eCMS Processes and Procedures

Contractor Users

Update August 2019

Prepared by CACI International, Inc.

Cover Photo

140806-N-PA772-001 JACKSONVILLE, Fla. (Aug. 6, 2014) U.S. Navy photo by Earl Bittner/Released

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UPDATES

Date	Version	Summary of Changes
July 2017	1.0	First complete draft released
Aug 10	1.1	Added Section 1.4
December 2017	2	Updated screenshots to match new system look and feel Incorporated process changes and updates into documentation
February 2018	2	Updated Intro
September 2018	3	Updates to Submittal Process; Added Site Management Instructions
January 2019	4	Updates to changing password and the new RFI and Submittal processes after upgrade. Added Section 1.4.3, Section 1.5, Section 5.4.1, and Section 5.4.2.
July 2019	4.1	Added the User Dashboard to Section 2; Updated FAQs; Updated screenshots for RFI, Submittals, and Daily Report

1. GETTING STARTED

1.1. Purpose and Background

NAVFAC is developing an Electronic Construction and Facility Support Contract Management System (eCMS). This effort will streamline complex processes; use best practices and techniques to manage costs, schedules, execution efficiency; and deliver services that fully meet the Command's readiness requirements. This manual serves as a reference for Contractor Users.

eCMS will offer:

- A localized platform to submit, review, and respond to Requests for Information (RFIs) and Submittals for NAVFAC Construction and NAVFAC Facilities Support Contracts (FSC)
- An easy system to track project management and team members
- A place to store documents and files related to an RFI or Submittal
- A list of Action Items and a Calendar to help team members stay organized
- A system to capture the communications, decisions, and information related to the lifecycle of a project

eCMS will be used by both NAVFAC personnel and contractors.

1.1.1 UFGS Section 01 31 23.13 20

UFGS Section 01 31 23.13 20 "Electronic Construction and Facility Support Contract Management System" covers the requirements for the Navy use of NAVFAC's web-based eCMS. It establishes that "eCMS is the designated means of transferring technical documents between the Contractor and the Government." Further, "the Contractor will be provided access to eCMS," and "Project roles and system roles will be established to control each user's menu, application, and software privileges…" Refer to Section 01 31 23.13 20 for further requirements regarding the use on eCMS.

1.2. Users

1.2.1 Active and Passive Users

Different users will have different permissions and responsibilities within the eCMS System. NAVFAC Users and Contractors will have different screens. NAVFAC will have active users and passive users. **Active Users** are actively working on the project. **Passive Users** will have read-only access.

1.2.2 Contractor (KTR) Active Roles

KTR personnel will be Active Users within eCMS. All correspondence to the Government (GOV) will be through (initiated by) the KTR and only KTR personnel will have access to the platform. Subcontractors and vendors will have to submit items to the KTR for issuance to the GOV. No KTR passive roles are currently anticipated.

To access and work within the program, KTR active users must be assigned a 'project role' that will establish the permissions and responsibilities within the system. The five primary project roles are:

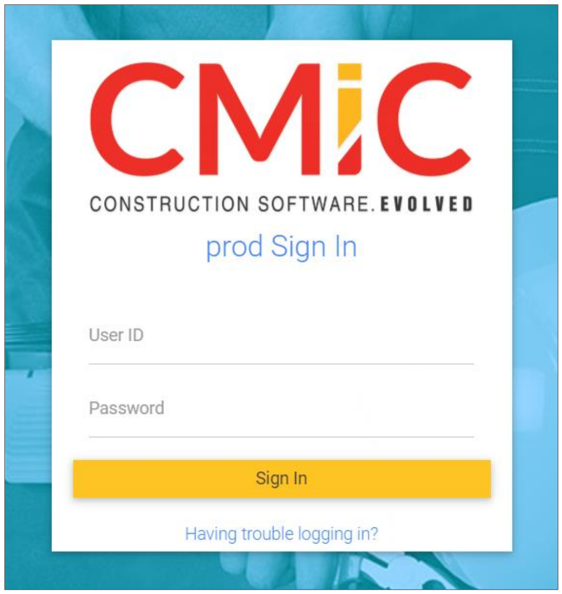
- Project Manager,
- QC Manager,
- Site Safety Health Officer (SSHO),
- Superintendent, and
- Designer of Record (DOR2) for Design Build

Multiple personnel can be assigned to a project role. While it is anticipated that the KTR Project Manager will be the primary conduit for submitting project documentation to the GOV, initially all KTR project roles will have similar permissions and responsibilities and will have the capacity to submit items and view status.

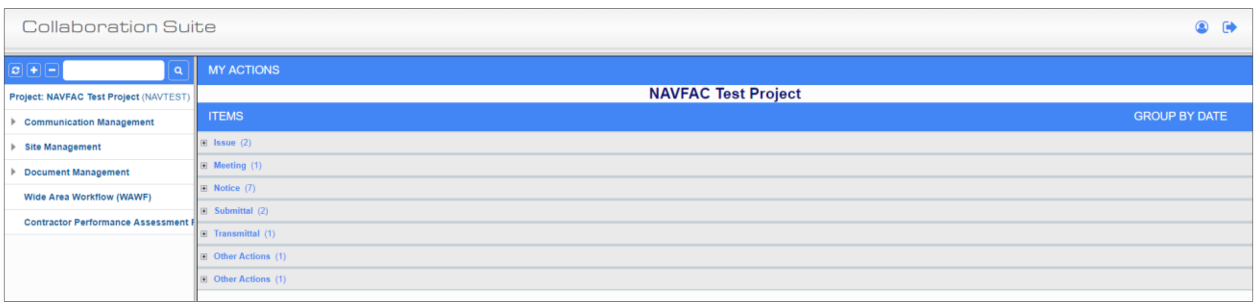
1.2.3 Logging In

UFGS Section 01 31 23.13 20 requires the KTR to provide a list of personnel requiring access to eCMS within "20 calendar days of contract award." Provide the list to the GOV Contracting Officer's Representative (COR) or Construction Manager (CM). The minimum information required is First Name, Last Name, E-Mail Address, Project Role (as defined above), and Phone Number (if available). Any personnel additions, deletions, or changes throughout the project will require a resubmission of the list for GOV approval. A System Administrator will provide the KTR with a URL, User Name, and Temporary Password for initial access to eCMS.

When visiting the URL that has been provided to access eCMS, a login screen will appear.



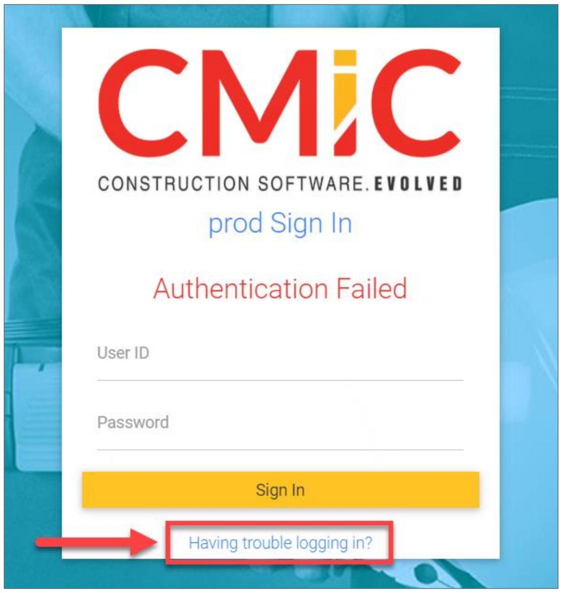
Type your User Name and Password in the blank fields and click the yellow **Sign In** button. This will open the home screen of the system.



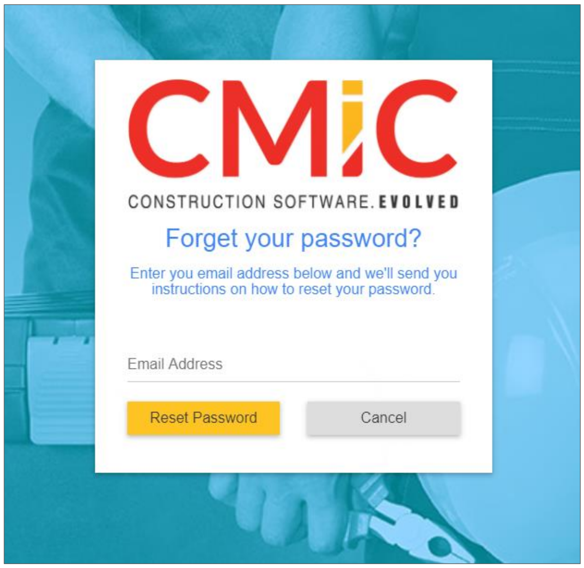
1.2.3.1 Changing Password

Upon first login, please change your password immediately. Please refer to ***1.2.3.2 System Contact Info***.

If you have forgotten your password, click the **Having trouble logging in?** on the login screen.



Then, enter your e-mail address in the textbox, and click **Reset Password**.



You will receive an e-mail from accounts@cmic.ca with the link to change your password. Click on the link, enter your User ID and new password and click on **Change Password** button.

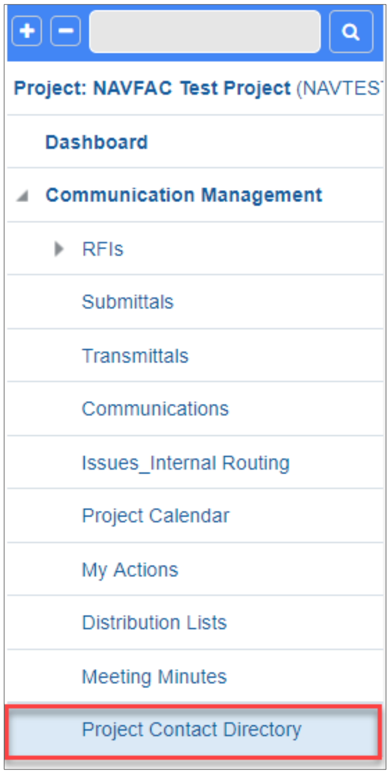
The DOD password standards are as follows:

Must be at least 14 characters in length.

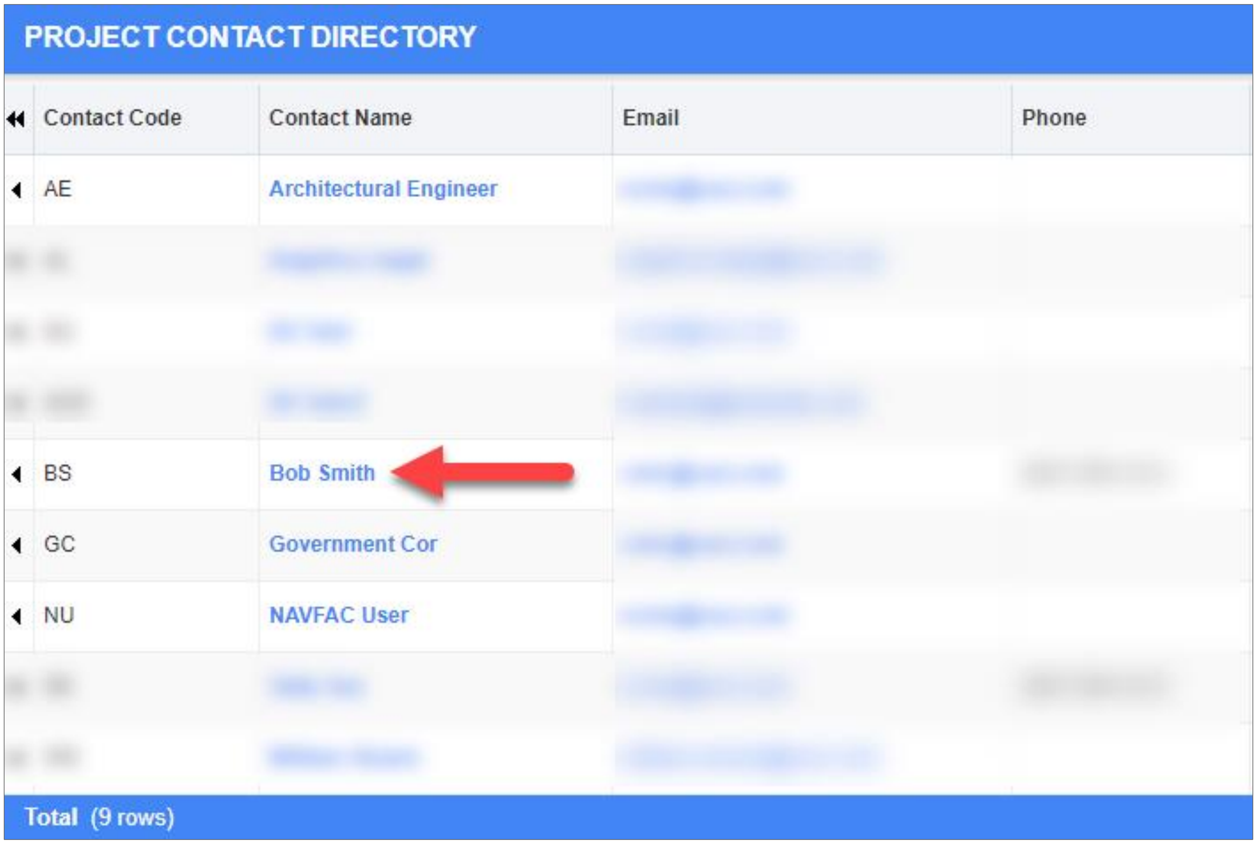
- Must contain at least:
  - Two uppercase letters [A-Z]
  - Two lowercase letters [a-z]
  - Two digits [0-9]
  - Two special characters [e.g.: !@#$&*]
- A new password should differ from the changed password by at least 4 characters.
- A password cannot contain your network account name, username or display name.
- A password cannot be changed to any of the most recent 24 passwords.
- Must be changed no less frequently than every 60 days.
- Cannot be changed more frequently than once per day.

1.2.3.2 System Contact Info

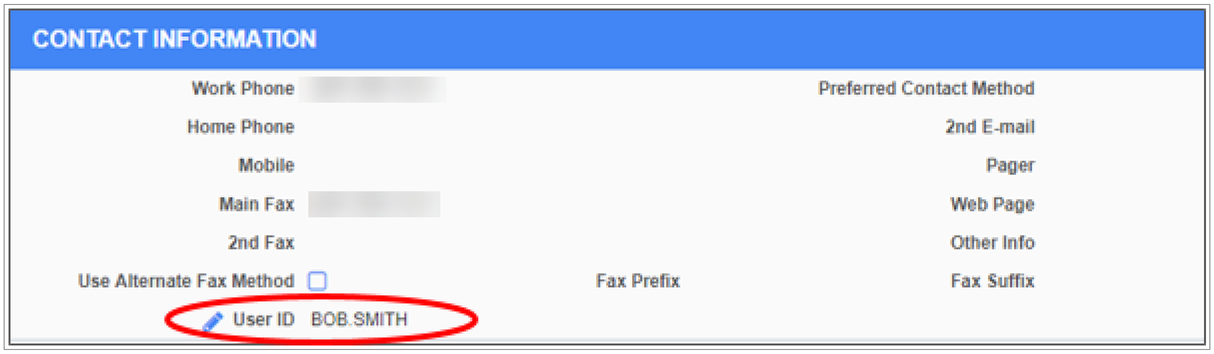
Each user will have an individual profile created prior to their first login to eCMS. To change your password, go to the Navigation Pane on the left column of the screen and open the **Communication Management** folder (If you do not see this folder, please refer to ***Section 1.3.1 Navigation Pane***). Click **Project Contact Directory**.



This will open a screen with contact information for everyone on the project team. Scroll to your name and click on the name under the **Contact Name** column. If any changes need to be made to your User Profile, contact to COR or CM of the project, and they will be able to make the necessary changes.



This will open your User Profile for the project. At the bottom of your record is a **User ID** field. Click the **pencil icon** next to this field to change your password.

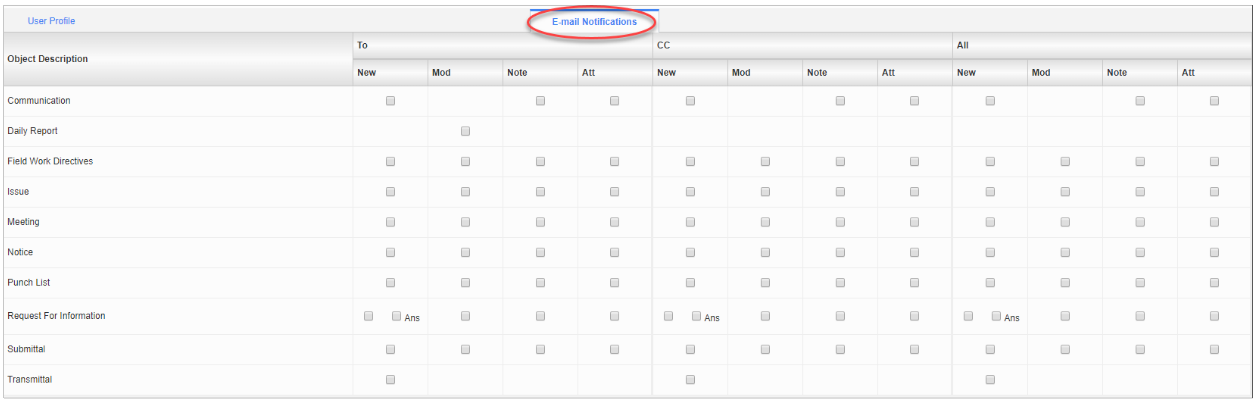


A popup box will open with the option to change the password. Click on the **pencil icon** next to the password field. Change and confirm your new password and click the **Save** button.

If you need to update any other part of your User Profile, you will need to contact the COR or Construction Manager (CM) of the project and request the changes. Once all updates have been made, click **Save**.

1.2.3.3 E-mail Notifications

eCMS allows users to set their notification preferences to receive e-mails when information or changes are added to the system. To do this, start from your User Profile screen in the Project Contact Directory. To edit e-mail notification settings, select the e-mail notifications tab.



On this screen, you will see three columns at the top for To, CC, and All. These represent your role in one of the fields listed under the Object Description column, such as Communications, Daily Reports, or Requests for Information. Under each column, there are boxes next to each object description field. For example, under the “To” column, if you check the box under New for Notice, you will receive an e-mail notification whenever a Notice is created where you are listed as the recipient in the “To” column. You also have the option of receiving notifications for changes to fields listed under the object descriptions where you are in the CC distribution or for All changes.

If you want to always receive an e-mail notification when a **Punchlist** is sent to you in eCMS, check the box in the column labeled new under the **To** heading. You would check the **Mod** box to receive an e-mail every time a modification is made to Punchlists submitted to you. You would check the **Note** box to get an e-mail every time a note is added to a Punchlist in that project, and the **Att** box to receive e-mails when attachments are added to Punchlists. After you have selected your preferences, click the **Save** button in the top, right corner of the screen.

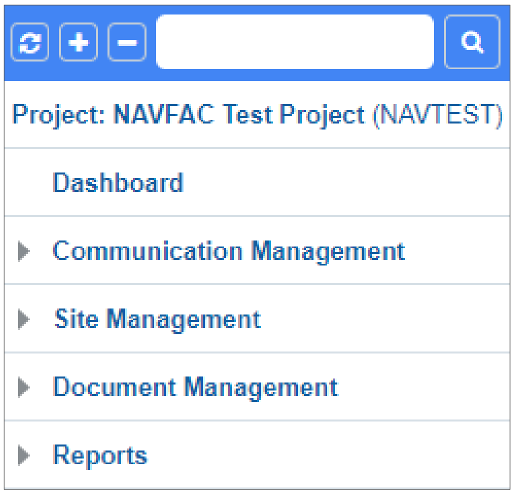
Object Description	To			
	New	Mod	Note	Att
Communication	☐		☐	☐
Daily Report		☐		
Field Work Directives	☐	☐	☐	☐
Issue	☐	☐	☐	☐
Meeting	☐	☐	☐	☐
Notice	☐	☐	☐	☐
Punch List	☑	☑	☑	☑
Request For Information	☐ ☐ Ans	☐	☐	☐
Submittal	☐	☐	☐	☐
Transmittal	☐			

E-mail notifications must be set for each new project. If you are getting too many notifications, this is also the screen to turn them off.

1.3. System Features

1.3.1 Navigation Pane

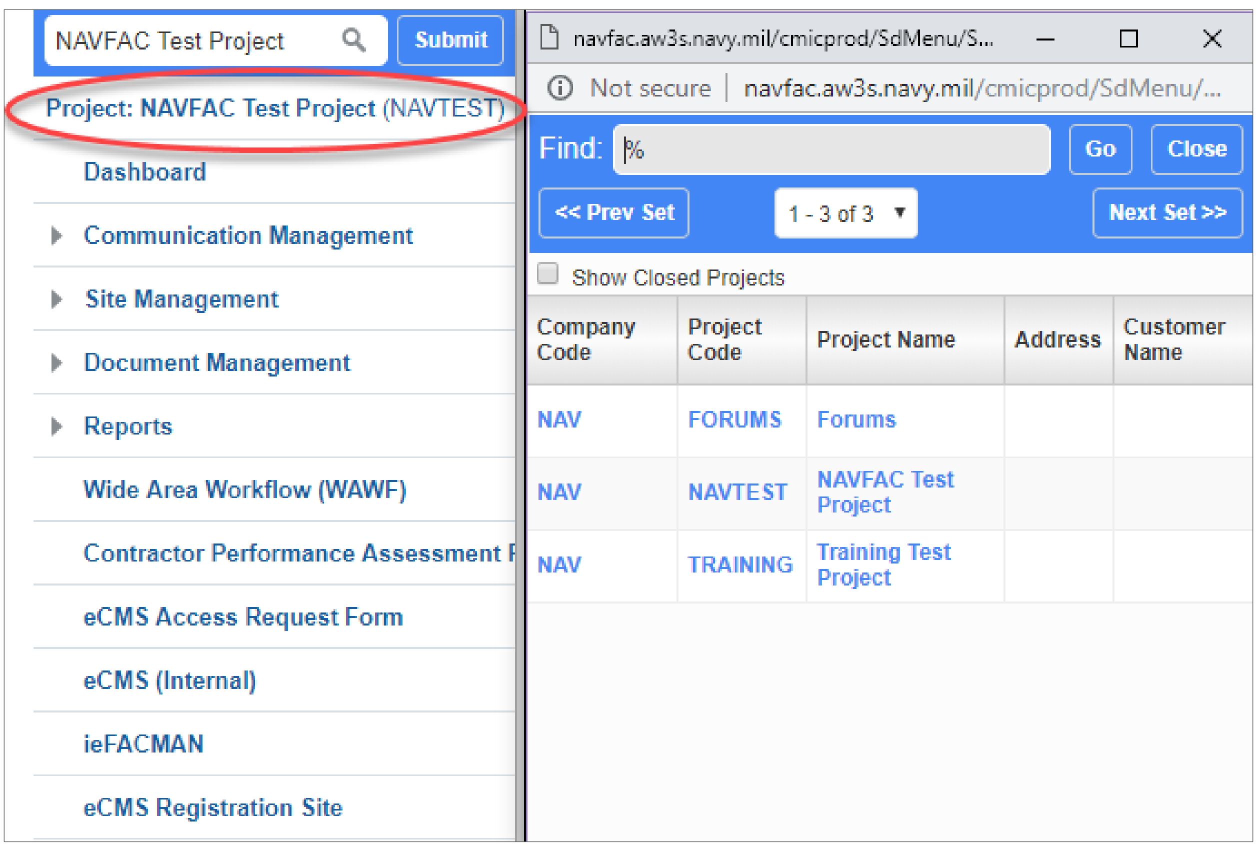
The **Navigation Pane or Treeview** is found on the far left of the screen. The folder structure may vary from project to project.



Click on the gray arrow next to each folder to see the pages for each grouping.

To change project views, click on the name of the project at the top of the menu. This will open a dropdown menu with the last 10 projects viewed by the user. Click the magnifying glass next to this list to open a popup of all projects the user is assigned to.

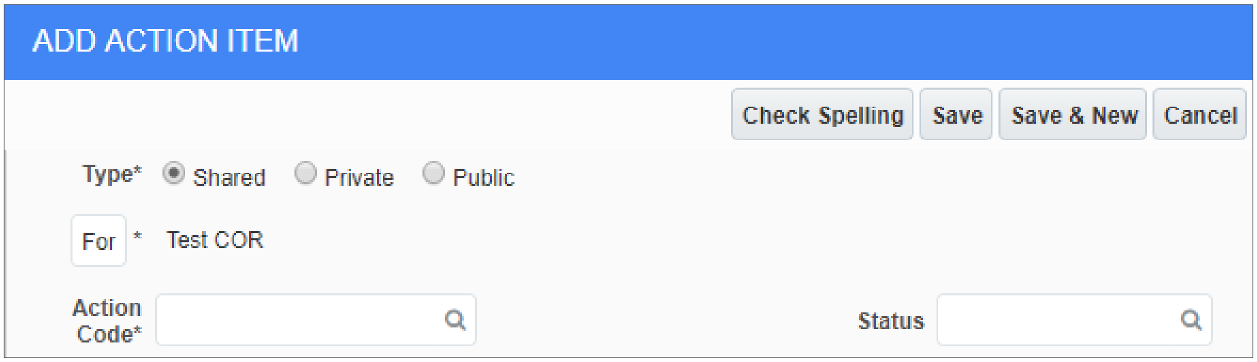
This will open a popup screen with a list of available projects to view.



