the upper right section of the information bar to view the pull-down menu and select Enable JavaScript for this document always.

All Print and Reset buttons on all editable forms in the Portfolio are now working. After selecting the Enable JavaScript for this document always option, the Portfolio will default back to the Welcome Page.

3.8 Accessing Forms After Enabling JavaScript for all Forms

From the Welcome Page, you may access the Portfolio forms by selecting the Home Icon located in the Portfolio Toolbar or by selecting GET STARTED. Selecting the Home Icon allows you to visually navigate through the Portfolio files using the Previous Page and Next Page arrows.

3.9 Saving Information in a Portfolio Form

Each form is formatted to capture the date and contract information, such as contract number and title. Once these fields have been populated and all relevant information has been captured during the meeting, you may save your information by selecting the Save Portfolio option located in the Portfolio Toolbar pull-down menu of the Save icon (Figure 9).

- ➢ Save information for each form in the Portfolio once that section of the meeting is complete. Once the entire meeting is finished and all forms have been populated with your Partnering information, you may save your Portfolio and assign it a name by selecting the Save Portfolio As… option located in the Portfolio Toolbar pull-down menu.

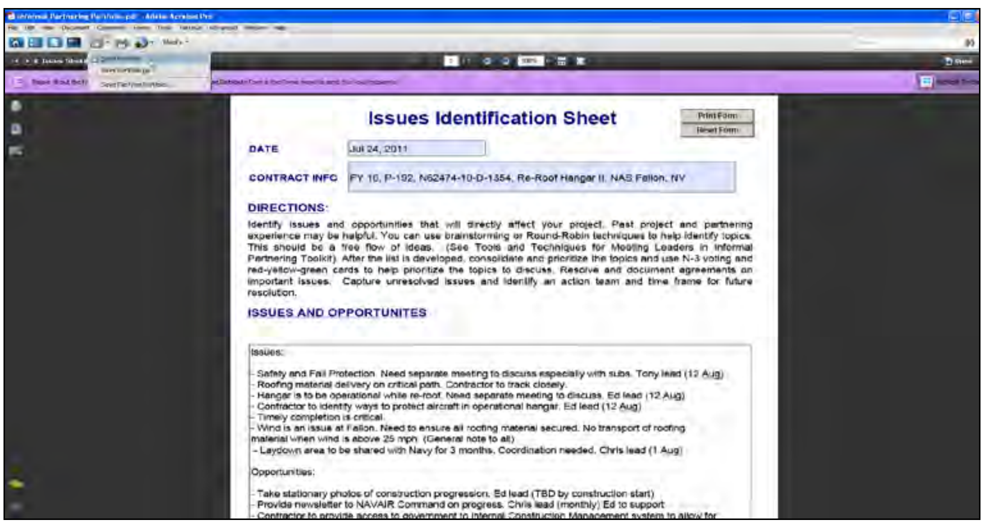


Figure 9: Saving Information in a Portfolio Form

3.10 Securing the Portfolio

Securing the Portfolio will allow you to digitally sign, date and maintain version control of all documents. To secure all documents in the Portfolio, the ✔ Cover Sheet must be digitally signed. Digitally signing one of the component documents in the Portfolio will not secure the Portfolio.

No matter where you are located in the Portfolio, you may easily navigate to the ✔ Cover Sheet by selecting View > Portfolio > ✔ Cover Sheet (Figure 10).

Step 1 Navigate to the ✔ Cover Sheet and insert your Digital Signature.

Figure 10: Securing the Portfolio

Step 2 To insert your digital signature, select Advanced > Sign & Certify > Sign Document (Figure 11).

Figure 11: Inserting a Digital Signature

Step 3 Once you have selected Sign Document, the pop-up screen will appear. Then, click "OK" (Figure 12).

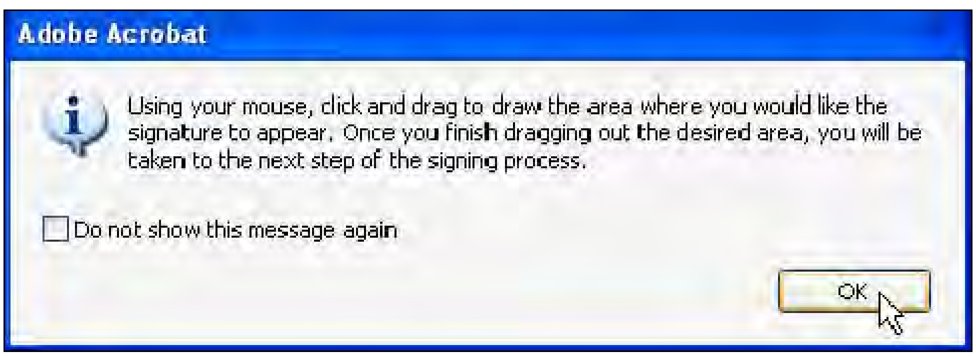


Figure 12: Selecting the Digital Signature Area

Step 4 Using your mouse, click and drag to draw the area where you would like the signature to appear on the ✔ Cover Sheet.

Step 5 Once you have identified the area on the Cover Sheet where your digital signature will be inserted, the **Sign Document** pop-up screen will appear (Figure 13).

Figure 13: Signed Portfolio View

Step 6 To lock the Portfolio and all component documents, check the ☑ Lock Document After Signing box and select Sign (Figure 14).

Figure 14: Lock Document View

The Portfolio has now been **secured** and your Digital Signature has been inserted on the Cover Sheet (Figure 15).

Figure 15: Secured Portfolio View

Congratulations! You have now completed all portions of the Quick Start Guide for the Informal Partnering Portfolio.

4.0 FREQUENTLY ASKED QUESTIONS (FAQS)

1. **Q. Is Partnering required on my project?**
   A. Partnering is required on ALL NAVFAC Contracts. The Informal Partnering Program is scalable and can be customized to meet all Informal Partnering requirements.

2. **Q. I opened the Informal Partnering Portfolio and cannot save entries, print, or digitally sign forms.**
   A. Your system may not be installed with Adobe Acrobat Professional version 9.0 or later. Without Adobe Professional, you will not be able to use the functionality of the forms contained in the Portfolio including the ability to save changes, print and digitally sign and secure forms. Contact your local CIO to have Adobe Professional installed on your computer.

3. **Q. When I open the Portfolio, why do I have a yellow bar at the top?**
   A. The yellow bar means that the JavaScript option is currently disabled. Once JavaScript has been enabled for this specific document, the yellow notification bar will turn purple meaning that the Print Form and Reset Form buttons now work. Follow the instructions in Sections 3.5-3.7 to enable JavaScript.

4. **Q. What is the purpose of the digital signature?**
   A. The digital signature creates a “time stamp” and allows users to know if/when the PDF Portfolio has been modified and by whom.

5.0 SUPPORT

Technical Support
NMCI Help Desk: 866-843-6624

USN Service Desk: servicedesk_Navy@nmci-isf.com

USMC Service Desk: servicedesk_USMC@nmci.usmc.mil

Program Support
If you have questions or comments pertaining to the NAVFAC Informal Partnering Program, NAVFAC Partnering BMS, Informal Partnering Toolkit, Informal Partnering Portfolio or Quick Start Guide, please submit all to your respective Facility Engineer Commands (FECs) CI5. Or, you may provide comments or suggestions by selecting the **Feedback** Tab located on the Home Page. Thank you.