1.3.2 Required Fields

In each form, there will be fields that are required and fields that offer added information. If the user leaves a required field blank, the user will not be able to submit the form.

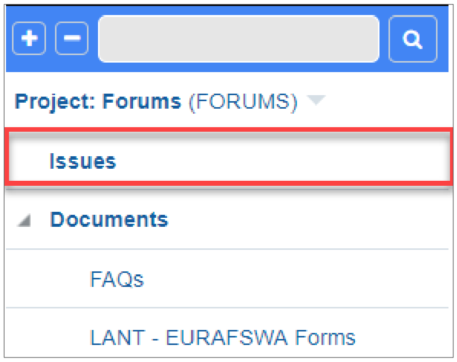
Users can find required fields by looking for the asterisk in the corner next to the label. In the example below, **Type., For,** and **Action Code** are required fields. **Status** is not required.



1.4. Technical Support and Feedback

If you have questions, concerns, or suggestions to provide, there are two ways to contact the eCMS User Support Team. The first is to navigate to the **Forums** project to submit an **Issue**.

Once logged in, select the current Project at the top of the file tree.

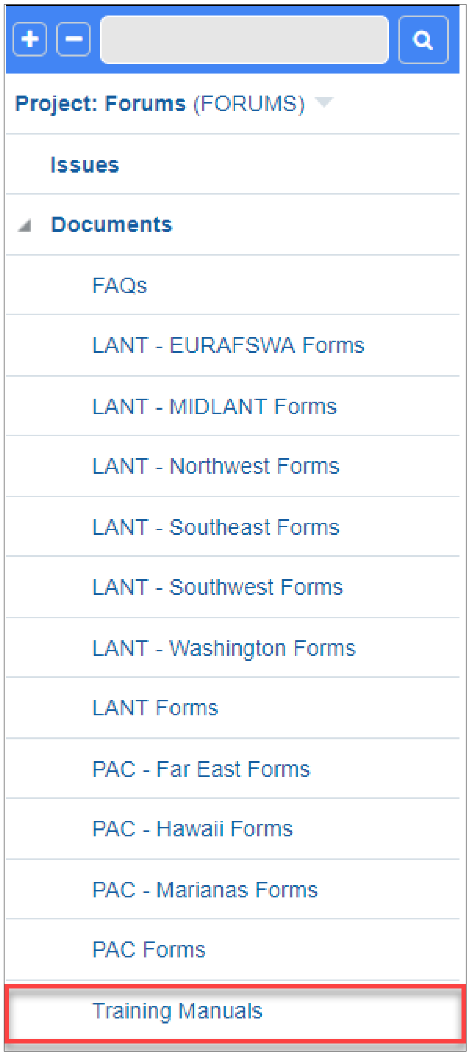


This will open a dropdown list of the last ten projects the user has viewed. To view all of the projects the user is assigned to, select the arrow next to the Search bar at the top of the Navigation Pane. Select **Forums**.

The second way to reach the Support team is to email ecmssupport@caci.com.

1.4.1 Download Training Manuals

After opening the **Forums** project, use the **Navigation Pane** to select **Documents**, and then **Training Manuals**.



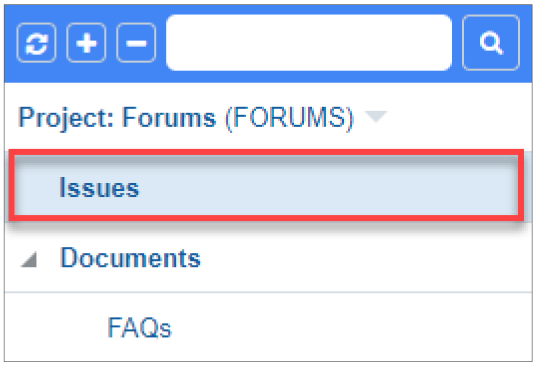
This will open a list of training documents available. Training documents available will include PowerPoint training lessons created to initiate new users, PDF Training Manuals for Contractors and NAVFAC employees, and an assortment of videos on specific lessons within the system. Select a file to view by clicking on the number next to it.

From the Navigation Pane, you can also select the **FAQs** for cheat sheets on how to resolve Frequently Asked Questions or select the **Forms** for your region to find frequently used forms.

1.4.2 Submit an Issue for Help or Feedback

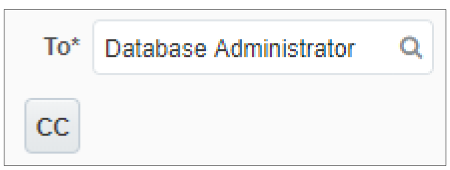
If you are having technical difficulty or would like to offer feedback on either the system or the training manuals, use the Issues application in the **Forums** project.

From the **Navigation Pane,** select **Issues.**



From the **Issues** screen, select **Add Issue** from the top, right of the screen.

The **Issue Detail** screen will open. The **From** section will already be completed. In the **To** section, select **Database Administrator**.



Type a **Subject**, such as "Feedback: Change to Training Manual." If your issue is time-sensitive, select a **Due Date** to set the deadline; otherwise leave it as is. Select the **Severity** level of the issue from the dropdown. Next, select the **Type** of issue, such as **Documentation Issue**, **Question**, or **Feedback**.

In the **Description** section, explain the issue to the team.

Issues will be reviewed in the order in which they are received. NAVFAC strives to respond to all Issues within two working days of receipt.

1.4.3 Connectivity Issues and Clearing the Cache

The system was upgraded on Dec 8th, 2018 and it is recommended that users clear their browser's history and cache to clear out the old system data from the browser. Over the period, the internet browser holds onto information which can cause issues with logging in and affects the page load time. Hence it is recommended that users clear the browser history, cache, and cookies on a regular basis.

Google Chrome

- Click on the Three-Dot menu at the upper right corner.

- Hover over "More Tools".
- Select "Clear browsing data"
- Click on the "Basic" Tab.
- Select all options (*Browsing History, Cookies and other site data,* and *Cached images and files*).
- Set the "Time range" to *All Time*.
- Click on "Clear data".

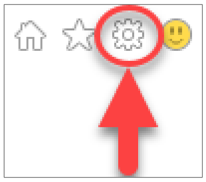
Firefox

- Click on the Hamburger menu at the upper right corner

- Click on "Options".
- On the left-hand side, select "Privacy & Security".
- Scroll to the History section and click "clear your recent history".
- Select all selection in History section.
- Set the "Time range to clear" to *Everything*.
- Click on "Clear Now".

Internet Explorer

- Click on the Tools menu at the upper right corner



- Select "Internet options".
- Under the Browsing History section, click the "Delete" button.
- Select all options.
- Click "Delete" and click "OK".

1.5. Frequently Asked Questions (FAQs)

How do I download the PDF attachment on my local drive?

- To download files from eCMS, please refer to ***Section 5.4.2 Downloading Attachments***.

Who should I contact if I have any questions about the system?

- Please e-mail eCMS Support at ecmssupport@caci.com.

How do I request access to the system?

- Only the GOV Contracting Officer's Representative (COR) or Construction Manager (CM) can request access to the system for everyone in the project. The Project Access Request Form can be found on the internal NAVFAC Portal.

Is there a knowledge library on commonly asked question or issues?

- Users can find commonly asked questions and find solutions to common issue in the Issues section of the Forums Project.

Where can I find training guides and documents?

- Users can find FAQs, User Guides, Cheat Sheets, and Live training video at following location of the Forums project.
    - *FAQs*: Forums – Documents – FAQs
    - *Training Documents*: Forums – Documents – Training Manuals

How do I change my password? How do I reset my password?

- Please refer to ***Section 1.2.3.1 Changing Password***.

What are the password requirements?

- Must be at least 14 characters in length.
- Must contain at least:
    - Two uppercase letters [A-Z]
    - Two lowercase letters [a-z]
    - Two digits [0-9]
    - Two special characters [e.g.: !@#$&*]
- A new password should differ from the changed password by at least 4 characters.
- A password cannot contain your network account name, username or display name.
- A password cannot be changed to any of the most recent 24 passwords.
- Must be changed no less frequently than every 60 days.
- Cannot be changed more frequently than once per day.

Can I share my login information with others?

- No. Users <u>must not</u> share their login information with anyone.

Can I use shared mailbox as my e-mail address?

- No. Because of the privacy and system accountability, shared mailbox cannot be used.

Can I use eCMS for Pre-Award project?

- At this time, users can only use the system for Post Award activities/tasks. Pre-Award functionality will be rolled up in the future releases.

Can I upload files containing PII (Personally identifiable information) to the system?

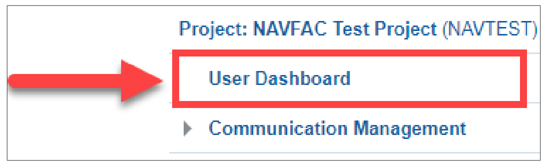
- No. Users <u>must not</u> upload any files that contain PII (Personally identifiable information).

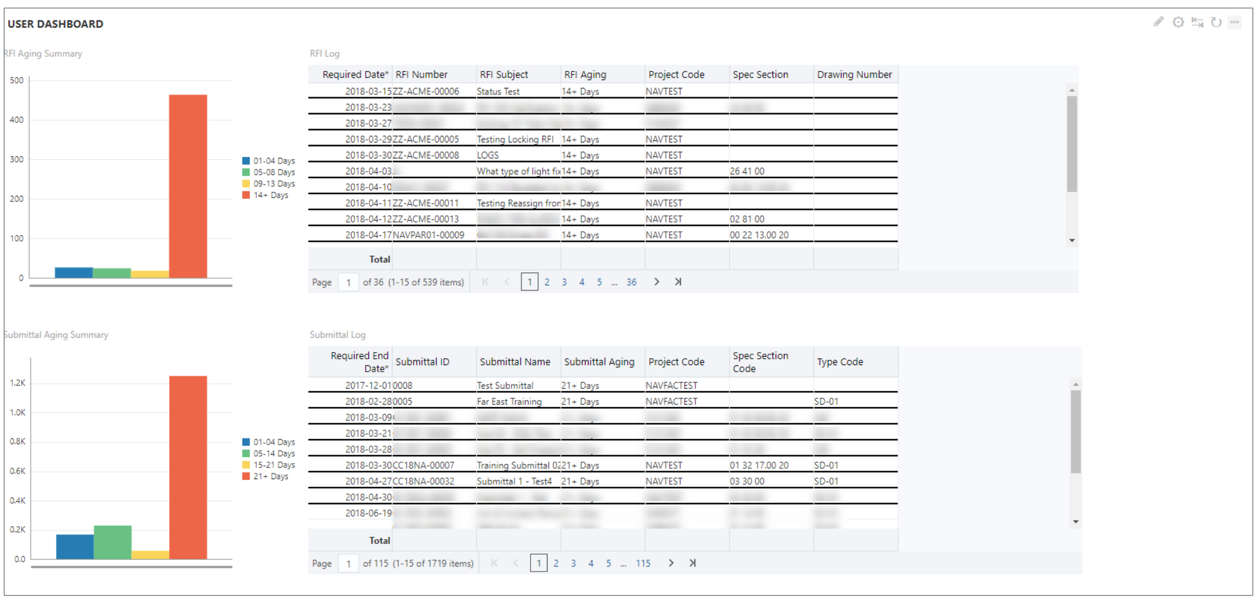
I recently received confirmation that I am part of an eCMS project. However, I cannot see the project. How can I access my project?

- To navigate to your eCMS projects, refer to ***Section 1.3.1 Navigation Pane***.

2. DASHBOARDS AND REPORTING

The User Dashboard, displayed below, is the default landing page and can be accessed by all users. This dashboard displays all outstanding RFIs and Submittals for the project you are viewing. If you navigate to another assigned project, the dashboard will update to reflect the outstanding RFIs and Submittals of the newly navigated project. If the User Dashboard does not load properly, please click *User Dashboard* on the treeview.





2.1. RFI and Submittal Bar Graphs

On the left side of the User Dashboard, you will find bar graphs for the outstanding RFIs and Submittals. ***Please note that the dashboard alternates the colors of the bars depending on how many are displayed.*** At this time, the bar(s) will display as follows:

1 bar	Blue
2 bars	Blue and Green
3 bars	Blue, Green and Yellow
4 bars	Blue, Green, Yellow and Orange

Therefore, it is important to pay attention to the legend/key on the right side of the graph to see the number of RFIs/Submittal each bar represents.

If you are having trouble seeing or clicking the bars, click the title of the graph.

RFI Aging Summary

Submittal Aging Summary

Once the title is highlighted, click the *Maximize* button on the right-hand side to enlarge the bar graph. When enlarged, click the *Restore/Minimize* button to go back to the dashboard.

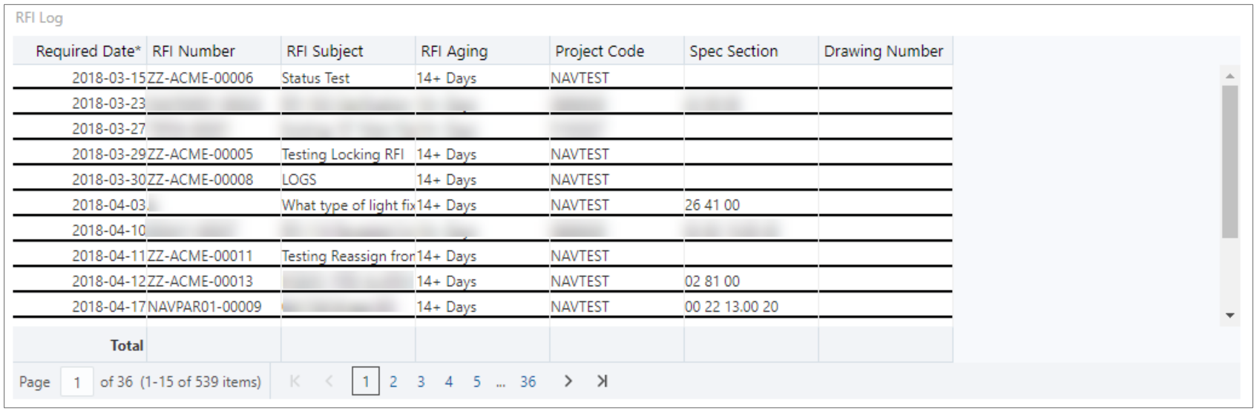
To Maximize:

To Restore/Minimize:

To see details about a specific metric, click its corresponding bar on the graph. Both the bar graph and log will update to show only the information for that bar. To navigate back to the dashboard, click the *Back* button on the upper-right hand corner of the graph as shown in the picture.

2.2. RFI and Submittal Logs

On the right side of the User Dashboard, the outstanding RFI and Submittal logs are individually displayed and are organized by the required due date. The black line sorts each item by the day. A short description of each column is listed below.



RFI Log

Required Date*	RFI Number	RFI Subject	RFI Aging	Project Code	Spec Section	Drawing Number
2018-03-15	ZZ-ACME-00006	Status Test	14+ Days	NAVTEST		
2018-03-23	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
2018-03-27	[illegible]	[illegible]	[illegible]	[illegible]		
2018-03-29	ZZ-ACME-00005	Testing Locking RFI	14+ Days	NAVTEST		
2018-03-30	ZZ-ACME-00008	LOGS	14+ Days	NAVTEST		
2018-04-03	[illegible]	What type of light fix	14+ Days	NAVTEST	26 41 00	
2018-04-10	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
2018-04-11	ZZ-ACME-00011	Testing Reassign fron	14+ Days	NAVTEST		
2018-04-12	ZZ-ACME-00013	[illegible]	14+ Days	NAVTEST	02 81 00	
2018-04-17	NAVPAR01-00009	[illegible]	14+ Days	NAVTEST	00 22 13.00 20	
Total						

Page 1 of 36 (1-15 of 539 items) 1 2 3 4 5 ... 36

RFI Log Columns

- **Required Date**: The date of when the RFI is due — Required Date*
- **RFI Number**: The ID or number of the RFI — RFI Number
- **RFI Subject**: The title or subject of the RFI — RFI Subject

- **RFI Aging**: The number of days since the RFI was created

  RFI Aging

- **Project Code**: The ACQR# of the project

  Project Code

- **Spec Section**: Displays the code of the Spec Section

  Spec Section

- **Drawing Number**: Displays the Drawing Number of the RFI

  Drawing Number

Submittal Log

Required End Date*	Submittal ID	Submittal Name	Submittal Aging	Project Code	Spec Section Code	Type Code
2017-12-01	0008	Test Submittal	21+ Days	NAVFACTEST		
2018-02-28	0005	Far East Training	21+ Days	NAVFACTEST		SD-01
2018-03-09	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
2018-03-21	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
2018-03-28	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
2018-03-30	CC18NA-00007	Training Submittal 02	21+ Days	NAVTEST	01 32 17.00 20	SD-01
2018-04-27	CC18NA-00032	Submittal 1 - Test4	21+ Days	NAVTEST	03 30 00	SD-01
2018-04-30	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
2018-06-19	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total						

Page 1 of 115 (1-15 of 1719 items) 1 2 3 4 5 ... 115

Submittal Log Columns

- **Required End Date**: The date of when the Submittal is due

  Required End Date*

- **Submittal ID**: The ID or number of the Submittal

  Submittal ID

- **Submittal Name**: The title or name of the Submittal

  Submittal Name

- **Submittal Aging**: The number of days since the Submittal was created

  Submittal Aging

- **Project Code**: The ACQR# of the project

  Project Code

- **Spec Section Code**: Displays the code of the Spec Section

  Spec Section Code

- **Type Code**: Displays the Submittal Type

  Type Code

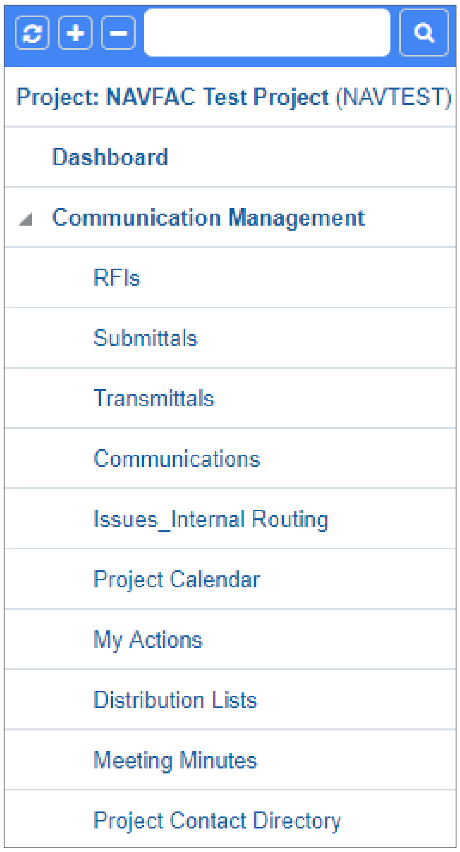
** Currently, the User Dashboard will display all outstanding RFIs and Submittals for the current project. In a future version, users will have the option to see their RFIs and Submittals by user.*

3. COMMUNICATION MANAGEMENT

3.1. Background

The **Communication Management** section of eCMS lays the foundation for project management.

Folder structures may vary by projects and permissions, but **Communication Management** will always be included. The Communication Management section will allow for management of RFIs and Submittals, checking deadlines and responsibilities, and accessing team members.



This section will cover:

- Process for Sending RFIs and Submittals
- How to add attachments to a record
- How to link related objects and internal routing to an RFI or Submittal
- How to check the RFI or Submittal history
- How to sort data
- How to track action items and milestones
- Accessing the team member directory.

3.2. RFIs and Submittals

3.2.1 Purpose

The **Requests for Information** (RFIs) and **Submittal** applications allows KTRs working on construction and facilities management projects to ask questions to NAVFAC. An e-mail notification will alert you when NAVFAC responds. View all new responses and other communications upon login.

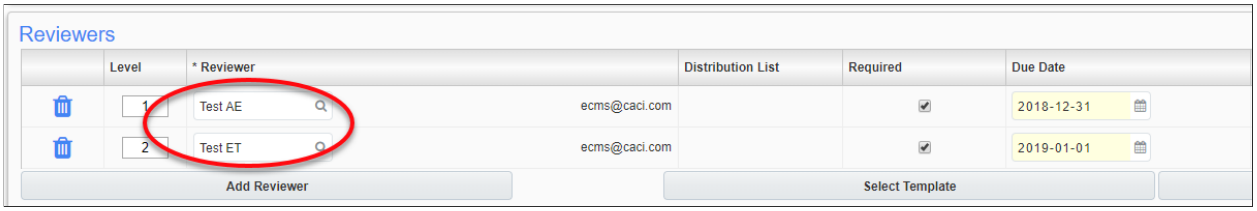
KTRs can send two types of official requests to NAVFAC: RFIs and Submittals.

- **RFIs** are a vehicle for the contractor to obtain added or clarifying information when the contract documents are unclear, incomplete, or contradictory.
- **Submittals** are drawings and information sent to the NAVFAC team for review.

Recently, new updates to eCMS were made to improve the efficiency and intuitiveness of processing RFIs and Submittals.

If you have used the system previously, you will notice that the detail screen for RFIs and Submittals are displayed differently. The screen is organized to display like a form and is arranged in sections for a more logical response. The basic information required has not changed. To improve and streamline collaboration, new functionality provides the ability to add **Reviewers**, facilitate **Reviewer Response** and use **Notes** to communicate efficiently.

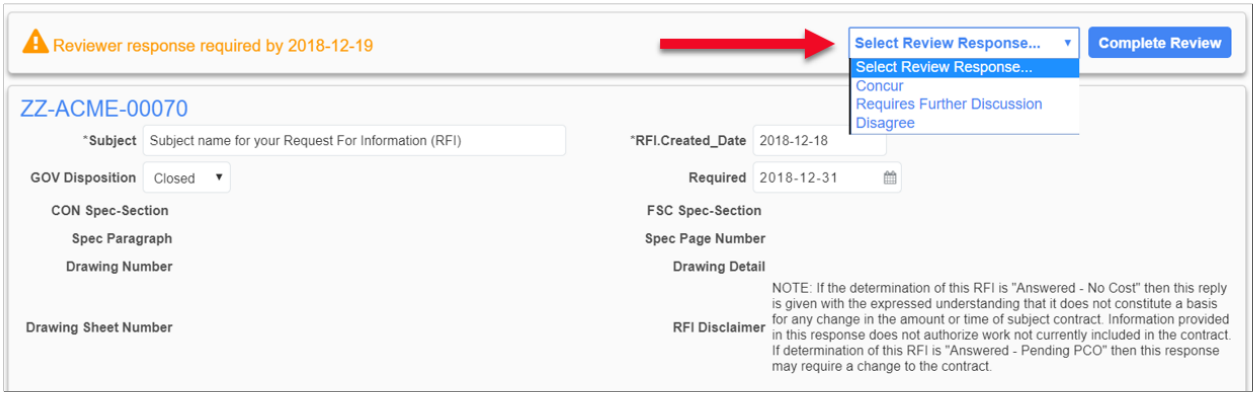
A new **Reviewer** Section appears in both the RFI and Submittal Detail screens. In the system, subject matter experts (SMEs) are referred to as Reviewers. This section can only be completed by NAVFAC users; however, contractors are able to see who was added as a reviewer.



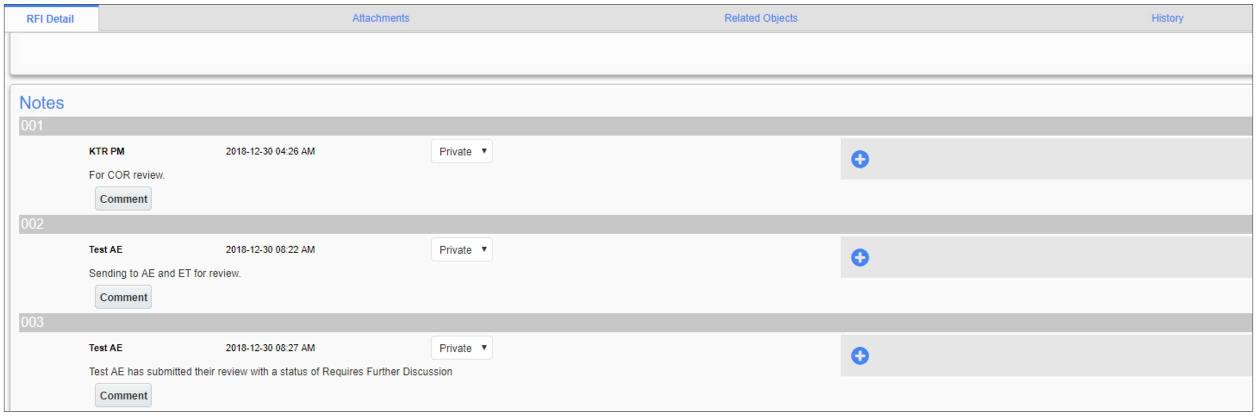
- RFIs – For RFIs, this means the Forwarding function is no longer required. Instead, the COR/CM navigates to the **Reviewers** Section to add project SMEs for feedback. Reviewers can be added individually or a distribution list can be used.
- Submittals – Issues/Internal Routing are no longer required for the COR/CM/PAR to send a submittal to reviewers. Like RFIs, reviewers are added in the **Reviewers** Section.

Reviewer Response – This is a new feature for both RFIs and Submittals and simplifies the way reviewers respond to the COR/CM/PAR. Once the RFI/Submittal is sent to a reviewer, a **Reviewer Response** box appears at the top of the RFI and Submittal informing the reviewer of the response due date and a drop-down box of responses. The Reviewer selects a response, adds any additional notes and completes the review.

This action sends the RFI/Submittal to the COR/CM/PAR for final disposition.



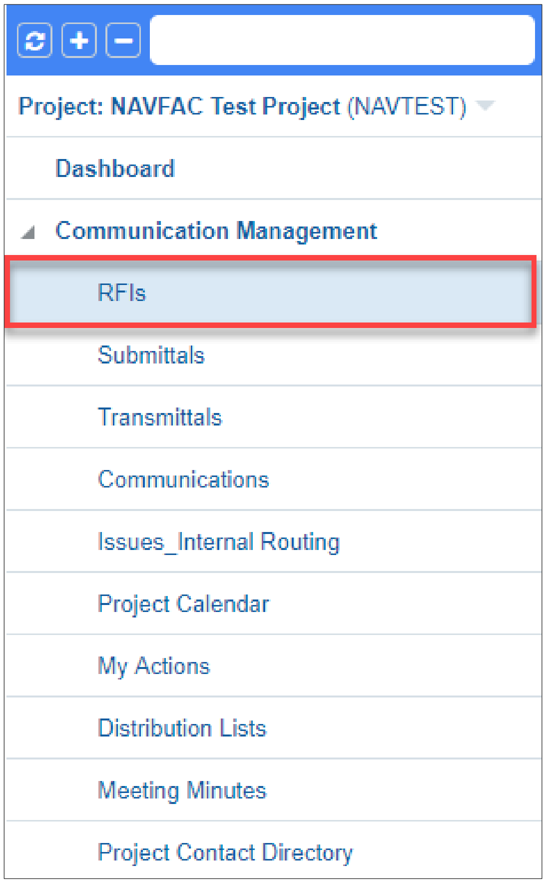
A new **Notes** Section also appears in both the RFI and Submittal Detail screens. Notes can be submitted by all users, contractors and NAVFAC alike. All notes default to private, so they can only be seen initially by NAVFAC users. However, the COR/CM/PAR can decide which notes should be seen by the contractor by making them public.



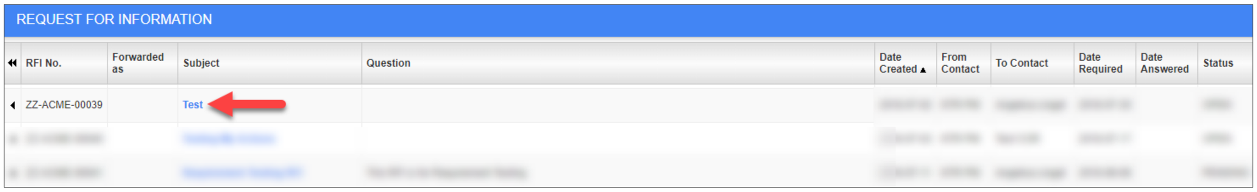
The software vendor continues to work on enhancements to further improve ease of use of the system. The user community will be notified of these changes as they occur. As you navigate through the system as a new user, you can request assistance through ecmssupport@caci.com or post an issue in the Forums Project (directions are provided in ***Section 1.4 - Technical Support and Feedback***).

3.2.2 RFI Process

Using the navigation pane on the left side of your screen, click on **Communication Management** and then **RFIs**.



This opens the RFI Log. You can open an RFI to view by clicking on the title under the **Subject** column.



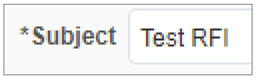
To create a new RFI, click the **Add RFI** button at the top right of your screen.

A new screen will open with the RFI Detail form. Complete all required fields. See list below for explanations of the fields.

ZZ-ACME-00076

*Subject	Test RFI	*RFI.Created_Date	2018-12-27
GOV Disposition	PENDING	Required	2019-01-24
CON Spec-Section	LIST OF DRAWINGS	FSC Spec-Section	
Spec Paragraph	Spec Paragrah	Spec Page Number	1
Drawing Number	5	Drawing Detail	Drawing Detail
Drawing Sheet Number	3	RFI Disclaimer	NOTE: If the determination of th

- **<u>Subject</u>**: Enter a **Subject**. Keep it short and easy for NAVFAC to read while skimming through subjects. The opportunity to elaborate on any details is available further in the form.



- **<u>RFI Number</u>**: This field shows the number automatically assigned to the RFI.

- **<u>RFI Created Date</u>**: The date the RFI was created.

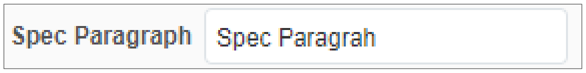
- **<u>Required</u>**: The **Required** field indicates when the RFI should be answered by. This field will be auto populated at nine working days out. However, it can be changed to allow more time for NAVFAC to respond.

- **<u>GOV Disposition</u>**: This is the NAVFAC RFI status. Before an RFI is sent, it shows as PENDING.

- **<u>CON Spec-Section</u>**: This is the Spec-Section field for Construction. The Spec Section Codes are based on CSI Codes in the UFGS Manual and are updated quarterly.

- **<u>FSC Spec-Section</u>**: This is the Spec-Section field for Facilities. The Spec Section Codes are based on CSI Codes in the UFGS Manual and are updated quarterly.

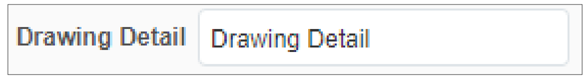
- **<u>Spec Paragraph</u>**: The paragraph of the Spec



- **<u>Spec Page Number</u>**: The page number that the Spec is located

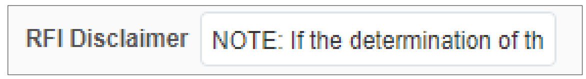
- **Drawing Number**: Enter the associated drawing number for reference.

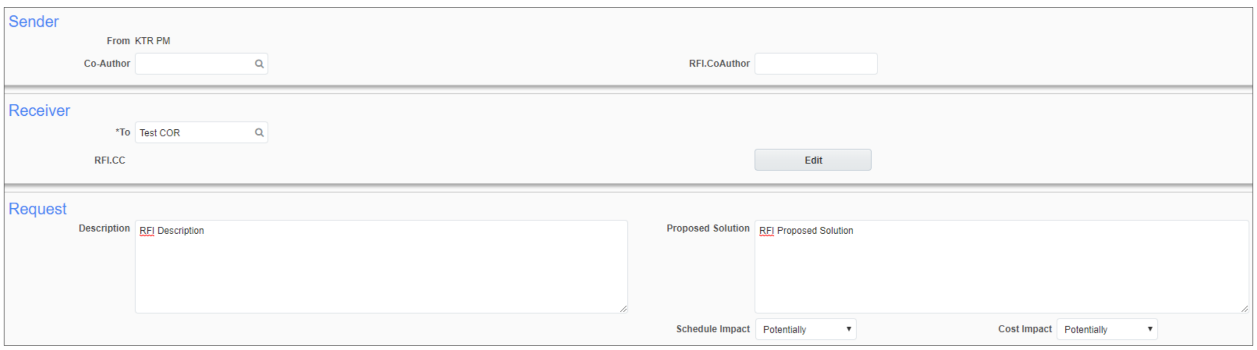
- **Drawing Detail**: Details of the drawing

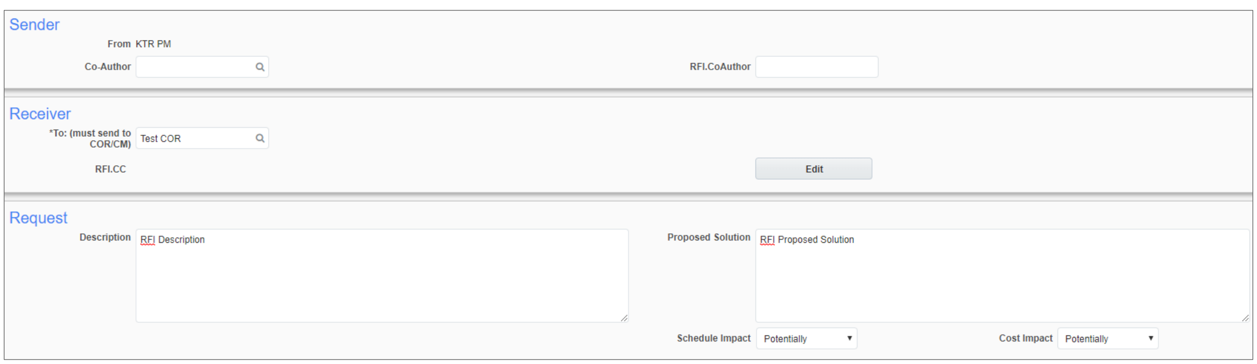


- **Drawing Sheet Number**: Indicates the sheet number that the drawing is in

- **RFI Disclaimer**: This field is auto populated and will display the **RFI Disclaimer**.

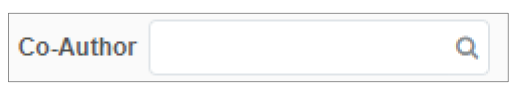


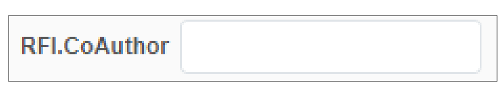




- **From**: Sender's name appears in the **From** field.

- **Co-Author**: **Co-Authors** can be added to an RFI.





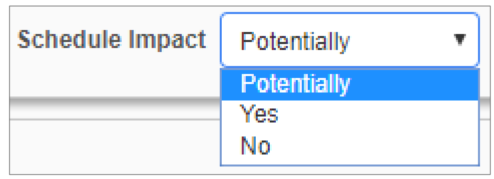
- **To: (must send to COR/CM)**: Use the dropdown menu to select the COR/CM who will receive the RFI.

- **CC**: Copy team members to grant them access to the communication trail and all information sent to NAVFAC.

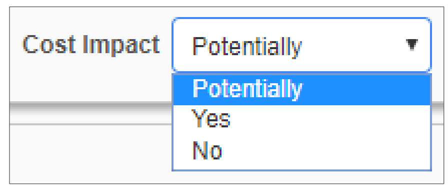
- **Description**: Briefly describe the proposal and the section of the proposal the RFI will affect. Include the original requirements.

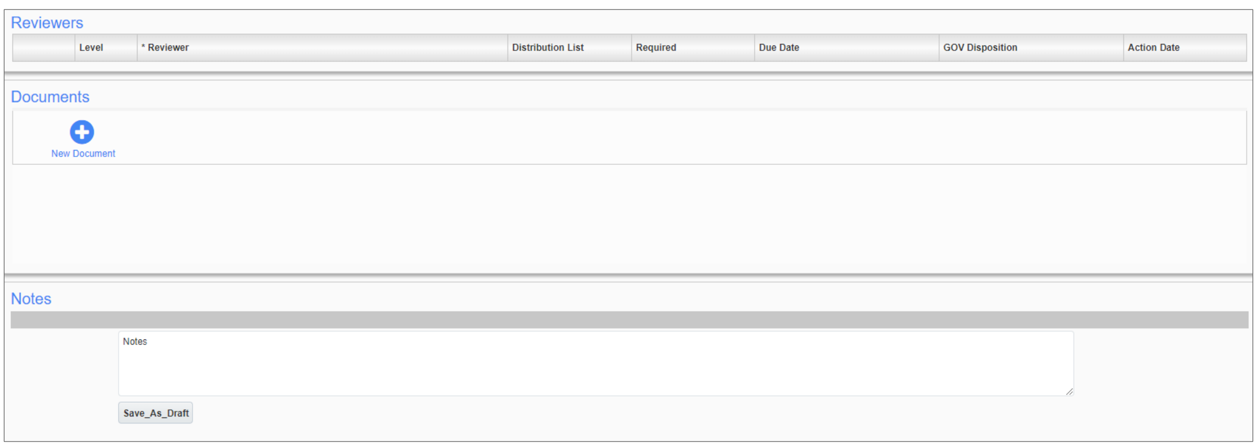
- **Proposed Solution**: Describe all changes or ask a question for clarification

- **Schedule Impact**: The **Schedule Impact** is defaulted to Potentially. If the proposed solution could affect the schedule, select Potentially or Yes, otherwise, select No.

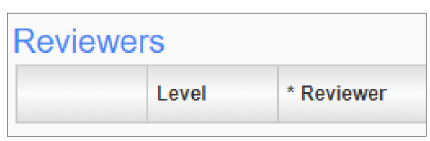


- **Cost Impact**: Some RFIs need more funding and others will have no impact on the budget. **Cost Impact** is defaulted to Potentially. Select the button for Potentially if the proposed solution might affect the budget or Yes if it will. Otherwise, select No.

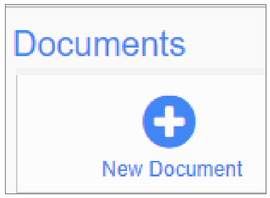




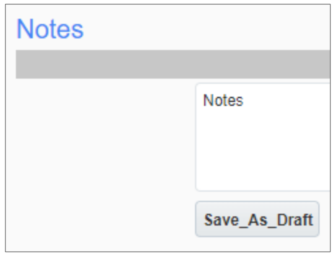
- **Reviewers**: This section will display the users reviewing the RFI. It will initially be blank, but **Reviewers** will be added by the Government lead.



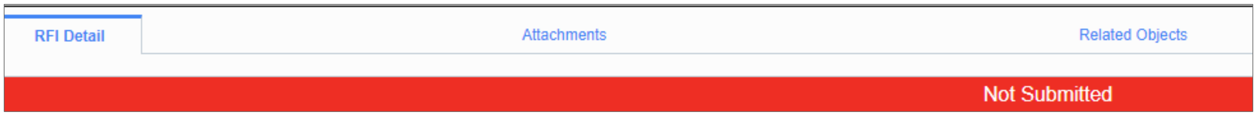
- **Documents**: Attachments will be in this section. This is one way to add an attachment. To do this, click the “New Document” button.



- **Notes**: Additional information can be added here.



After completing the RFI form, save the RFI to add attachments or link related objects or submit if completed. If you save without submitting, a red bar appears at the top of the screen that reads “Not Submitted.”

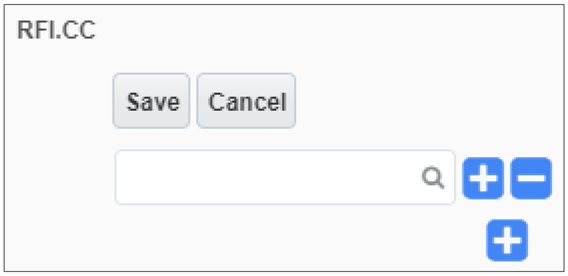


From here, you may also add a note or edit information using the buttons at the top, right of the screen.

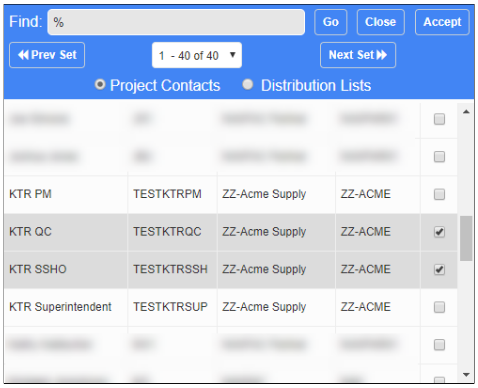
Return to the **RFI Detail** tab once everything has been added to the RFI and submit. Once submitted, the RFI will be sent to the Government lead for review, and you will receive notification once the RFI has received a response. Upon logging into eCMS, a bold number next to the RFI folder indicates a response has been received.

Please note that KTRs are not able to view all RFIs unless they are listed as the From, To, or CC contact. To allow the users access to an RFI, it is recommended to add the users as a CC. To do this, navigate to a submitted RFI. **Add CC** should be displayed at the top right.

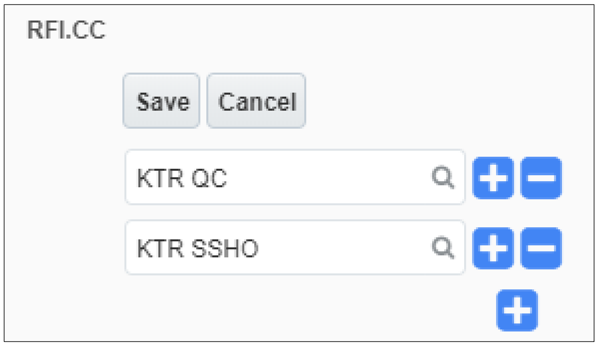
Click **Add CC**. Scroll to the RFI CC section and select the magnifying glass.



A popup window will display with the users in the project. Checkmark the users that you want CC'd onto the RFI. Then, click **Accept**.



The selected users will now display. Click **Save** to save your changes.



3.2.3 Attachments, Related Objects, and History

When viewing an individual RFI from the navigation pane, four tabs appear across the top of the screen.

- The first tab, **RFI Detail**, has the bulk of information about the RFI.

- The **Attachments** tab will have attachments sent with this RFI. This is another screen that can be used to add attachments.

- The **Related Objects** tab will track communication, issues, and relevant documentation with stakeholders throughout the project.

- The **History** tab will allow the viewing of updates and decisions made on the RFI.

3.2.3.1 Attachments

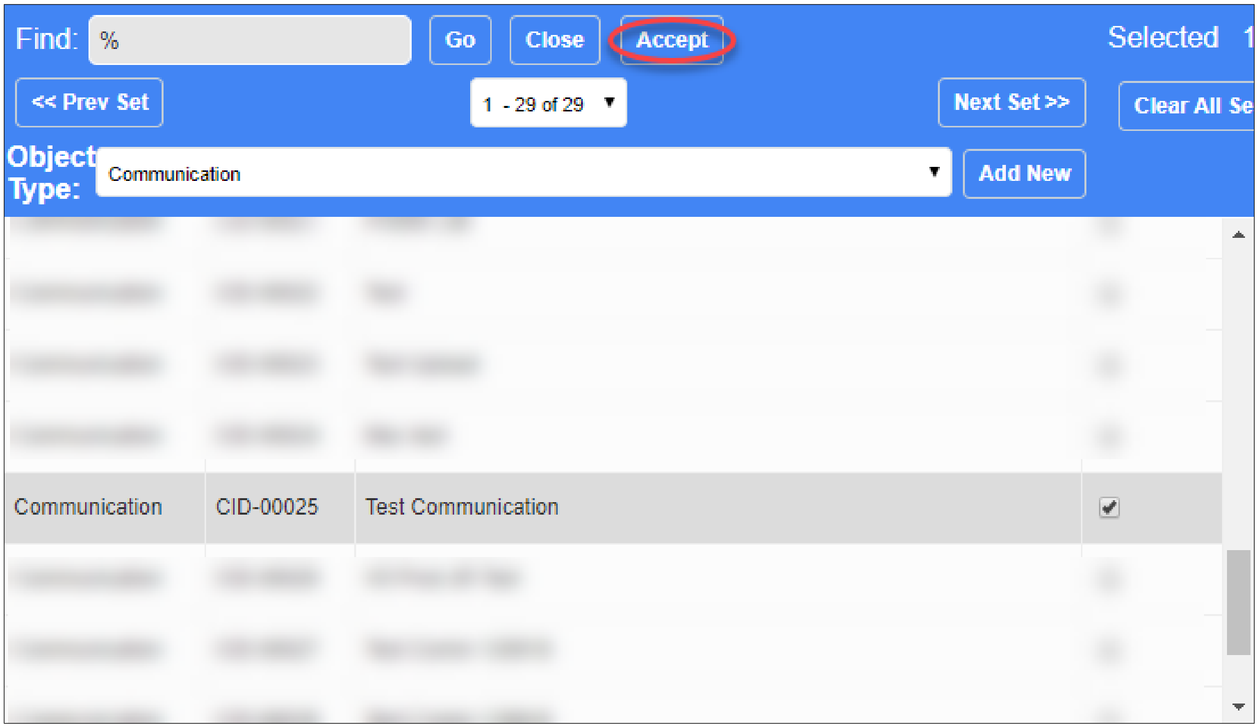
To upload or download attachments, refer to ***Section 5.4.1 Uploading Attachments*** and ***Section 5.4.2 Downloading Attachments***.

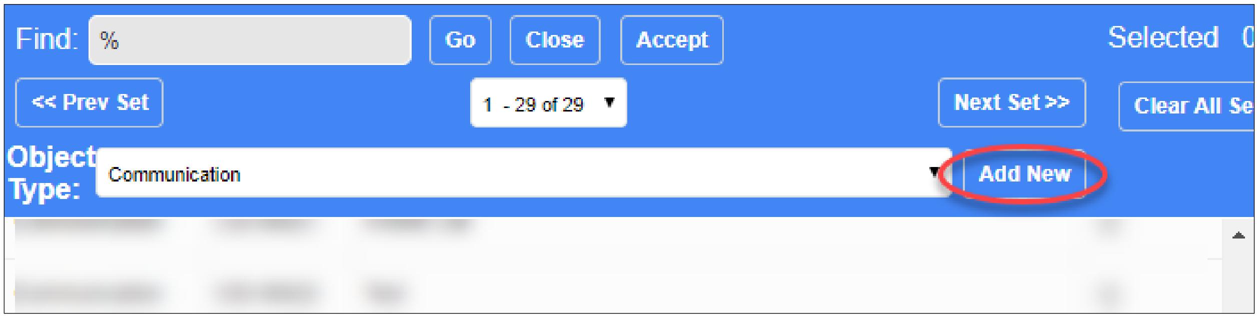
3.2.3.2 Adding Related Objects

The **Related Object** tab allows different components, such as Communications, Daily Reports, Internal Routing, Documents, and Notices to be added to an RFI.

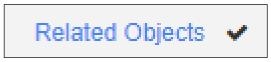
Click on the **Related Objects** tab and select the **Assign Object** button at the right corner of the screen.

Click the dropdown menu in the **Object Type** field and select the type of object to add. You may now link to an existing object by checking the object and clicking **Accept**. You can also create a new object by selecting the **Add New** button. Both situations are shown below.



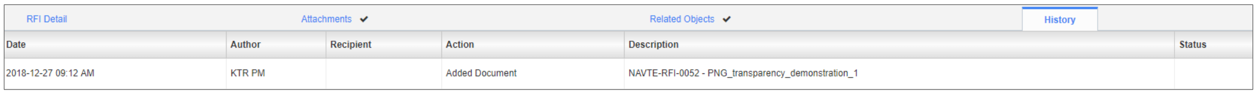


There will now be a checkmark next to the **Related Objects** tab indicating that there is a related object.



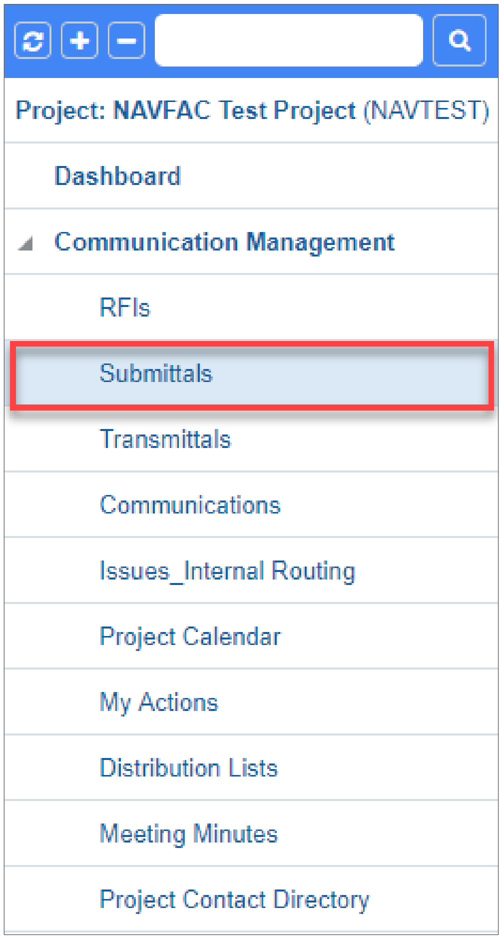
3.2.3.3 Reviewing the RFI History

The **History** tab displays all decisions, edits, and notes made to an RFI.



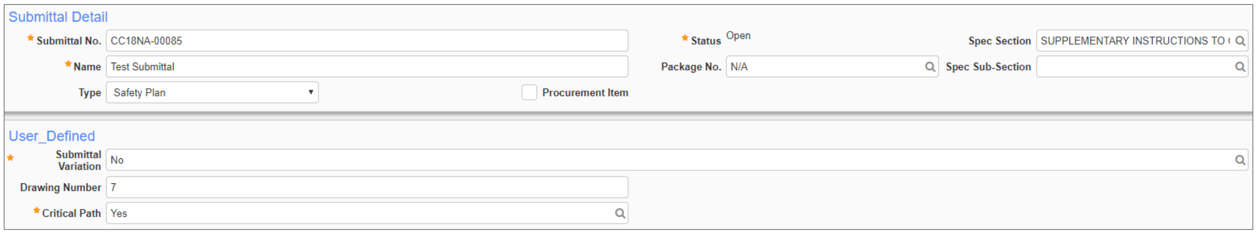
3.2.4 Submittals

The **Submittal** process works very similar to the RFI process. To access **Submittals**, go to the Navigation Pane, open Communication Management, and then select **Submittals**. From here, you can see all Submittals created on this project.

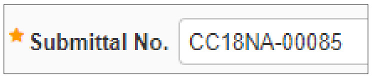


To create a new **Submittal,** select **Add Submittal** in the top, right corner of the screen.

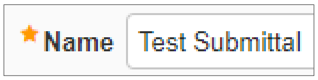
A new screen will open with the Submittal Detail form. Complete all required fields. See list below for explanations of the fields.



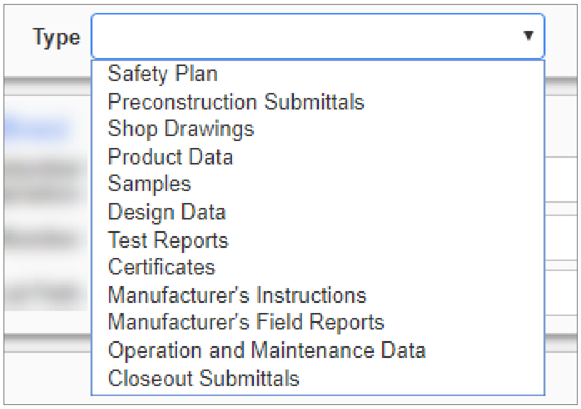
- **Submittal No.**: This field shows the number automatically assigned to the Submittal.



- **Name**: Create a name for the Submittal.

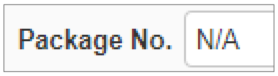


- **Type**: Select the **Type** of Submittal from the dropdown list.

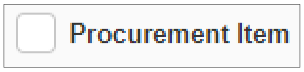


- **Status**: The **Status** will have defaulted to Open.

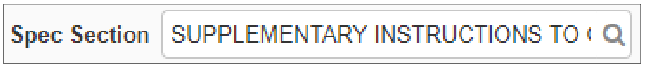
- **Package No.**: This feature interacts with Submittal Packages.



- **Procurement Item**: Check this box to indicate a procurement item.

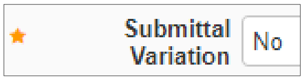


- **Spec Section**: This is a Spec-Section field for Construction and Facilities. Choose the Spec-Section related to the Submittal, if relevant.

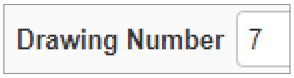


- **Spec Sub-Section**: If the Spec-Section could not be found in the Spec Section list, it can be inserted in this field.

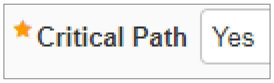
- **Submittal Variation**: Select yes or no if there is a Submittal Variation.

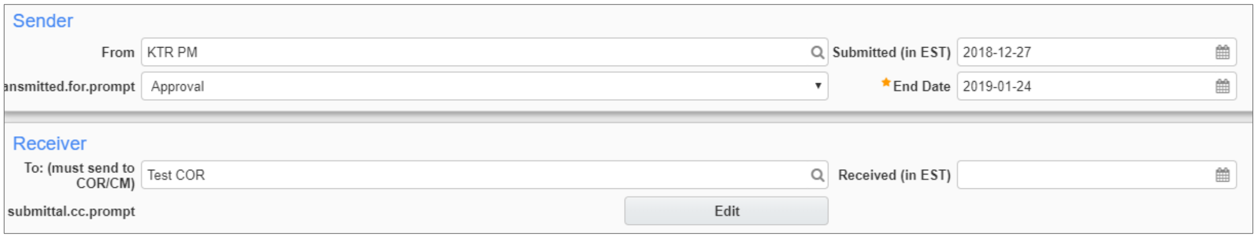


- **Drawing Number**: Enter the associated drawing number for reference.



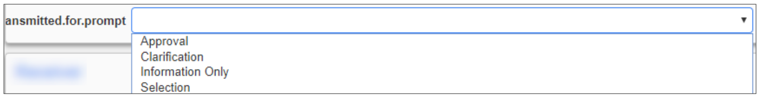
- **Critical Path**: Indicate if the Submittal varies from the critical path of the schedule.





- **From**: This field is initially blank. The sender's name must be set here.

- **Transmitted for Prompt**: Select the purpose of the Submittal



- **Submitted**: Set the date of when the Submittal is submitted.

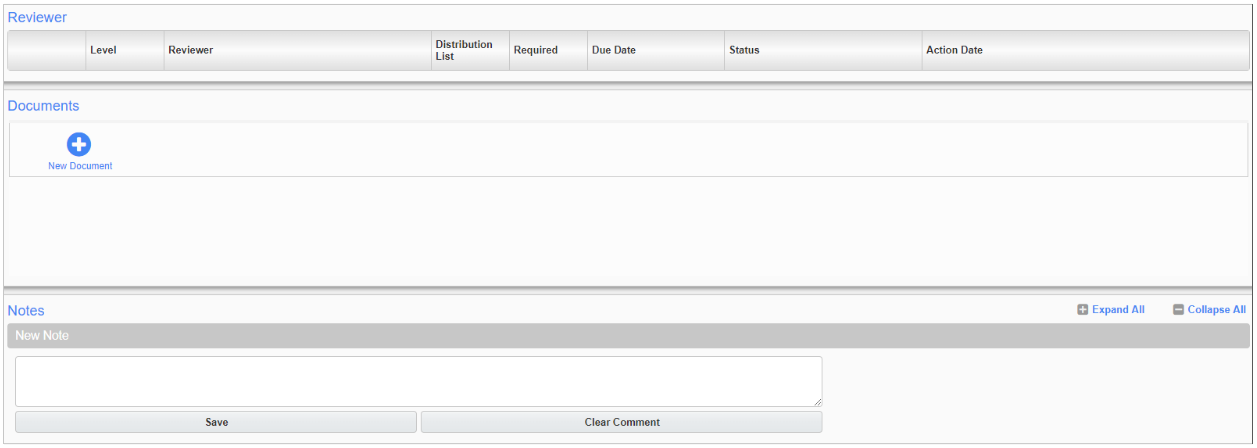
- **End Date**: The date of when the Government lead will need to respond to the Submittal.

- **To: (must send to COR/CM)**: Use the dropdown menu to select the COR/CM who will receive the Submittal.

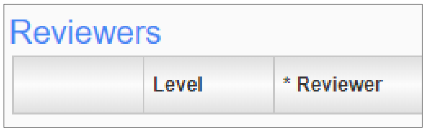
- **CC**: Copy team members to grant them access to the

communication trail and all information sent to NAVFAC.

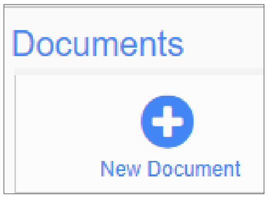
- **Received**: The date of when the receiver receives and views the Submittal.



- **Reviewer**: This section will display the users reviewing the Submittal. It will initially be blank, but Reviewers will be added by the Government lead.



- **Documents**: Attachments will be in this section. To add an attachment, click the “New Document” button.



- **Notes**: Additional information can be added here.

When all fields in the Submittal form are completed, select **Submit** in the upper-right corner of the screen. The Submittal will be sent to the Government lead. Once the Submittal has been answered, the response will be noted by the Submittal status.

If needed, at the top of the Submittal form are several tabs similar to the RFI form where you can add Related Objects or Attachments. It is recommended to add a Related Object and

Attachment after the Submittal has been completed. Adding either will result into submitting the Submittal.

3.2.5 Sorting Data

eCMS offers three ways to filter and sort information to find specific cases to review.

- Execute a query **(Simplest; Recommended)**
- Send information to a downloadable Excel spreadsheet and sort the information from there, or
- Use the Filtering function in eCMS **(Most Complicated)**

3.2.5.1 Enter and Execute a Query

Select **Enter Query** from the top, right of the screen.

Blue bars will display at the top of the spreadsheet; enter the search terms for the field to be filtered. For instance, to filter all Submittals with the word Light in the title, enter Light% under the **Name** field.

SUBMITTALS

	Submittal No.	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner
		LIGHT%					
	0002	Subject	Test Company	Government Cor			

Select **Execute Query** in the top, right, and the system will show a list of all Submittals.

To query multiple fields, enter the information in each field and click **Execute Query**. Use % to sort for a portion of text. For example, let’s say we want to search for all RFIs that have the word “maximum” in the subject line. Someone may have shortened it to “Max” when entering this field. To find everything with the word “Maximum” in the subject, we would enter %Max% in the query field under Subject. This will pull all RFIs with the word “Max” in it, even if they have words or letters in front or after that term. This field is not case sensitive.

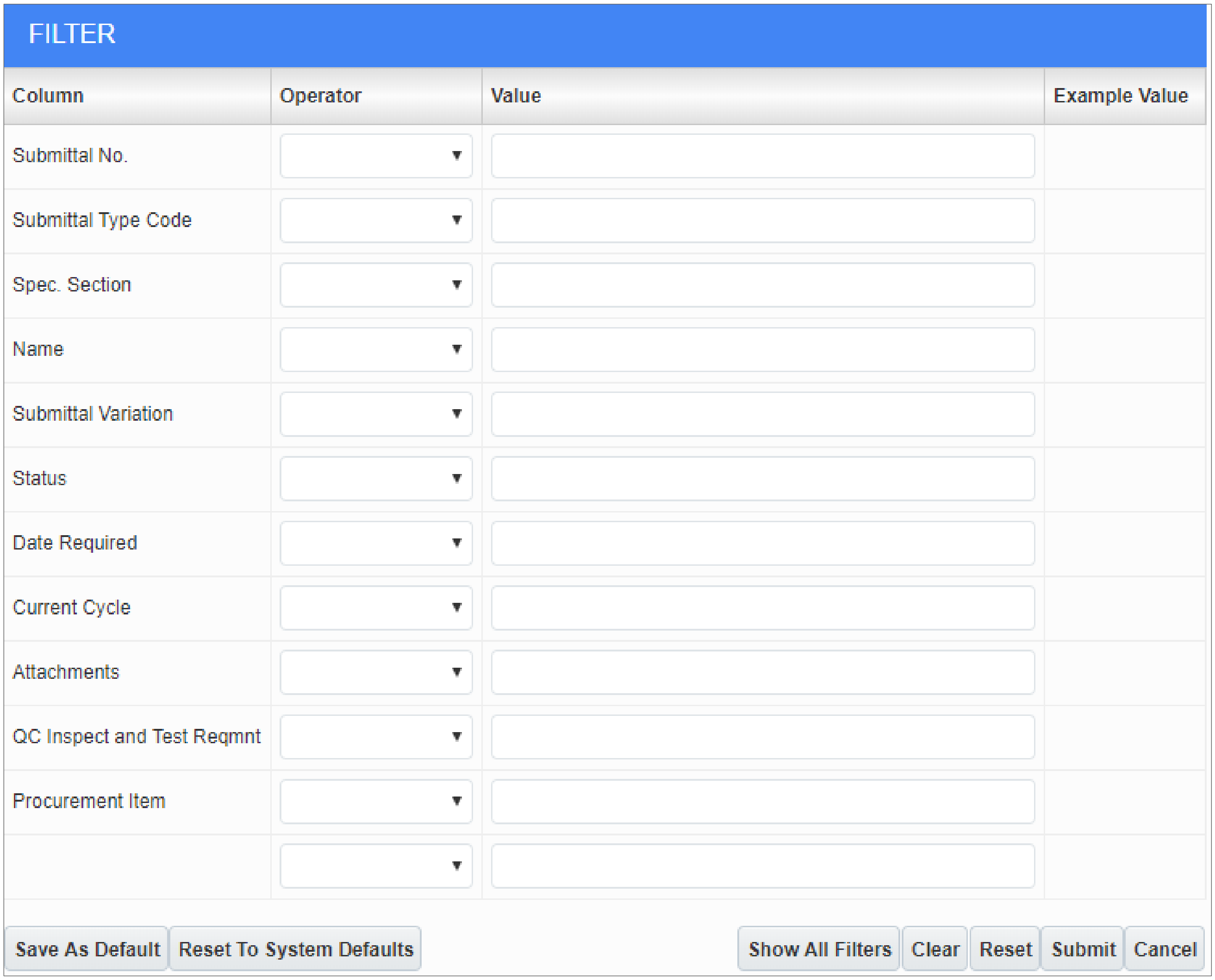
3.2.5.2 Send to Spreadsheet

Send all RFIs or Submittals to an Excel spreadsheet, or send a filtered list to an Excel spreadsheet by clicking on the **Send to Spreadsheet** button in the top, right corner of the screen.

This will automatically download a spreadsheet with all the user's RFI information included. From there, use the functions of Microsoft Excel to sort the fields and find specific information. If a filter is turned on, only the filtered list will download to Excel.

3.2.5.3 Filtering

Select the **RFIs** or **Submittals** button in the navigation bar on the left side of the screen to pull up a list of all RFIs or Submittals. To find specific RFIs or Submittals, sort the list by selecting the **Show Filter** button at the top, right of the screen.

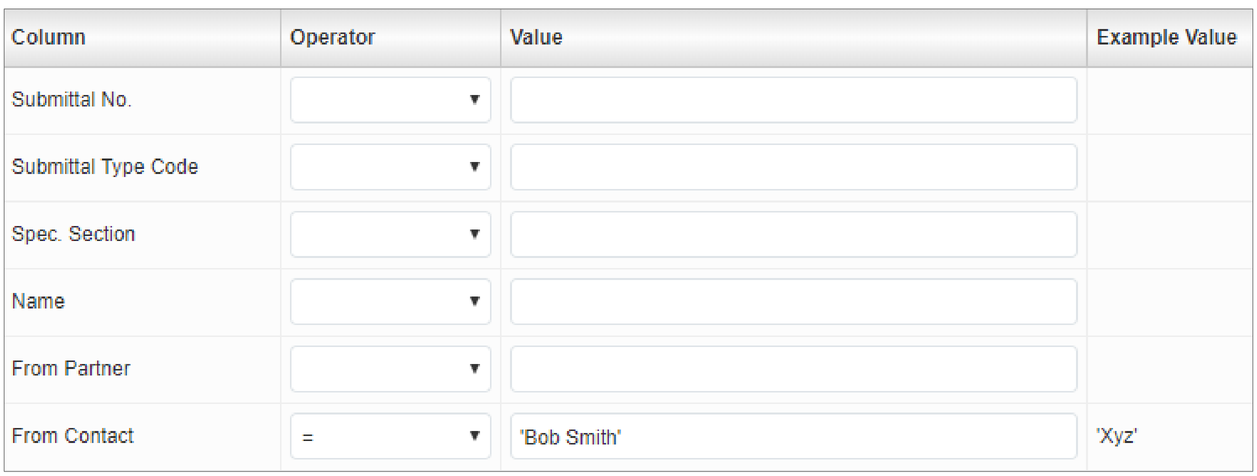


This will pull up a list of fields used for filtering searches. Using the two columns available, enter the **Operator** code and **Value** to sort data.

Operator: Select the dropdown arrow next to the field you want to sort. A list of symbols appears. These will set the parameters of the filter:

Operator Symbol	Meaning
=	Equals
!=	Not Equal
>	Greater Than
>=	Greater Than or Equal To
<	Less Than
<=	Less Than or Equal To
IN	Equal to Any Value in Test
NOT IN	Not Equal to Any Value in Test
LIKE	Value A matches pattern in Value B
NOT LIKE	Value A does not match pattern in Value B
BETWEEN	Value Range between X and Y
NOT BETWEEN	Value Range not between X and Y
IS NULL	Find Blank or Incorrect Values
IS NOT NULL	Find Values that are Complete

After selecting a symbol in the **Operator** column, enter the values to filter in the **Value** column. To ensure correct filtering, enter the values to match the **Example Value** format that appears in the far-right column.



Column	Operator	Value	Example Value
Submittal No.			
Submittal Type Code			
Spec. Section			
Name			
From Partner			
From Contact	=	'Bob Smith'	'Xyz'

Enter dates in DD-MON-YY format and use a % as a wildcard for searches. This field is somewhat technical. An easier way to sort data is to download to Excel or use the **Enter Query** functions described in the sections above. Filtering can be used to set up a permanent view of folders for those that know what they want to see each day.

3.3. Communications and Issues/Internal Routing

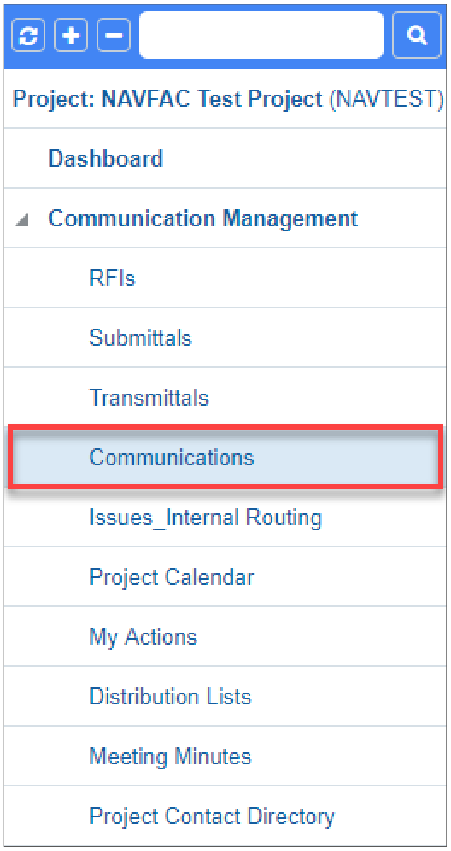
3.3.1 Purpose

Communications and **Issues_Internal Routing** (also referred to as Issues), can be used to convey information or assign a task to a team member or stakeholder. Using these applications will allow information, reminders, and task deadlines to show up on the recipient's **Project Calendar** and **My Actions** list.

3.3.2 Adding a New Communication

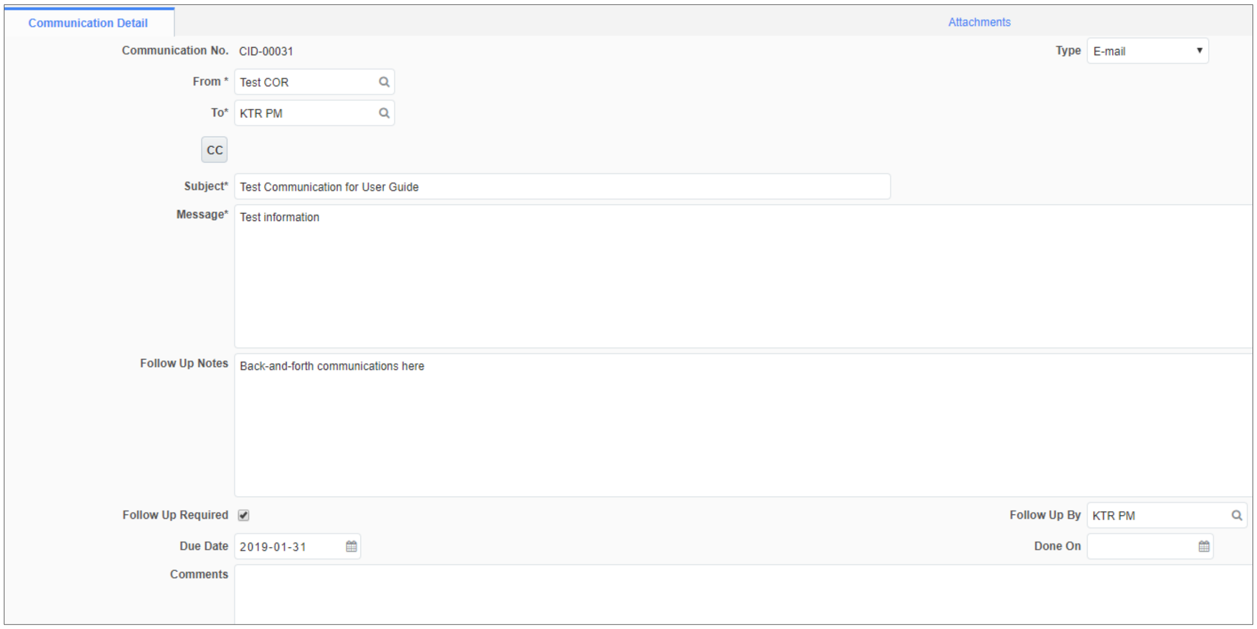
The **Communications** application in eCMS functions similar to e-mail. Use **Communications** for routine correspondence, back-and-forth discussions, and documenting other forms of communication such as phone calls and verbal conversations as you would with a memo-to-file. Only those on the distribution (To or CC) can see the message.

There are two ways to create a **Communication** record. Enter the **Communication** directly through the **Navigation Pane** or use the **Related Objects** tab of an **RFI**. Starting in the **Navigation Pane** of the relevant project, open the **Communications** folder.



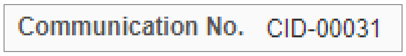
This will pull up a list of existing communications on this project. At the top, right of the screen, select **Add Communication**.

Complete the required fields in the **Communication Detail** screen.

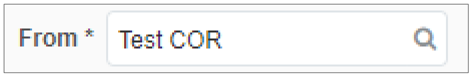


Below is a brief description of each field:

- **<u>Communication No.</u>**: This field generates a number automatically to organize **Communications**.

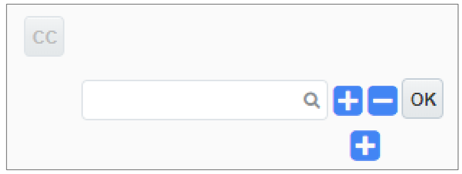


- **<u>From</u>**: This field will contain the sender's name.



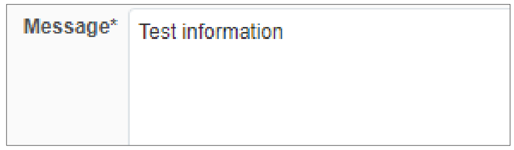
- **<u>To</u>**: Using the dropdown menu, select the team member to receive this Communication.

- **CC**: Use this button to copy additional people into the message. They will not be able to respond, but they can view all comments.

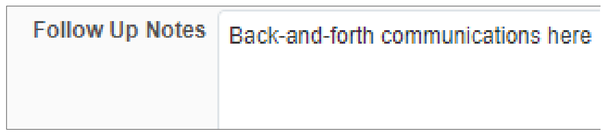


- **Subject**: Enter a short, descriptive title to give a synopsis of the message.

- **Message**: Write out everything needed to describe the situation.

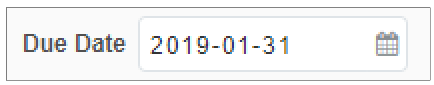


- **Follow-Up Notes**: This section may be completed after receiving a response so that an official record of the decision is captured.

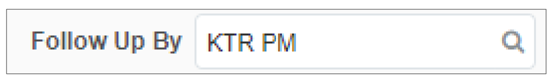


- **Follow-Up Required**: Select this button if a response is required from the recipient. If it is for informational purposes only, this can be left blank.

- **Due Date**: Using the calendar icon next to this field, select the deadline that the recipient has to respond.



- **Follow-Up By**: The person responding to the communication can use the dropdown menu to list their name here when responding. If someone else provided the answer, they can list them here.



- **Done On**: This field will auto-populate when the Communication is closed.

- **<u>Comments</u>**: The person responding can provide their feedback here.

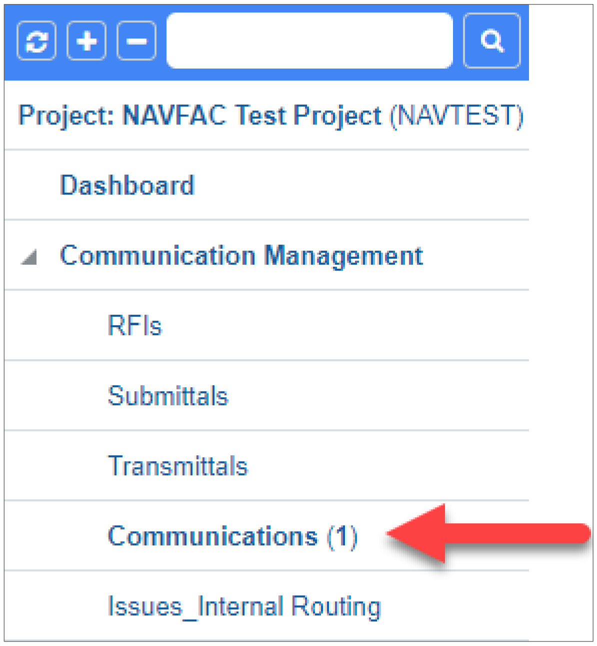
Upon completion of the required fields and adding the message, click **Submit** in the top, right of the screen.

This will send the **Communication** to the recipient and add the due date to their **My Actions** and **Calendar**.

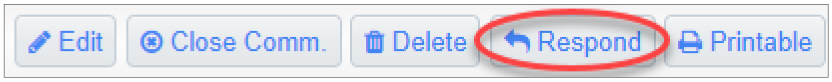
To add a **Communication** through the **Related Objects** tab of an application, see ***Section 3.2.3.2*** and select **Communication**. Then follow the instructions in this section.

3.3.3 Responding to Communications

When the recipient opens the project in eCMS, they will see any new communications bolded in the **Communications** folder.



The recipient can then open the **Communication**, and respond by clicking **Respond** in the top, right of the screen.

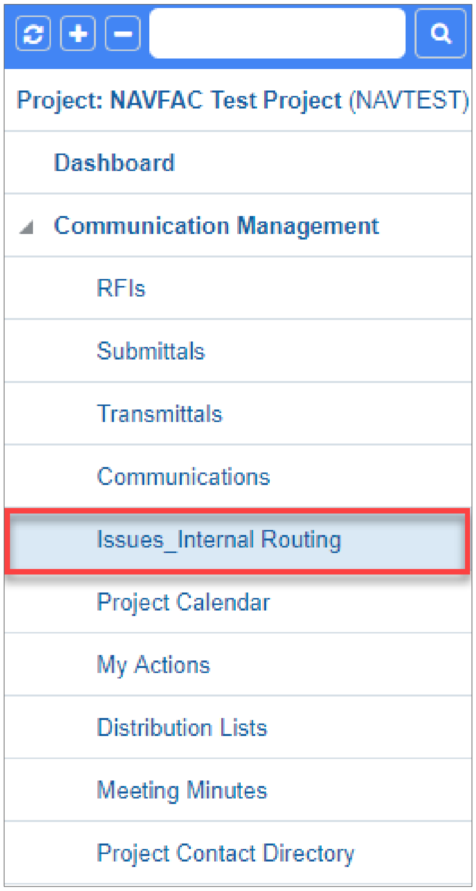


A small box will appear at the bottom of the screen for the recipient to add their response.

After the response has been added, click **Submit** in the top, right of the screen.

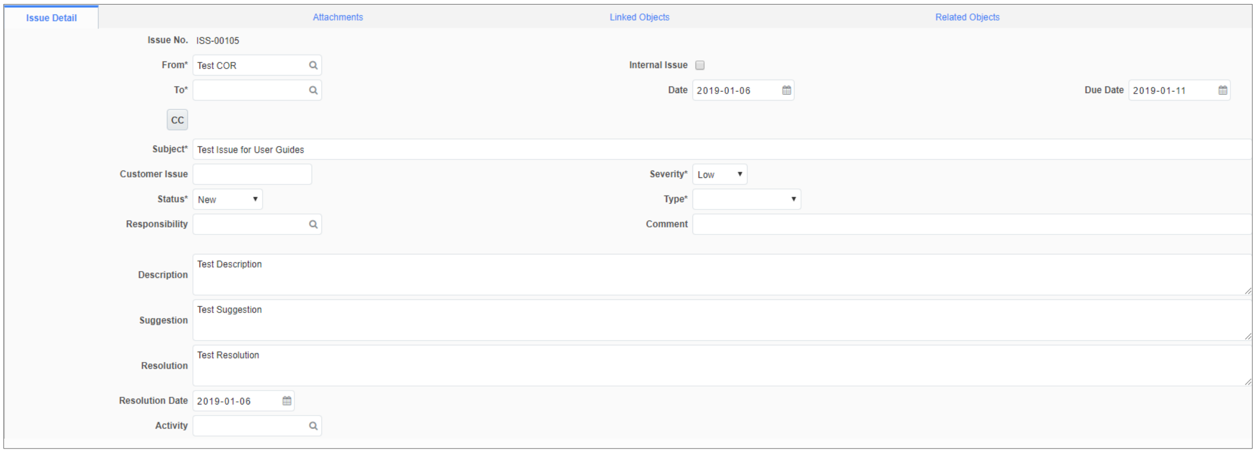
3.3.4 Adding Issues_Internal Routing

Issues/Internal Routing (IR) can be used to document potential problems that may result in a project change, to communication technical information or reports, and to link concerns to specific RFIs or Submittals. There are two ways to create an **IR** record. Enter the **IR** directly through the **Navigation Pane** or use the **Related Objects** tab of an **RFI**. Starting in the **Navigation Pane** of the project, open the **Internal Routing** folder.



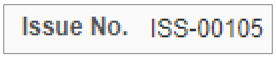
This will pull up a list of existing communications regarding this RFI. At the top, right of the screen, select **Add Issue**.

In the **Issue Detail** screen that appears, complete the required fields.

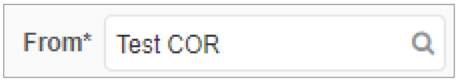


Below is a brief description of each field:

- **Issue No.**: This field generates a number automatically to organize **IRs**.

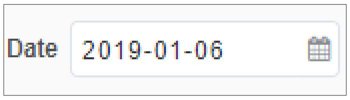


- **From**: This field will contain the sender's name.

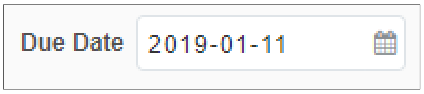


- **To**: Using the dropdown menu, select the team member to receive this **IR**.

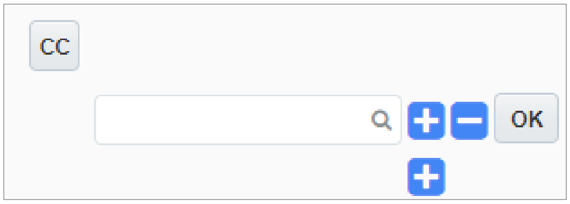
- **Date**: The date the **IR** is created.



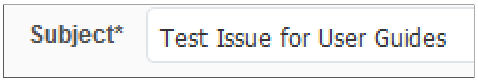
- **Due Date**: Using the calendar icon next to this field, select the response deadline for the recipient.



- **CC**: Use this button to copy additional people into the message. They are unable to respond, but, can view all comments.

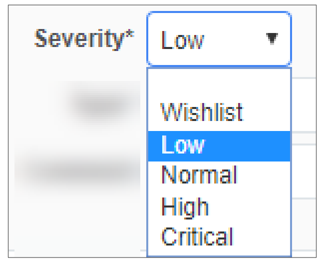


- **Subject**: Enter a short, descriptive title to give a synopsis of the message.

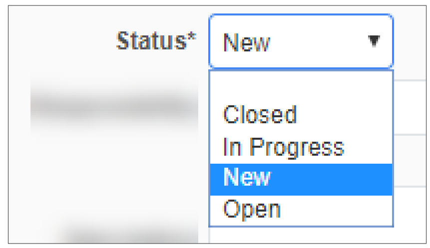


- **Customer Issue**: Leave this field blank

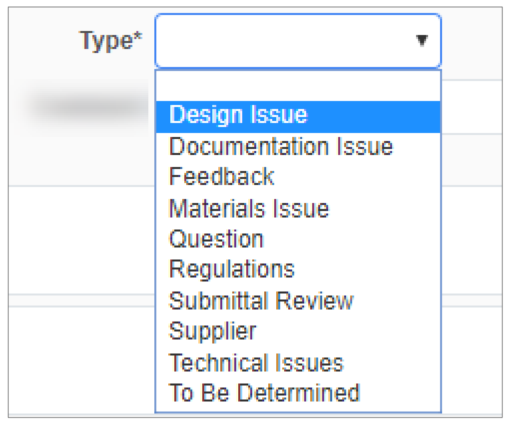
- **Severity**: Choose the **Severity** of the Issue. Use Wishlist if it is something that would make things easier, but the job can be done without it.



- **Status**: The **Status** will default to **New** when created. If updating an IR record, change the status to **Open, In Progress**, or **Closed**.



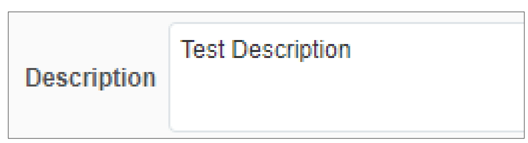
- **Type**: Using the dropdown, select the **Type** that best describes the IR.



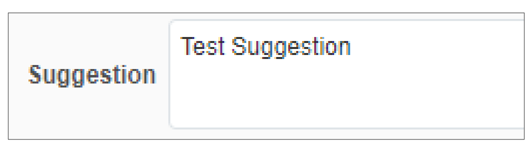
- **Responsibility**: Use the dropdown to select the person responsible for managing this IR task

- **Comment**: Used to provide additional information or thoughts

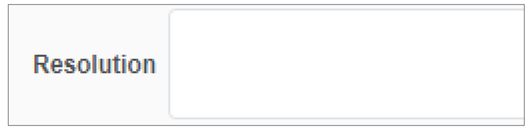
- **Description**: Describe the IR issue and tasks



- **Suggestion**: Respondent to make suggestions in this field if IR is not ready to be resolved



- **Resolution**: Once a decision has been made, and the IR is resolved, enter the final resolution in this field.



- **Resolution Date**: Select the calendar icon next to this field to enter the date this issue was officially resolved

- **Activity**: If applicable, select an **Activity** that the Issue is related to.

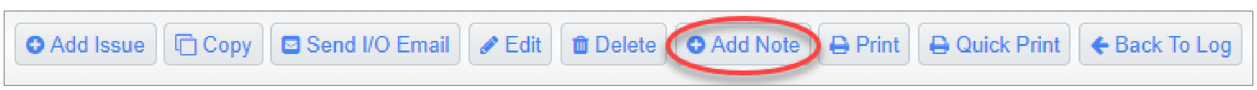
After completing all of the required fields, if you need to save the **IR** as a draft, select **Save** on the upper-right corner. If the **IR** is ready to be submitted, click **Submit**.

This will send the **IR** to the recipient and add the due date to their **My Actions** and **Calendar**.

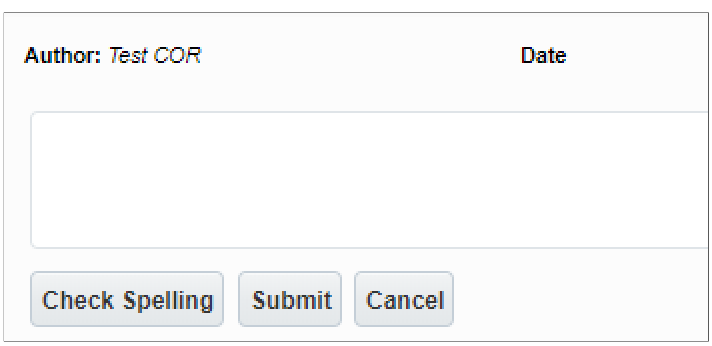
To add an **IR** through the **Related Objects** tab of an RFI, see ***Section 3.2.3.2*** and select **Issue**. Then follow the instructions in this section.

3.3.4.1 Responding to Issues

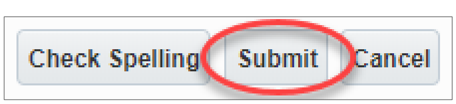
When the recipient opens the project in eCMS, they will see the new **Internal Routing** task bolded in the **Internal Routing** folder. The recipient can then open the **IR**, and respond by clicking **Add Note** in the top, right of the screen.



Selecting **Add Note** will open a small box at the bottom of the screen for the recipient to add their response.



After the response has been added, click **Submit** in the top, right of the screen.



3.3.5 Sorting Data

Select the **Communications or Internal Routing** button in the navigation bar on the left side of the screen to pull up a list of all Communications or Issues (See ***Section 3.3*** for reference).

From here, see ***Section 3.2.5*** on how to use each sorting method.

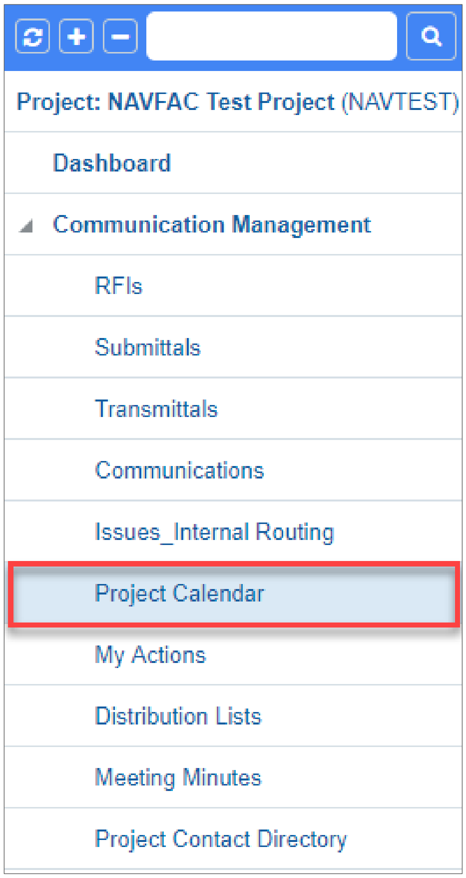
3.4. Project Calendar

3.4.1 Purpose

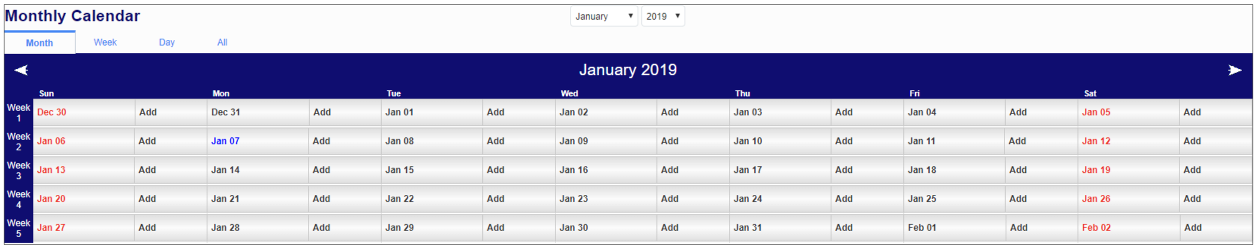
The Project Calendar is your resource for tracking the date RFIs and Submittals were received by their due date, and any Action Items or Issue requests received and due. This lesson will cover:

- Accessing your Project Calendar
- Setting your calendar preferences
- Adding Action Items to your calendar

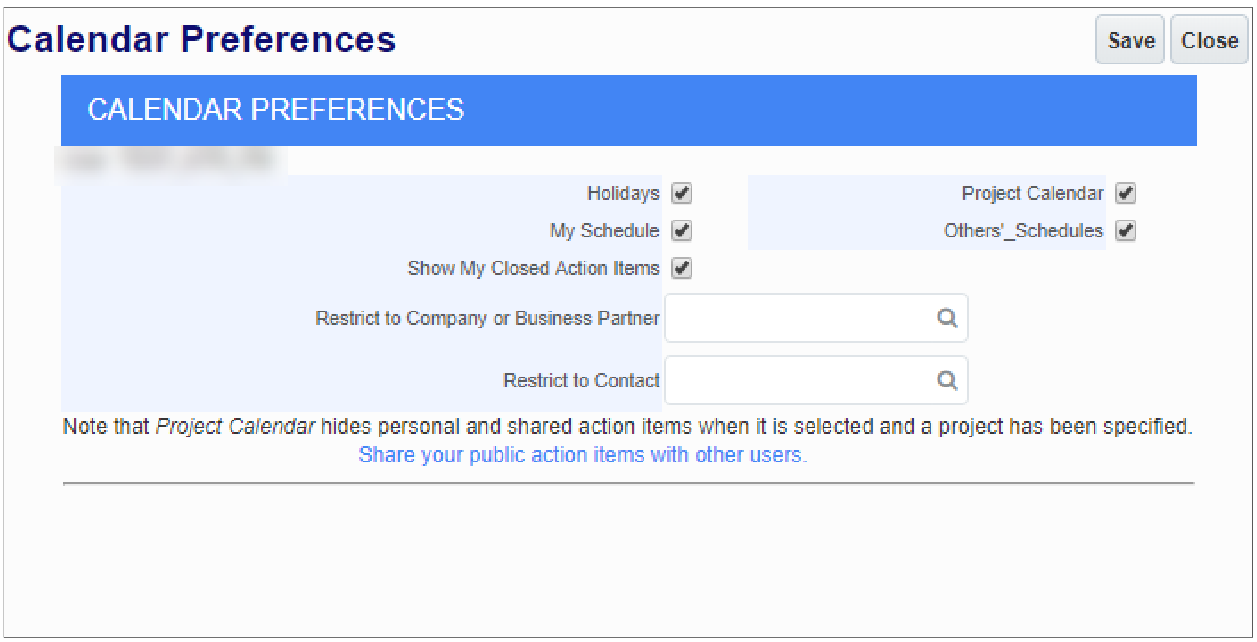
To access the Project Calendar, go to the Navigation Pane on the left side of the screen, open the Communication Management folder and select **Project Calendar**.



The Project Calendar for the current month will appear. Navigate between Month, Week, Day, and All views by selecting the tabs at the top of the Calendar.



Edit Preferences to change visibility or add holidays by selecting the link in the top, right corner of the screen. A new popup will appear.



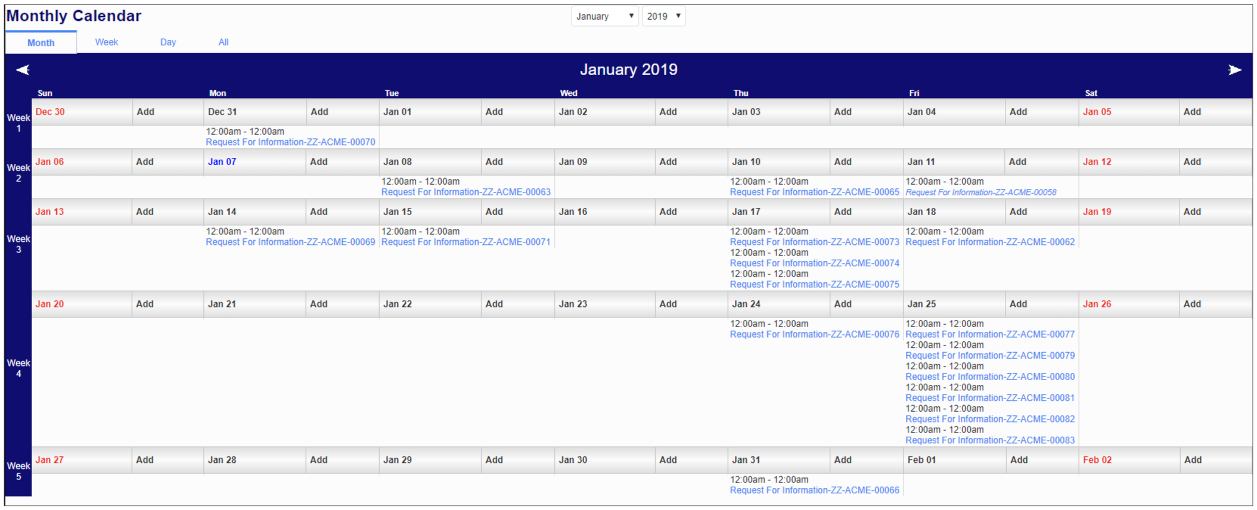
From this screen, users will be able to add holidays to their project calendar, see other team members' schedules, hide or view their own calendar or closed action items, and see the entire project calendar.

In the data fields for **Restrict to Company or Business Partner**, choose a company to hide the action items from. For instance, to only see action items for NAVFAC and the Architecture/Engineer contractor, you could restrict the General Contractor's company to hide their action items.

If you want to restrict a certain person's action items, you may select them from the dropdown menu next to the **Restrict to Contact** data field.

3.4.2 Adding Action Items to Calendar

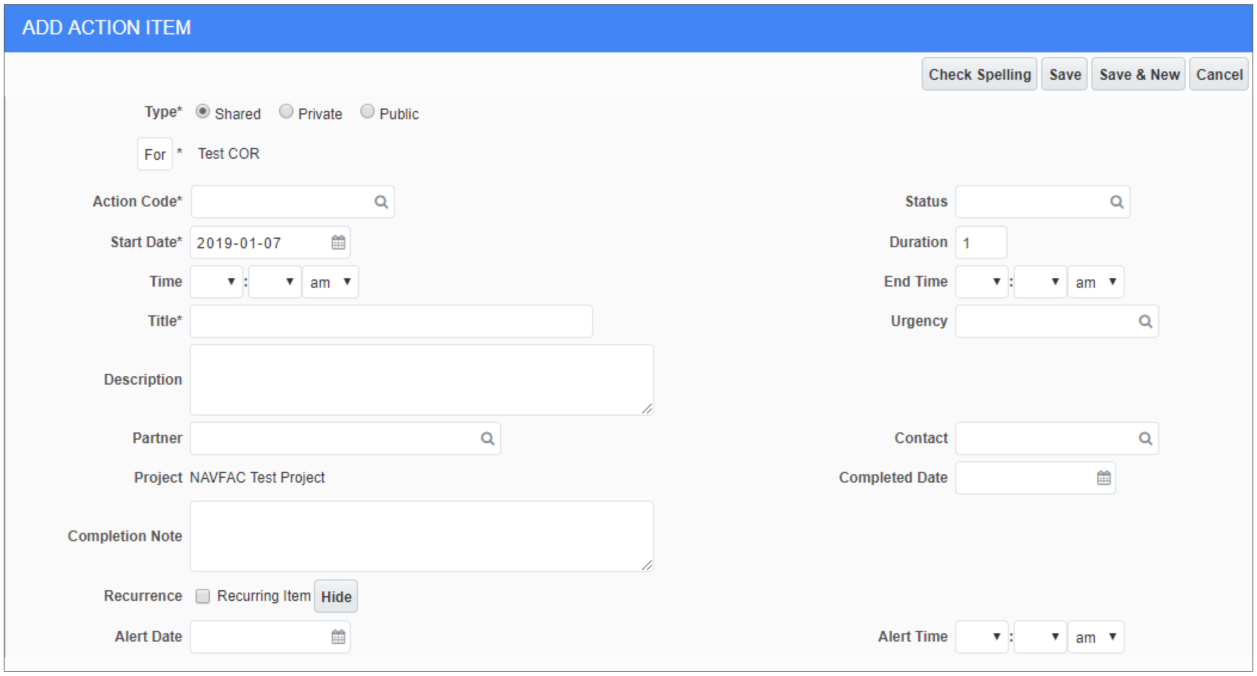
When a user creates an RFI, Submittal, Communication, or Issue, eCMS automatically adds the due date to the calendar of the person assigned to the task.



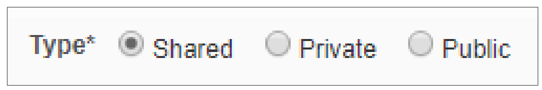
To add events and reminders to your own calendar, select **Add Action Item** from the top, right of the screen.

There is a button for **Outlook Import/Export** at the top, right of the screen. Currently, this functionality has been disabled and you will not be able to use this feature.

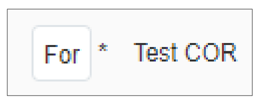
Once the "Add Action Item" screen appears, complete the form to add an action item to your calendar or someone on your team.



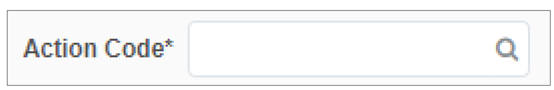
- **Type**: Select the button to display if this action item is shared with a specific team, private (only displayed for creator), or public to the entire project team.



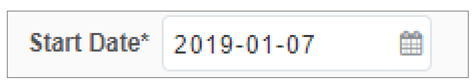
- **For**: Use the dropdown to select the responsible person



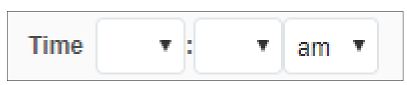
- **Action Code**: This field can be left as is



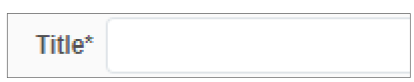
- **Start Date**: Date the action item is assigned



- **Time**: Time the action item is assigned



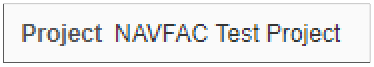
- **Title**: Title of the action item



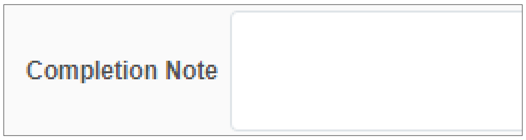
- **Description**: Description of required tasks

- **Partner**: Use the dropdown menu to select if there is a partner organization working on this action item.

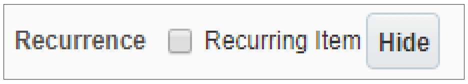
- **Project**: The project field will be filled in with the project being viewed.



- **Completion Note**: Any notes after the action item is complete for documentation



- **Recurrence**: Use this function to set up a recurring action item. When selected, additional fields will appear that allow the user to set daily, weekly, monthly, or yearly recurrence.



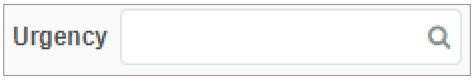
- **Alert Date**: Set an alert for the action item

- **Status**: Use the dropdown menu to select the status of the action item.

- **Duration**: This field is not required.

- **End Time**: Time when action item is completed.

- **Urgency**: Using the dropdown menu next to the field, set the urgency of the action item. Your options are **Deferred, High, Low, Ongoing, Pending, Urgent,** or **To Be Determined.**



- **Contact**: Use the dropdown to select the contact for this action item. A list of all project team members will appear.

- **Completed Date**: The date the action item is completed.

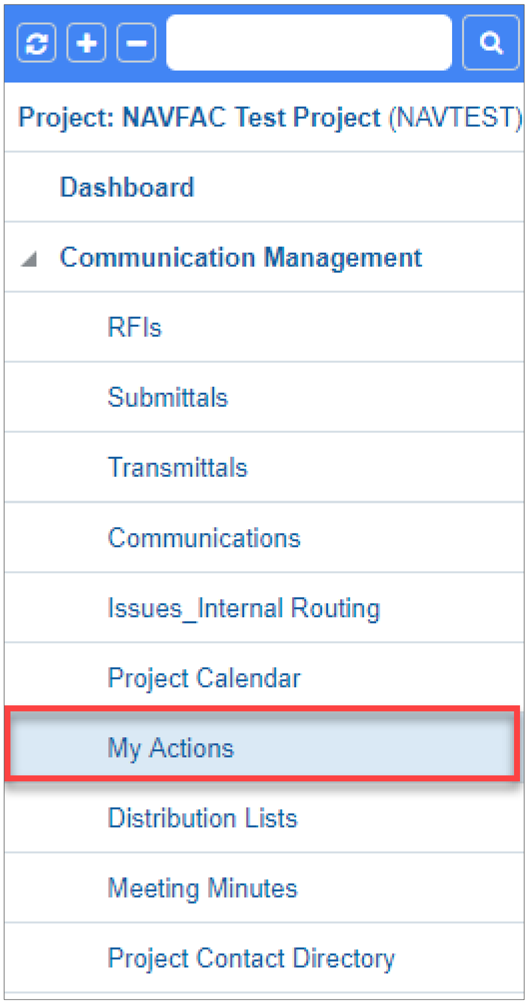
- **Alert Time**: Set a time to receive an alert.

If this Action Item is a recurring action, check the box next to Recurring Item. This will open additional fields allowing you to set daily, weekly, monthly, or yearly recurrence.

After completing the form, click “Save” in the top, right of the pop-up screen. The action item will now appear on the project calendar.

3.5. My Actions

My Actions are a list of upcoming due dates for RFIs, Submittals, Action Items, Communications, and Issues or Internal Routing tasks. Find the **My Actions** section of a project under the **Communication Management** folder in the **Navigation Pane** on the left side of the screen.



This will pull up a list of your action items organized by date.

MY ACTIONS			
NAVFAC Test Project			
ITEMS			GROUP BY TYPE
Overdue (64)			
Today (0)			
No Actions			
Tomorrow (1)			
2019-01-08	Request For Information	ZZ-ACME-00063	[illegible]
This Week (3)			
2019-01-10	Request For Information	ZZ-ACME-00065	[illegible]
2019-01-14	Request For Information	ZZ-ACME-00069	[illegible]
2019-01-15	Request For Information	ZZ-ACME-00071	Finish selection
Following Week (3)			
Next 30 Days (5)			
2019-01-24	Request For Information	ZZ-ACME-00076	Test RFI
2019-01-25	Request For Information	ZZ-ACME-00080	[illegible]
2019-01-25	Request For Information	ZZ-ACME-00083	[illegible]
2019-01-25	Request For Information	ZZ-ACME-00081	[illegible]
2019-01-25	Request For Information	ZZ-ACME-00082	[illegible]

To view tasks by type, click on the “Group By Type” link on the header bar. The list will then be reorganized by type.

MY ACTIONS		
NAVFAC Test Project		
ITEMS		GROUP BY DATE
Issue (8)		
2018-02-26	ISS-00004	Testing Ball in Court
2018-05-10	ISS-00047	[illegible]
2018-05-18	ISS-00053	[illegible]
2018-05-21	ISS-00054	[illegible]
2018-05-23	ISS-00050	Submittal #111
2018-05-28	ISS-00048	Submittal 109
2018-05-31	ISS-00059	[illegible]
2018-10-17	ISS-00092	Test
Meeting (1)		
2018-04-27	12345	[illegible]
Notice (1)		
2018-02-14	NOT-00001	Test notice process flow

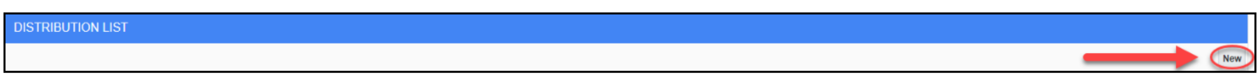
3.6. Distribution Lists

3.6.1 Purpose

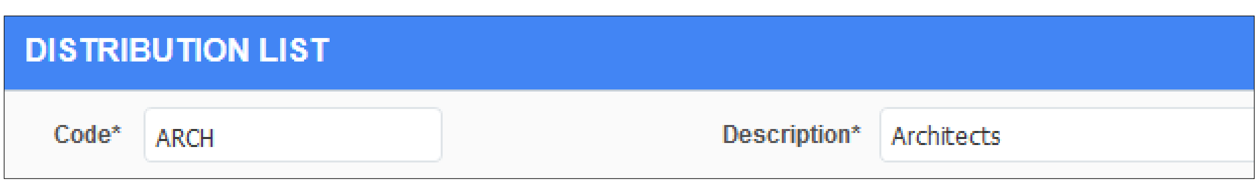
Create **Distribution Lists** to quickly group team members together and add them to **Communications, RFIs**, and **Action Items** with the click of a button. A **Distribution List** is just a group of people organized under a similar goal. **Distribution Lists** can be found under **Communication Management**.

3.6.2 Creating a New Distribution List

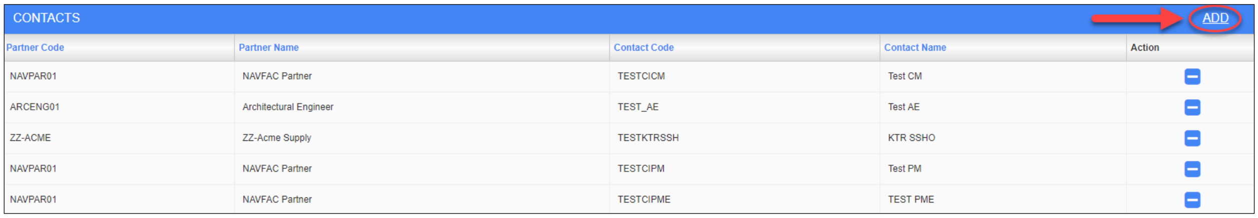
Navigate to the **Distribution Lists** page. In the right corner, select **New**.



Create a **Code** and a **Description** for the new **Distribution List**. The **Code** should be short, and easy to understand. For instance, to create a **Distribution List** of Architects, the **Code** could be "ARCH" and the **Description** would be "Architects". Click **Save**.



To add team members to a **Distribution List**, highlight the list and click **Add** in the **Contacts** section of the screen.

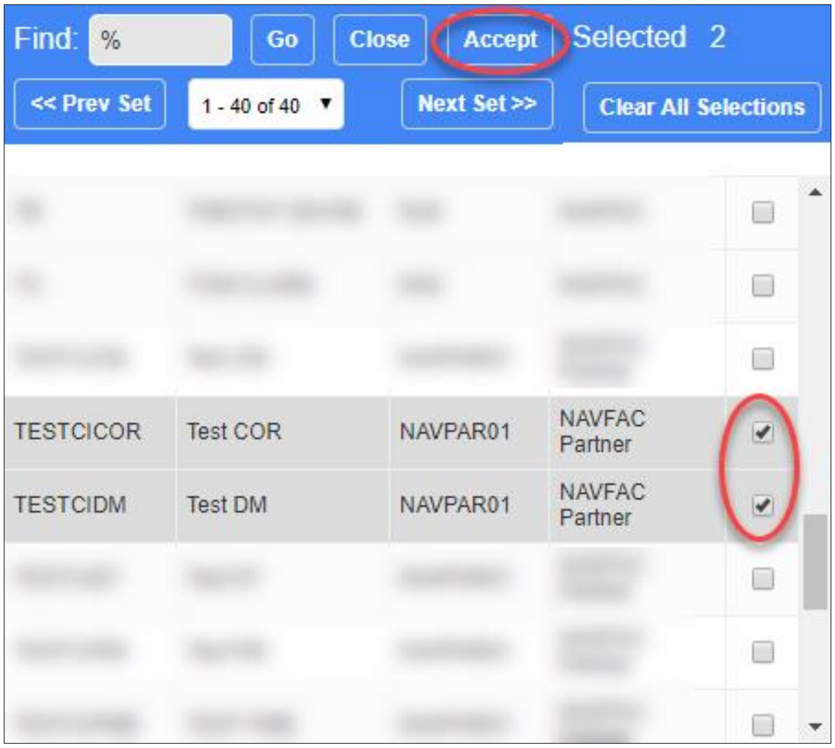


CONTACTS ADD

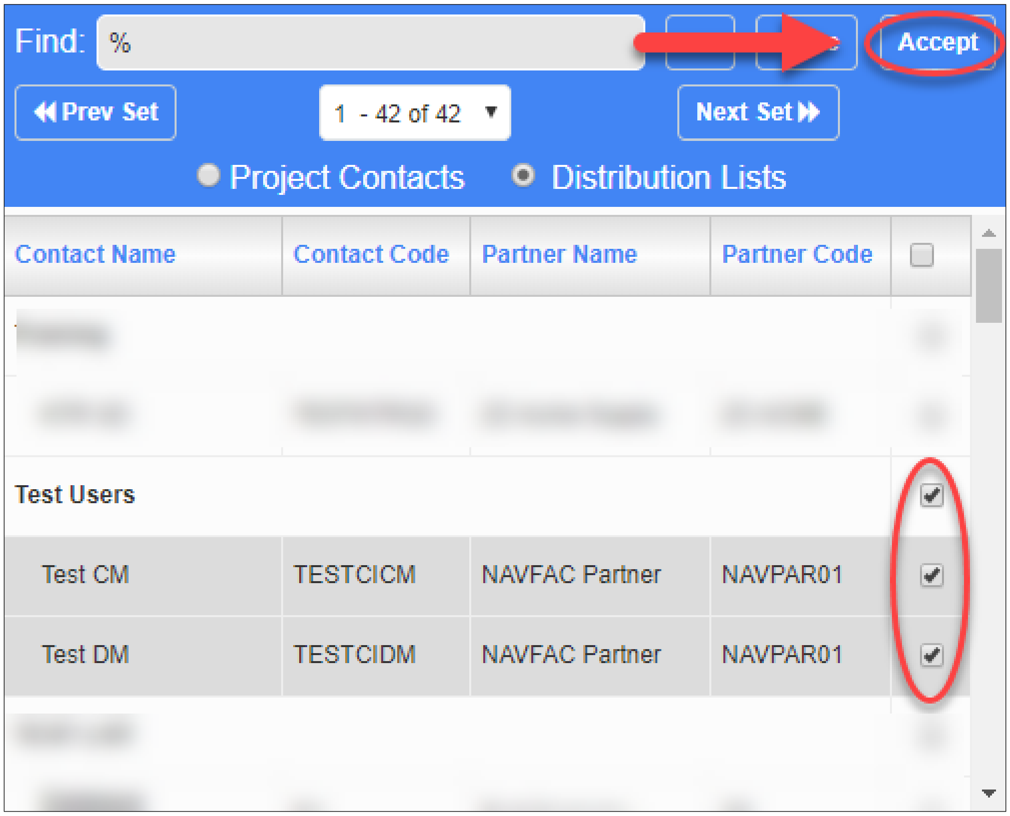
Partner Code	Partner Name	Contact Code	Contact Name	Action
NAVPAR01	NAVFAC Partner	TESTCICM	Test CM	
ARCENG01	Architectural Engineer	TEST_AE	Test AE	
ZZ-ACME	ZZ-Acme Supply	TESTKTRSSH	KTR SSHO	
NAVPAR01	NAVFAC Partner	TESTCIPM	Test PM	
NAVPAR01	NAVFAC Partner	TESTCIPME	TEST PME	

A popup will appear with a list of project team members. Select the team members that belong in the **Distribution List** by checking the box next to their name and selecting **Accept**.

3.6.3 Using Distribution Lists within the System



When accessing other sections of the eCMS system, such as **RFIs, Communications, or Internal Routing**, there is a **CC** section. When selecting a user to CC, select **Distribution Lists**.

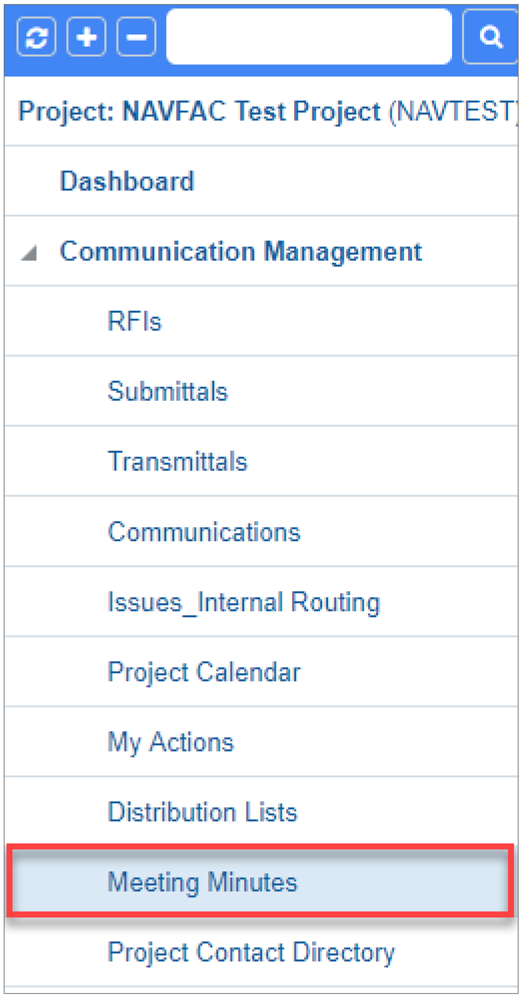


NOTE: Using the **CC** function or **Distribution Lists** will allow the selected group of people to view the information, but will not add the information to their calendars or action items.

3.7. Meeting Minutes

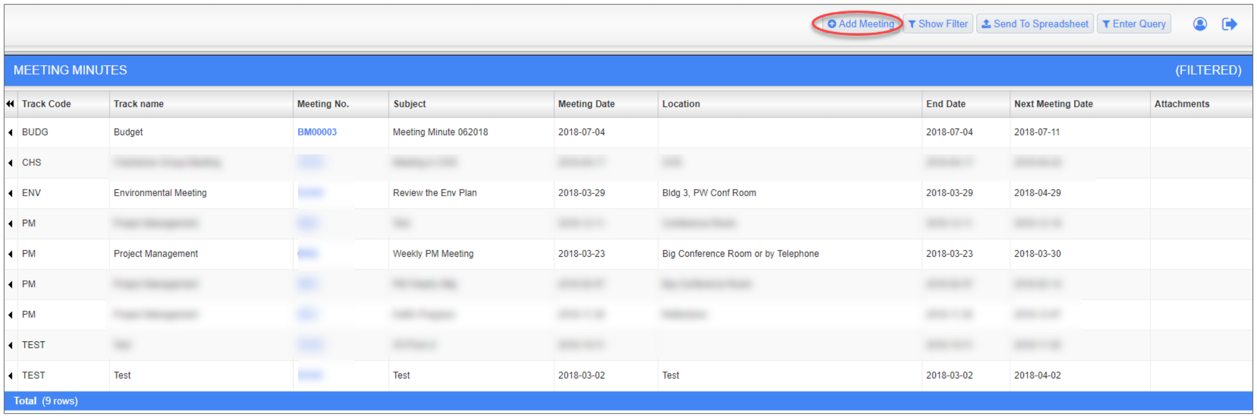
3.7.1 Purpose

Track **Meeting Minutes** in the eCMS system to document discussions and create action items attached to a project. Find the **Meeting Minutes** folder in the **Navigation Pane** on the left side of the screen listed under the **Communications Management** folder.



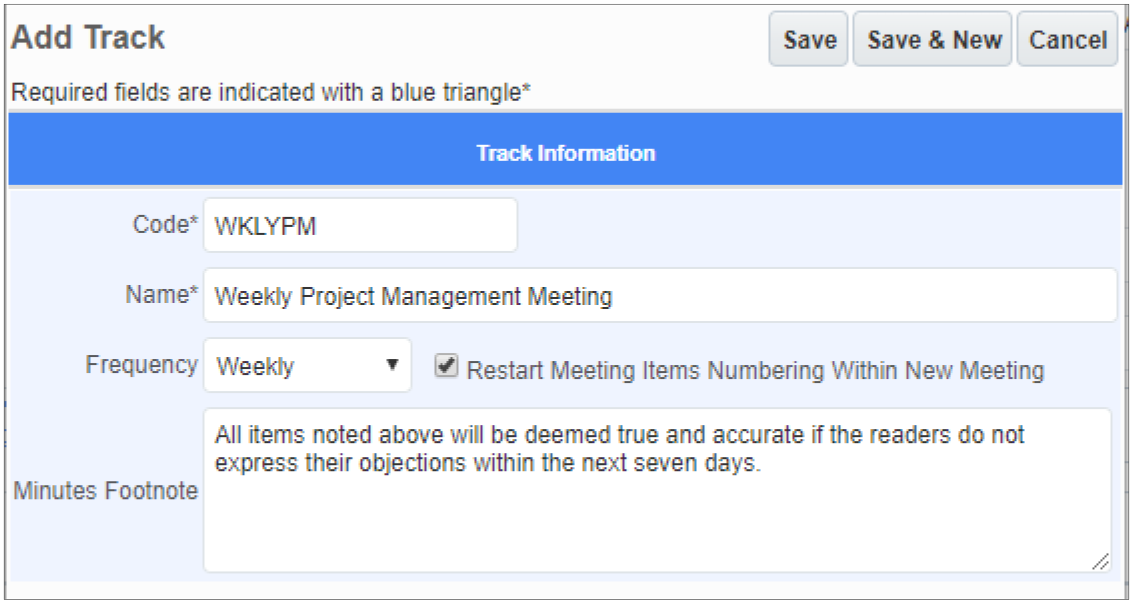
3.7.2 Add a Meeting

To modify an existing meeting, select it from the list on the screen. If you want to create a new meeting, select “Add Meeting” in the top, right corner of the screen. This will open a new screen called “Meeting Information.”



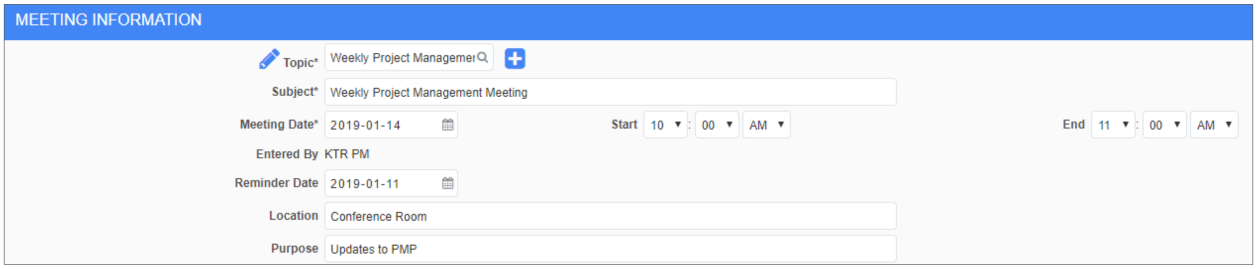
The first field you will see is “Topic.” Topics will vary by project and are the most logical groups to organize information. You can choose to use an existing “Topic” or create a new one. If this is the first time scheduling a meeting on the project, you will most likely have to create new topics. Choose an existing “Topic” by selecting the dropdown menu and selecting the topic. To create a new topic, click the plus sign next to the field.

If you choose to add a topic, a new popup will appear. The first field you will see is “Code.” The Code can be anything you choose, up to ten characters. For example, if you are scheduling a weekly project management meeting, the code could be WKLYPM. After completing all fields, click “Save.”



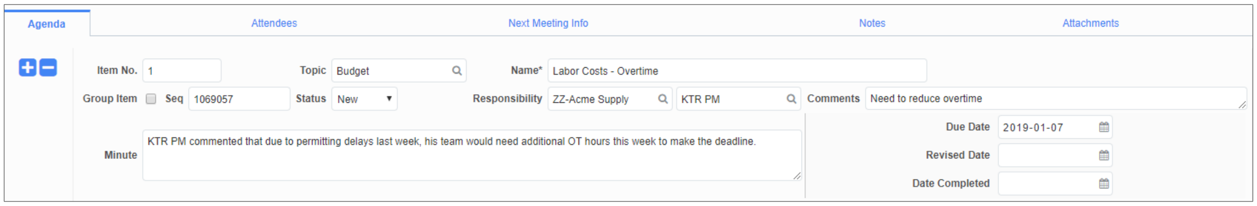
You can now open the dropdown next to “Topic” and select the topic you just created. You can then create a Subject for the meetings, Set the start date and times, schedule a reminder to go out to attendees, and write the location and purpose of the meeting. Save the Meeting if you are ready to add attendees or Save a Draft if you need to gather additional information.

Once you save, the screen will show “Not Submitted” at the top. You can return to this meeting and make updates at any time. Just click the “Edit,” button to add Agendas, Attendees, Next Meeting Info, Notes, or Attachments.

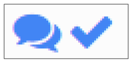


3.7.3 Agenda

To add agenda items, click on the “Agenda” tab on the screen. Create an item number, select or create a topic for the agenda item. For this example, the agenda item relates to the budget, and will be categorized as a “Budget” topic. In the “Name” data field, be more specific regarding what this agenda item is about. For instance, this item is about Overtime. You can select a person to be responsible for tracking this item, and in the minute field, write what was discussed in the meeting. If you schedule a due date, it will show up on the Project Calendar and My Actions list of the person responsible.

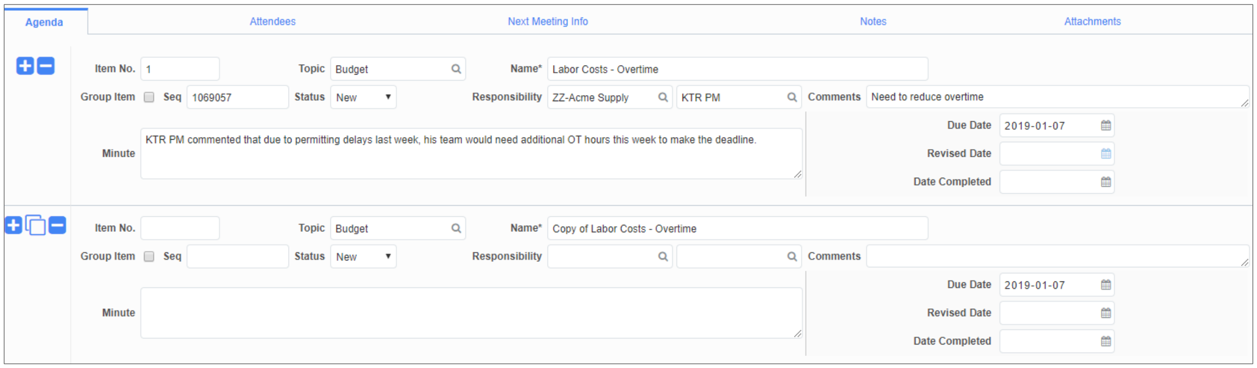


Click **Save**. If you want to add a note to an agenda item, or mark an item as complete, you can do that with the icons that appear on the side of the item.



3.7.3.1 Copy Agenda Items

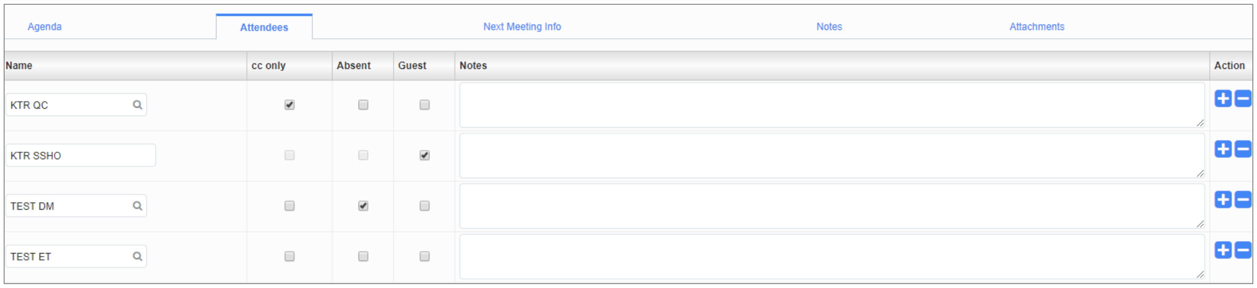
Once Agenda Items are created, you can copy them to save time. To do this, click on the blue plus sign to create a new Agenda Item, then click on the icon to the left of the new item that looks like two pieces of paper. This will copy the agenda item above it, so you can add different discussions or action items from a meeting. Don't forget to save after each item is created.



3.7.4 Add Attendees

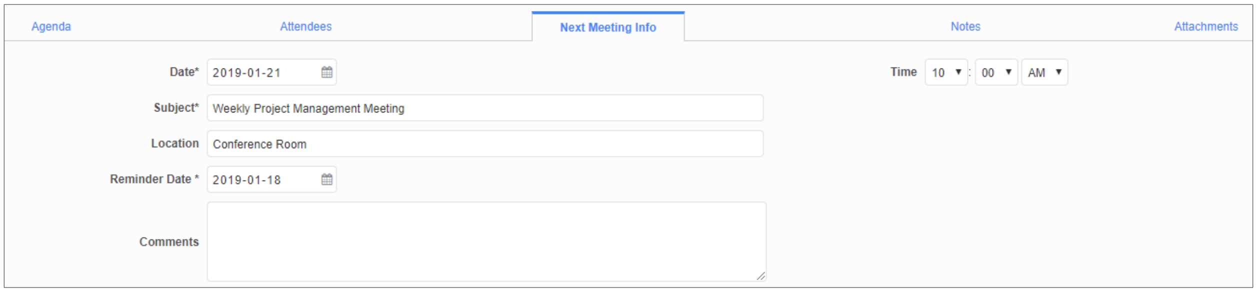
Add everyone invited to the meeting and record their attendance. Click the blue plus sign underneath the Action column. This opens the row for adding team members. Click the magnifying glass icon under the "Name" column.

A popup will appear with everyone currently assigned to the project. Select the team members that attended or were invited to this meeting and click "Accept." Save.



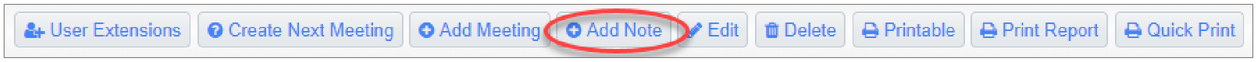
3.7.5 Next Meeting Info

This section will display if a related meeting is scheduled. Click on the **Next Meeting Info** tab on the **Meeting Detail** screen.



3.7.6 Notes and Attachments

The last two tabs are “Notes” and “Attachments.” If you want to add notes or attachments, click on the tab, and then go to the top of the screen. For notes, click **Add Note**.



For Attachments, click **Upload Multiple** to upload a single or multiple attachment.

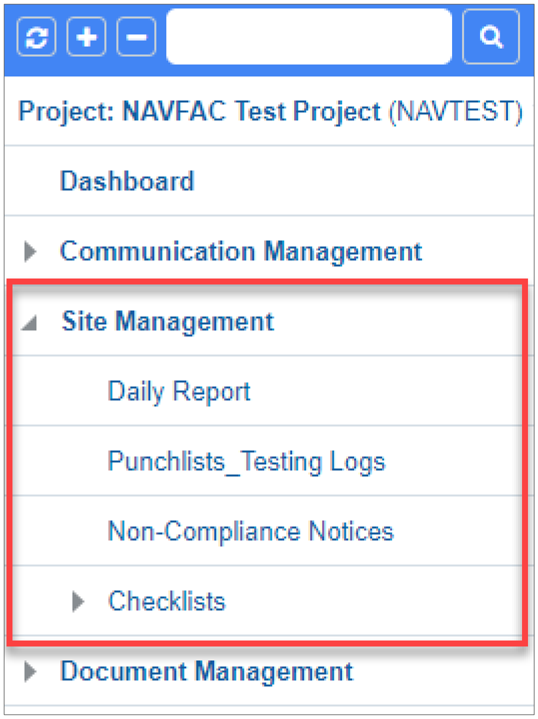
Once you have added all of the information to your meeting, click the “Submit” button at the top of the screen. You can return to this meeting at any time by using the Communications Management folder in the navigation pane.

4. SITE MANAGEMENT

4.1. Background

The Site Management section contains Daily Reports, Punchlists, and Checklists that serve as deliverables KTRs give to NAVFAC. Site Management also contains Non-Compliance Notices, which the government can issue to KTRs. These features allow KTRs to easily add, track, and update deliverables within the project.

Use the **Navigation Pane** on the left side of the screen under the **Site Management** folder to find the following folders.



4.2. Daily Reports

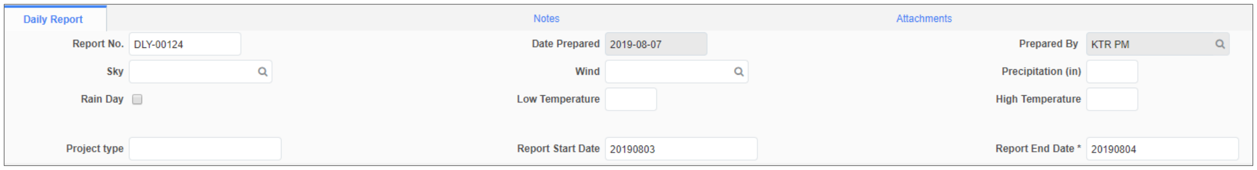
Daily Reports offer an easy place to keep track of safety, material, and labor on a project. To access **Daily Reports**, go to the **Navigation Pane**, select **Site Management**, and then **Daily Report**.

This will open a screen to start the **Daily Report**. This will open the Daily Report Log where you can view all Daily Reports submitted for this project. Click **Add Daily Report** from the top, right corner to create a new report.

4.2.1 Information in a Daily Report

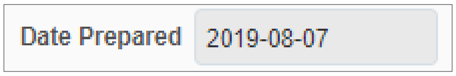
4.2.1.1 Report Identifiers

At the top of each new report is a screen to collect information identifying the report, the date, conditions on-site, and the crew and project manager working.

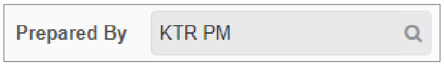


- **Report No.**: The **Report No.** is filled in automatically.

- **Date Prepared**: The **Date Prepared** is also automatically filled in with the day the report is created.



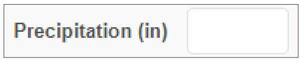
- **<u>Prepared By</u>**: The **Prepared By** section shows the name of the user creating the report.



- **<u>Sky</u>**: Use the dropdown (magnifying glass icon) to select the sky conditions for the day.

- **<u>Wind</u>**: Use the dropdown (magnifying glass icon) to select the wind conditions for the day.

- **<u>Precipitation (F)</u>**: Log total precipitation for the day in inches.



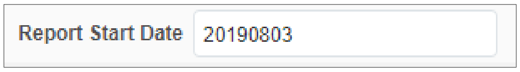
- **<u>Rain Day</u>**: Select this button if there is rain.

- **<u>Low Temperature (F)</u>**: Enter the minimum temperature for the day.

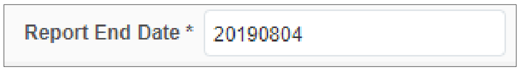
- **<u>High Temperature (F)</u>**: Enter the maximum temperature for the day.

- **<u>Project Type</u>**: Use the box in this field to type if this is a Construction Project (CON) or Facilities Services Project (FSC).

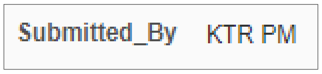
- **<u>Report Start Date</u>**: The Report Start and End Dates can be used when a Daily Report is being submitted for a date range or date that is not the day the report is created.



- **<u>Report End Date</u>**: If the report is created on the same day it is covering, just enter the date in this field.

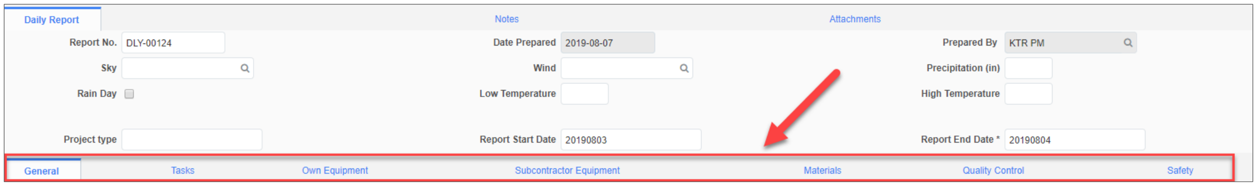


- **<u>Submitted By</u>**: This is a field that displays after Daily Report is submitted. It displays the user that submitted the Daily Report.



4.2.1.2 Daily Report Tabs

After completing the **Report Identifiers** at the top of the **Daily Report**, users will see a list of tabs available to complete different sections of the report.



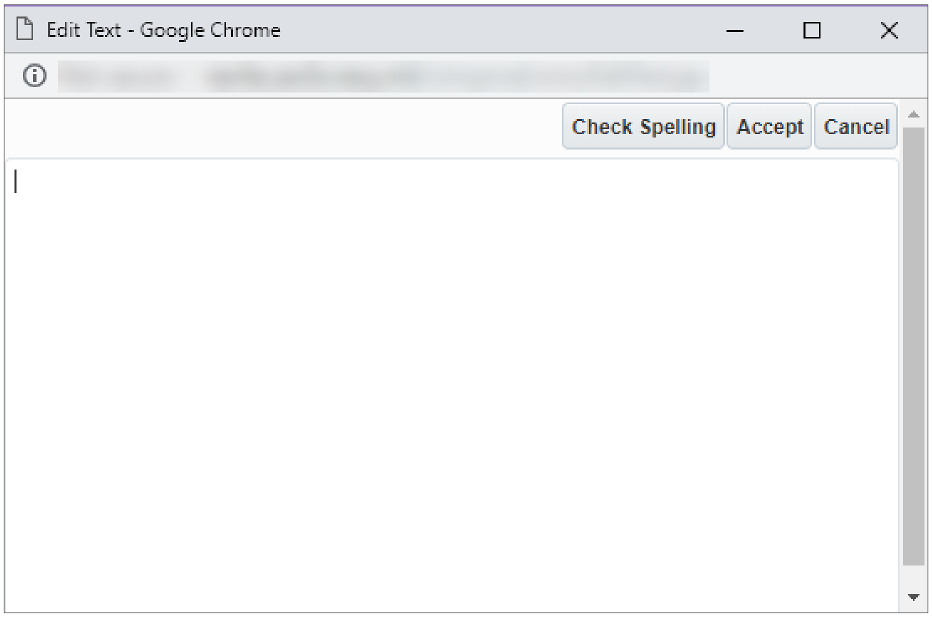
When selected, each tab will open a screen with different sections of a **Daily Report**. The fields in each screen can be completed at the office or in the field on a portable tablet device.

General Tab

Under the **General Tab**, there are seven open-answer fields to start the report. Users may log information with 4,000 characters or less for the following areas:

- Activities
- Work Performed Today
- Problems or Delays
- Subcontractor Progress
- Special Assignments
- Potential Changes
- Incidents on Site

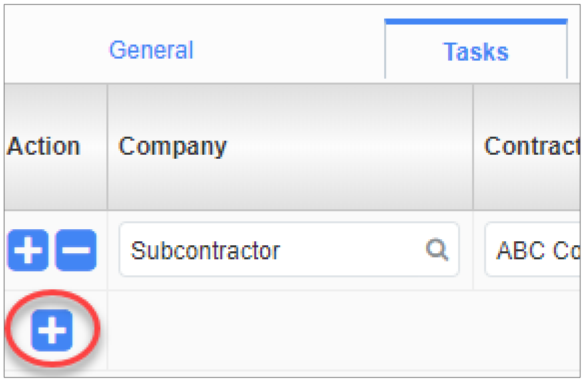
To answer each section, either click in the box and start writing, or double click the box to expand into a larger field. When expanded, users will have the option to check spelling before entering their information.



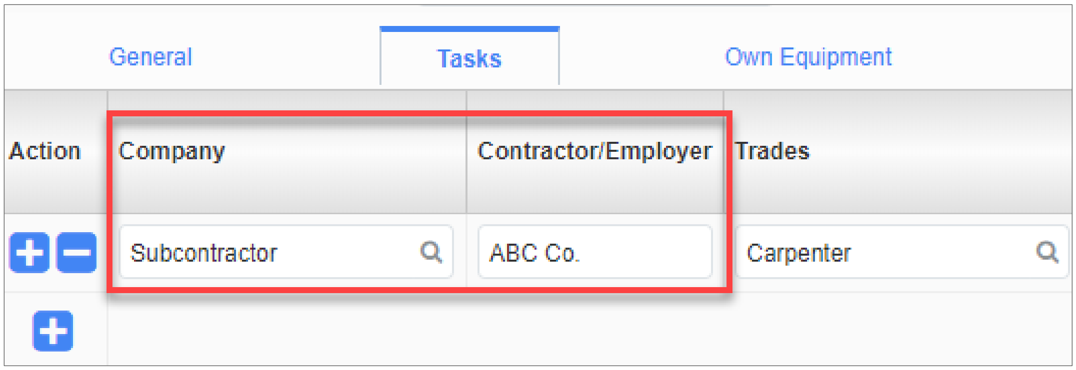
Task

Tasks can keep track of the daily workload, number of staff assigned to a project, the man-hours worked on each team, and any notes.

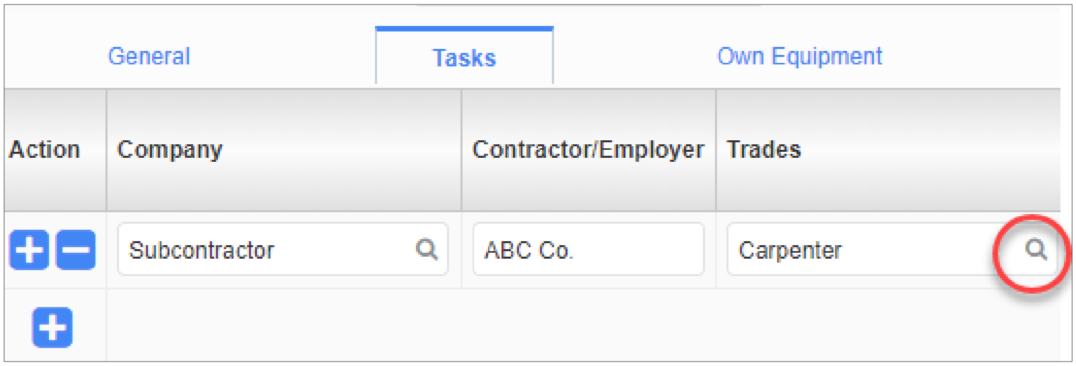
To create a new line, click on the blue plus sign under the **Action** column.



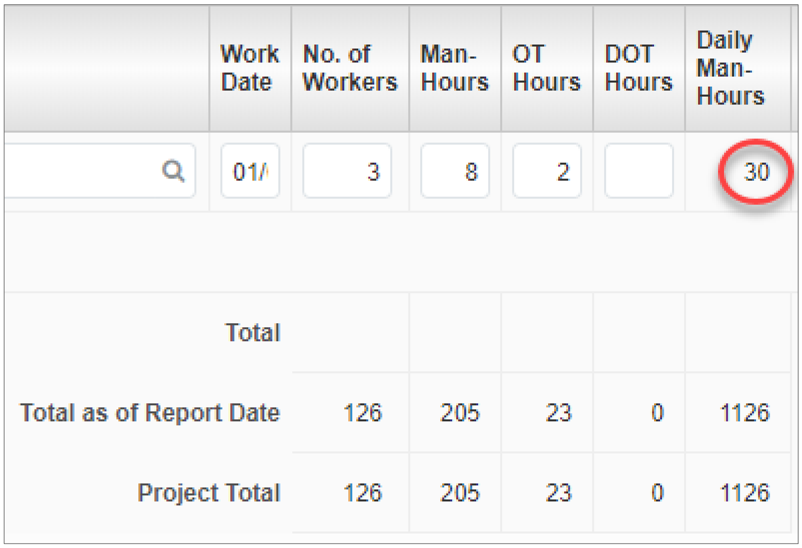
For each new line created, add the **Company**, the **Contractor**, and the **Trade**, for which you are tracking manhours. The company will be the General Prime Contractor, the Architectural Engineering Firm, NAVFAC, or a generic Subcontractor. Subcontractors are not anticipated to have access to eCMS, and therefore, won't be entered into the system. However, you can select Subcontractor as the Company and enter the name of the Subcontractor in the Contractor/Employer field to track their hours.



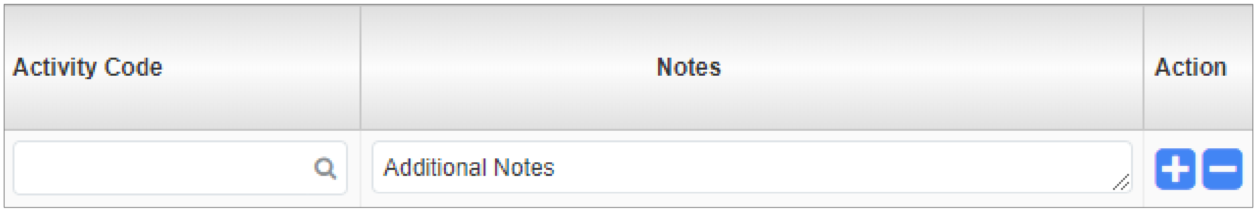
Use the magnifying glass icon to open the list of trades to select the trade you are tracking hours for.



Enter the date in MM/DD/YYYY format in the **Work Date** column. Then you can enter numeric values for **Number of Workers**, **Man-Hours**, **Overtime Hours**, and **Double Overtime Hours**. The Daily Man-Hours field will calculate the total hours worked by all workers. The total of all Daily Reports on the project is calculated in the table below.



If you imported the Schedule Activities with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an Activity Code for this work. Otherwise, leave this field blank. In the Notes column, you can add any additional comments.



Own Equipment

The **Own Equipment** tab can be used by the KTR to track the equipment used on projects. To open a new line, click the blue plus sign under the **Action** column.

General | Tasks | Own Equipment | Subcontractor Equipment | Materials | Quality Control

Validate | Select All | Unselect All

Action	Select	Comp*	Schedule Activity No.	Owner	Tran Code	Job	Phase	Cat	Hours Used	Notes (Work Location and Description)
+										

Enter your company in the **Company** field. If you imported the **Schedule Activities** with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave this field blank. Enter the person responsible for the equipment in the **Owner** field.

Comp*	Schedule Activity No.	Owner
ZZ-Acme Supply		Sally Sue

If you have a Transaction Code, you can type it in the **Tran Code** field. The **Job** field will autofill with the Project Code. If you like to track the **Phase** and **Category**, you can type entries in those fields, but they are not required. Include a numeric value in the **Hours Used** field and any **Notes**, such as the Work Location and Description, in the last field.

Tran Code	Job	Phase	Cat	Hours Used	Notes (Work Location and Description)	Action
1235	NAVTEST	INITIAL	SAWS	3	Lower Floor, Framework	+ −
						+

Subcontractor Equipment

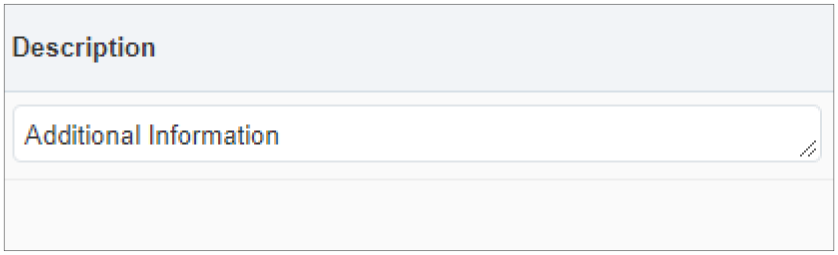
Use the Subcontractor Equipment tab to track the equipment used by the Subcontractors. To add a new line, click the blue plus sign under the Action column.

Action	Owner	Construction Equipment Used Today (incl M
+ −	SUBCON01	Make & Model
+		

Enter the Subcontractor in the **Owner** field. Include the **Equipment Make and Model**.

Owner	Construction Equipment Used Today (incl Make and Model)
SUBCON01	Make & Model

If you need additional room for information or additional details, use the **Description** field.

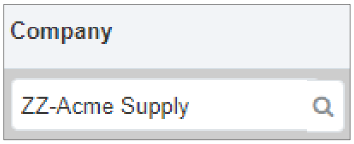


Materials

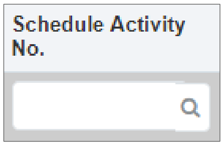
Under the Materials tab, click the blue plus sign under the Action column to create a new **line.**

Then fill out the open fields for Materials. Here are the definitions.

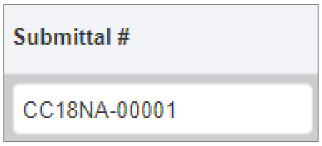
- **Company**: Use the magnifying glass icon to select the company. Choose NAVFAC if submitting on materials for the Navy, Subcontractor if discussing a subcontractor, or the KTR company if reporting for yourself.



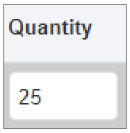
- **Schedule Activity No.**: If you imported the **Schedule Activities** with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave this field blank.



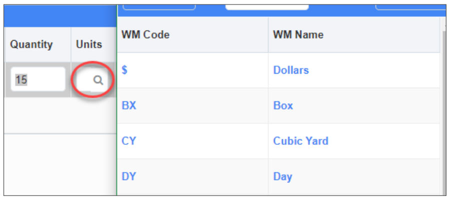
- **Submittal #**: If there is an associated Submittal Number, you can enter it in the **Submittal #** field.



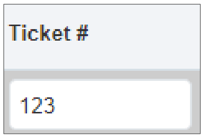
- **Quantity**: Indicate how many units of the material are being used.



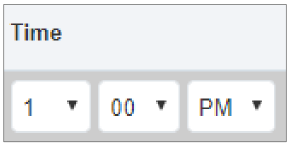
- **Units**: Click the magnifying glass icon to open a list of values for Units. Select the type of Unit, such as Dollars, Box, Cubic Yard, etc., used to measure the material quantities.



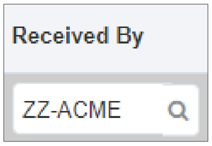
- **Ticket #**: If the material vendor or KTR have an internal ticketing system, track the associated ticket number here.



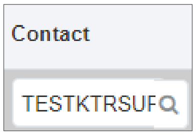
- **Time**: Select the time materials were delivered



- **Received By**: Use the magnifying glass icon to select the company of the person who received the materials.

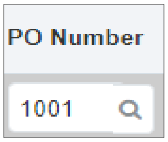


- **Contact**: Use the magnifying glass icon to select the person who received the materials.



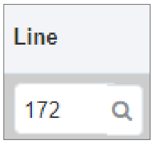
- **Vendor**: Type in the Vendor's Name

- **PO Number**: If using Purchase Orders for materials, the PO Number can be tracked here

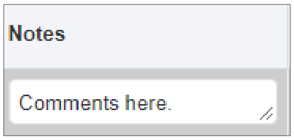


- **Release**: If using release forms, document them here

- **Line**: Indicate the line item being purchased

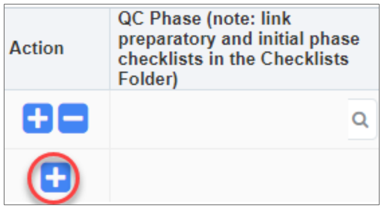


- **Notes**: Record any comments or notes associated with the Notes.

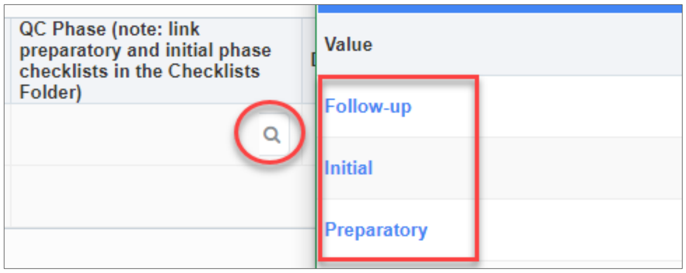


Quality Control

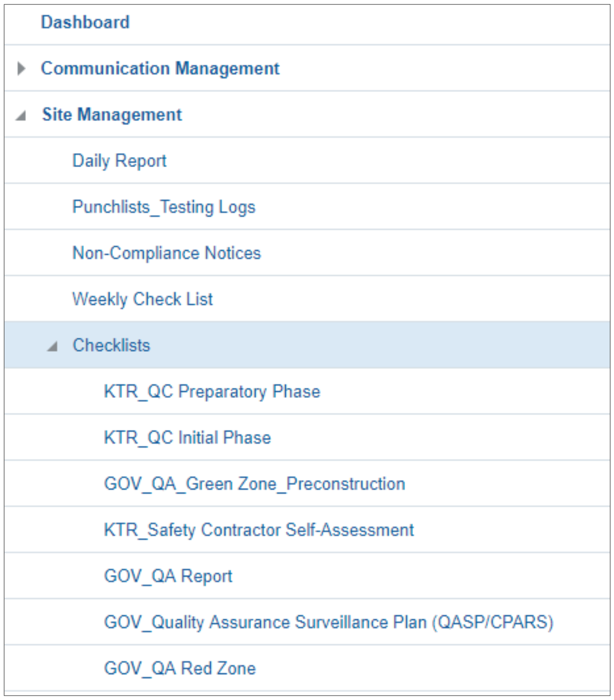
Under the Quality Control tab, click the blue plus sign under the Action column to create a new **line.**



In the next column, **QC Phase**, select the magnifying glass icon to choose the type of checklist completed for this daily report.



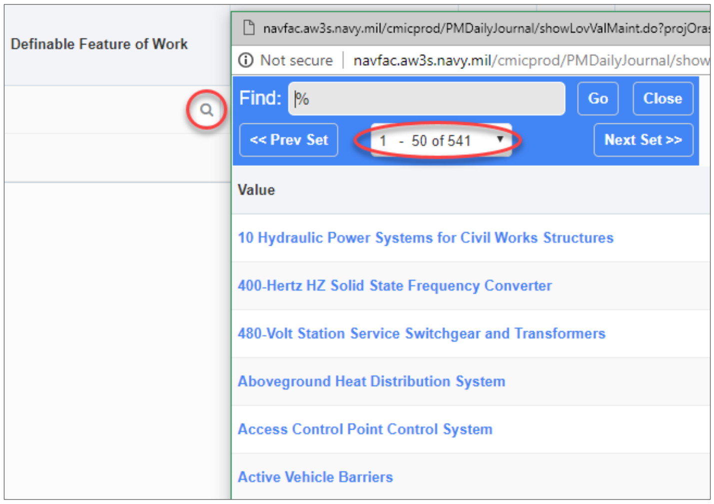
Checklists can be found in the Navigation Pane, under Site Management and then Checklists.



Once the Daily Report is started, complete the checklist, and then link the Daily Report to the checklist using the **Related Objects** tab in the **Checklist**. There is no Related Objects tab in Daily Reports, so this function will need to be completed in the Checklist. Use the **QC Phase** field under the **Quality Control** tab of the **Daily Report** to indicate which checklist was completed.

Action	QC Phase (note: link preparatory and initial phase checklists in the Checklists Folder)
+ −	INITIAL
+	

In the next column, use the magnifying glass icon to select the **Definable Feature of Work**. A pop-up will appear with a list of 541 Definable Features of Work.



If you imported the **Schedule Activities** with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave the Activity Code field blank.

Check the boxes to indicate with the work reported in the Daily Report complied with the Contract and with Safety.

Work Complies with Contract	Work Complies with Safety
☑	☑

The final two columns are comment boxes for **Follow-Up** and **Remarks**. In the Follow-Up box, include information such as 1) Description of Work, 2) Testing Performed & by Whom, 3) Spec Section, 4) Location, and 5) List of Personnel Present. In the Remarks box, if this is the Follow-Up Phase, explain if the work did not comply with the contract or safety. For Re-Work, provide a description, and always include the Manufacturer Representative on-site.

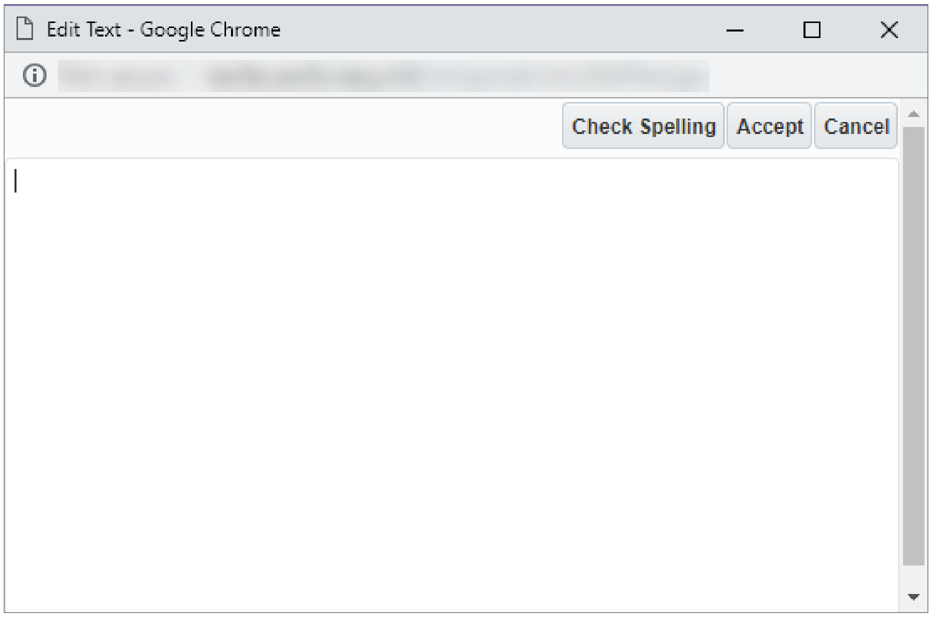
For Follow-up provide 1) Description of Work, 2) Testing Performed & by Whom, 3) Spec Sec, 4) Location, and 5) List of Personnel Present	Remarks - (For Follow-up Phase explain if work does not comply with contract or safety.) (For Re-work provide description) Manufacturer Rep on-site, etc.
1) Description of Work, 2) Testing Performed	Description

Safety

Under the **Safety Tab**, there are six open-answer fields. Users may log information with 4,000 characters or less for the following areas:

- Standards and Policies
- Precautions
- Fail Safe
- Concerns
- Records
- Additional Notes

To answer each section, either click in the box and start writing, or double click the box to expand into a larger field. When expanded, users will have the option to check spelling before entering their information.



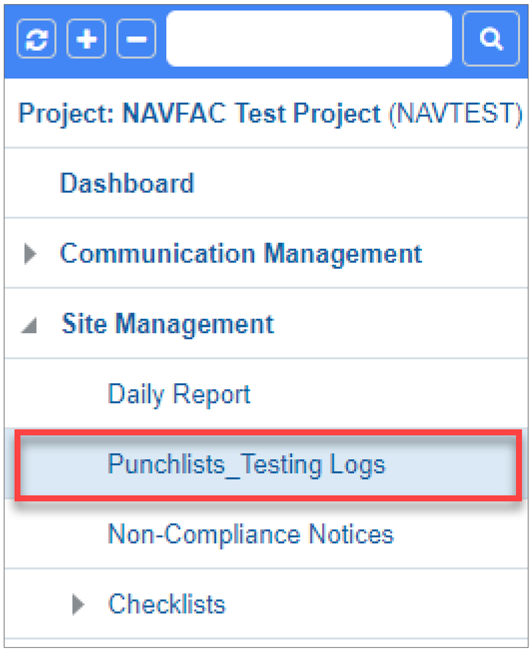
4.2.1.3 Copy Previous Reports

Once a daily report has been created, save time on future Daily Reports by clicking the Copy Previous Report button in the top, right of the screen. Once copied, just update changes that occurred and Submit. All information is copied over except for the Quality Control tab. However, this feature is being programmed and should be available in the future.

4.3. Punchlists and Testing Logs

4.3.1 Purpose

The **Punchlists and Testing Logs** allow KTRs to report any work that is incomplete or damaged near the end of a project. **Punchlists and Testing Logs** are in the **Navigation Pane** under the **Site Management** folder.



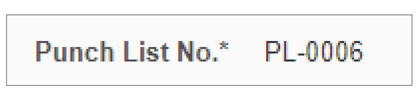
4.3.2 Adding a New Punchlist

Under **Site Management**, select **Punchlists_Testing Logs**. A list of existing Punchlists will display on the Punchlist Log.

On the upper right corner, click **Add Punchlist**.

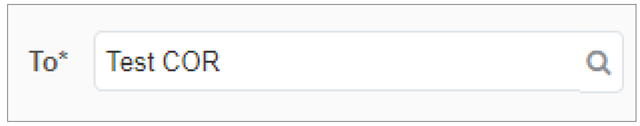
Fill in the required fields. Below is a short description of each field.

- <u>**Punchlist No.**</u>: This is the auto-generated number of the Punchlist.

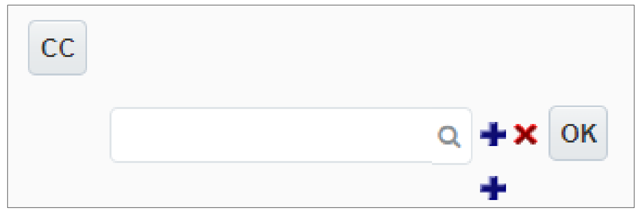


- **From**: This field indicates who sent the Punchlist.

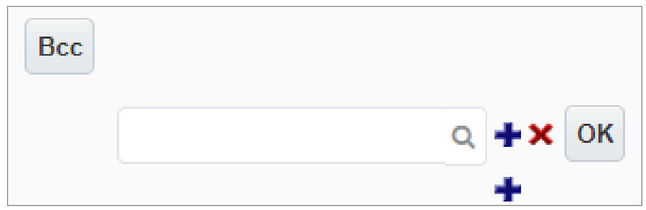
- **To**: Select the receiver of the Punchlist using the dropdown.



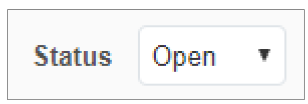
- **CC**: This can be used to add additional users that will need to see this Punchlist. They will not be able to respond.



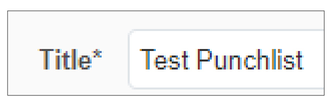
- **BCC**: Additional users can be added to the Punchlist. BCC users will not be able to respond, and their names will not be seen by other users.



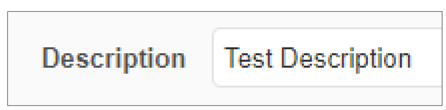
- **Status**: This field can be set to Open or Closed and refers to the overall Punchlist.

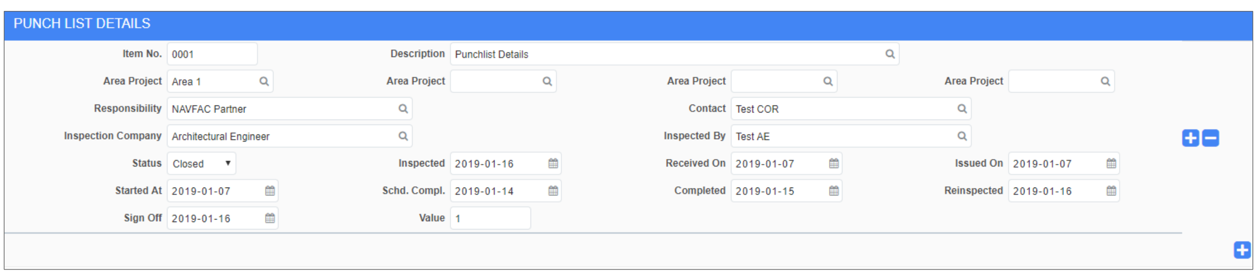


- **Title**: Create a title of the Punchlist.



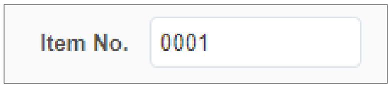
- **Description**: Write a short description of this Punchlist.



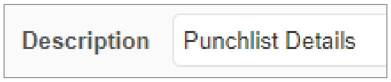


- **Blue Plus Sign**: This adds information of Punchlist Details. Multiple Punchlist Details can be added by clicking this button.

- **Item No.**: This refers to the number of the Punchlist Detail.

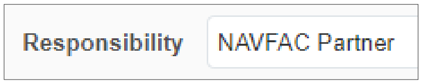


- **Description**: A short description of this part of the Punchlist Detail is provided here.

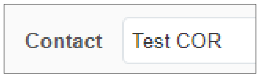


- **Area Project**: This is the physical area discussed in the Punchlist.

- **Responsibility**: A user will be a responsible for this Punchlist. This field indicates the user's company.



- **Contact**: The specific user that is responsible for this Punchlist.

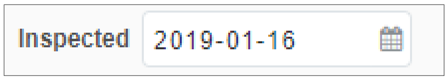


- **Inspection Company**: This is the inspector's company.

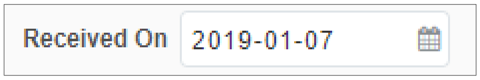
- **Inspected By**: The user who inspected this Punchlist.

- **Status**: This refers to the status of the individual Punchlist Detail. The status can be affected if other fields within the Punchlist Detail have been set.

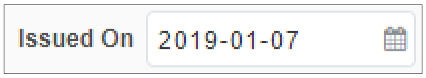
- **Inspected**: The date when Punchlist inspections occurred.



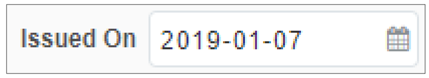
- **Received On**: This is the date of when the Punchlist was received.



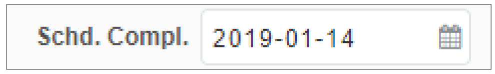
- **Issued On**: Date this part of the Punchlist was issued.



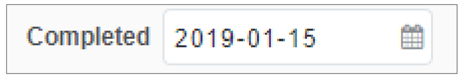
- **Started At**: Date when the Punchlist is worked on after inspection.



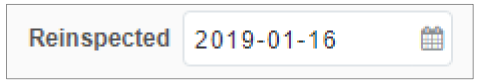
- **Schd Compl.**: This is the Schedule Complete date: the projected date when the Punchlist will be completed.



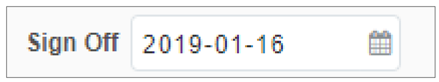
- **Completed**: The date the Punchlist was completed.



- **Reinspected**: The date the Punchlist was reinspected.



- **Sign Off**: The date the Punchlist was signed.



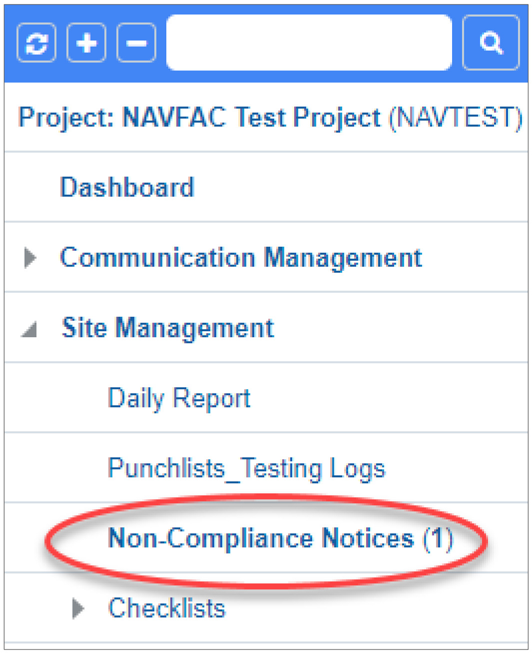
- **Value**: The value of the Punchlist after it has been reinspected and signed.

Once the **Punchlist** has been completed, select **Submit** in the upper-right hand corner.

Refer to ***Section 3.2.3 Attachments, Related Objects, and History*** to add any **Attachments** or **Related Objects** to the Punchlist.

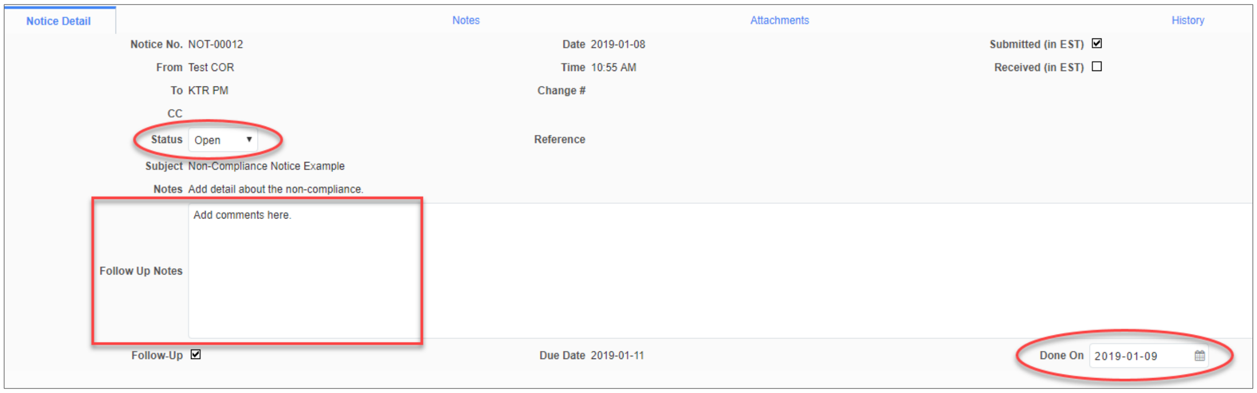
4.4. Non-Compliance Notices

Non-Compliance Notices can only be issued by NAVFAC. If you, the contractor, receives a non-compliance notice, you will see a bold number next to that field in the Navigation Pane upon logging into eCMS.



From the **Non-Compliance Notice** log, click on the bold notice at the top. This will open the Non-Compliance Notice from NAVFAC. Read all information. If there is a check mark next to the Notes or Attachments tab, check those tabs for additional information. To respond or add information, click the **Edit Notice** button in the top, right corner.

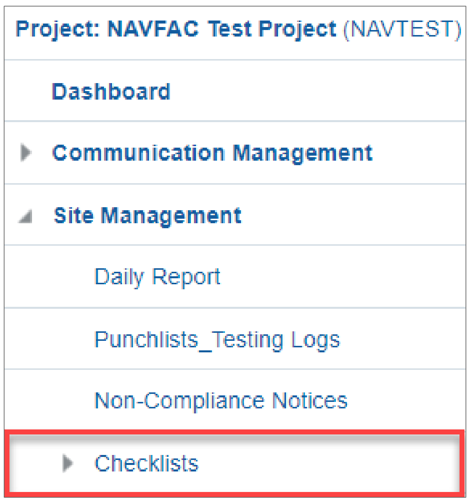
This will open the **Status** field. Select the status form the dropdown list. The **Follow-Up Notes** comment box and the **Done On** date will also be open for editing. Use the calendar icon to select a date when completed.



You may also add additional **Notes** or **Attachments** using the tabs at the top. Once complete, click **Save** in the top, right corner.

4.5. Checklists

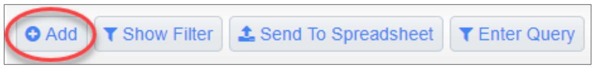
Checklists are used for inspection and to keep the project on track. To locate **Checklists**, select the **Site Management** folder.



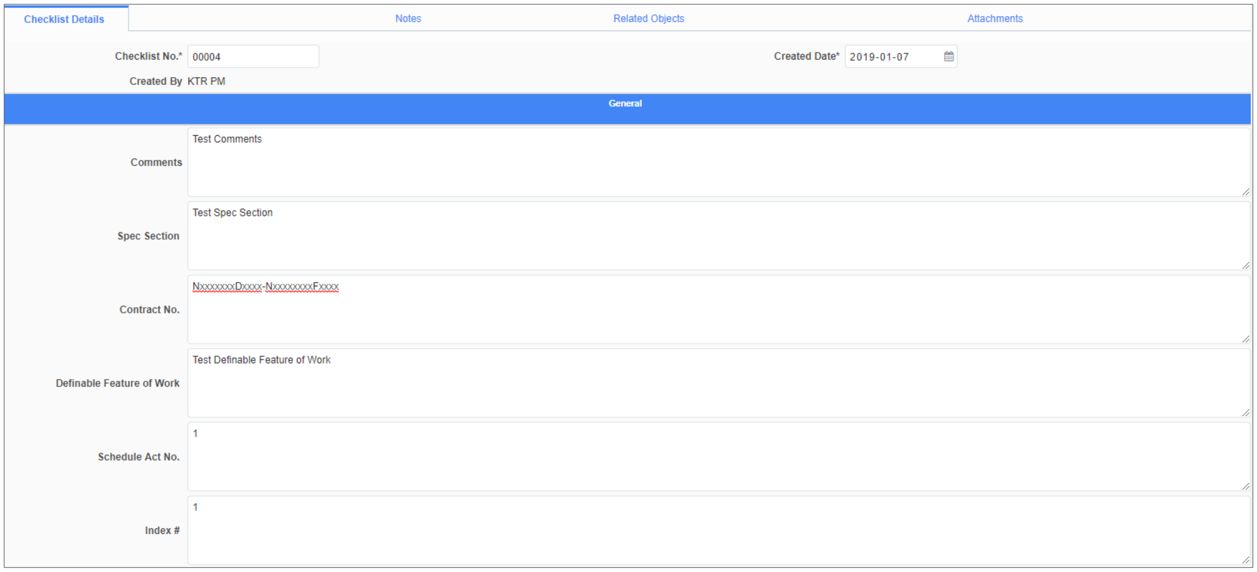
Then, click **Checklists**. The following are the **Checklists** that are currently available.

4.5.1 Adding a New Checklist

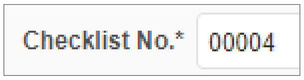
Under **Site Management** and **Checklists**, select one of the Checklists. The **KTR_QC Preparatory Phase** will be used in this example. Select **Add** on the upper-right corner.



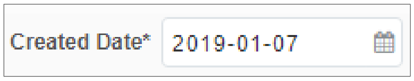
Fill in the required fields of the upper half of the Checklist. A short description of the top fields is provided below.



- **Checklist No.**: An auto-generated number for this specific Checklist

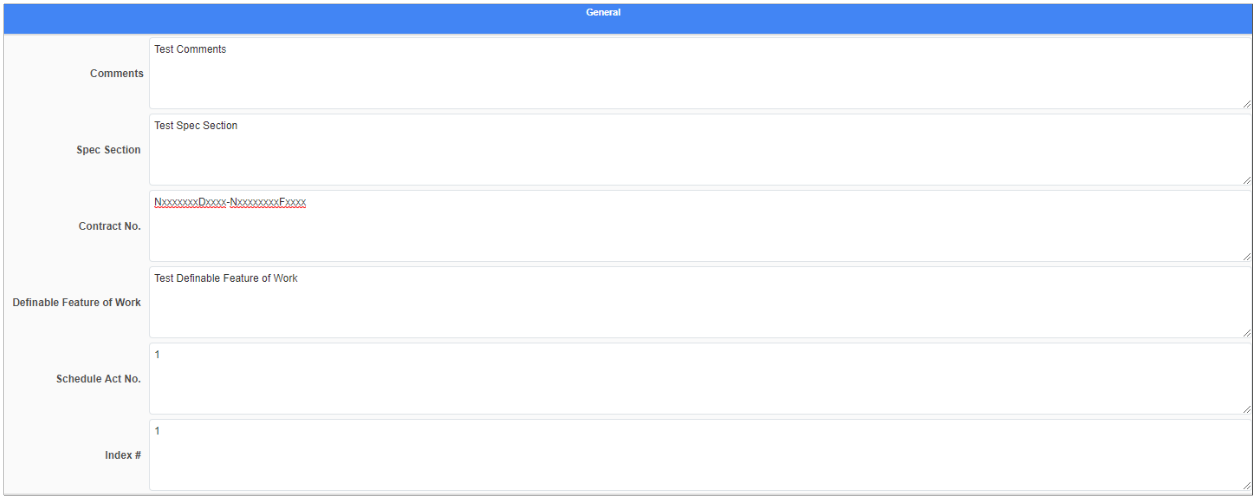


- **Created Date**: The date the Checklist was created

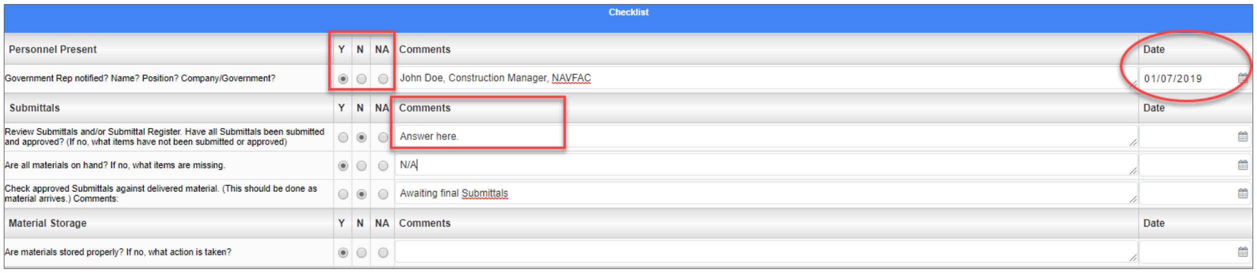


- **Created By**: Indicates the user who created the Checklist

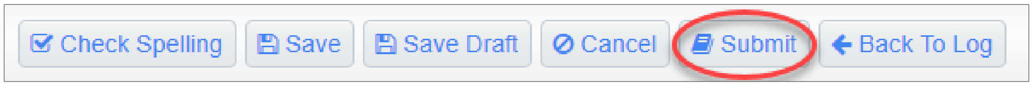
The **General** section varies between Checklists. There will be up to six comment boxes that allow for open answer responses. Each comment box can hold 4,000 characters.



The final part of all of the checklists are the questions. Each question is accompanied by a **Y** for Yes, **N** for No, or **NA** for Not Applicable. Select the answer that best matches the question asked. Then add any additional information in the **Comment** box provided. Type the **Date** when relevant.



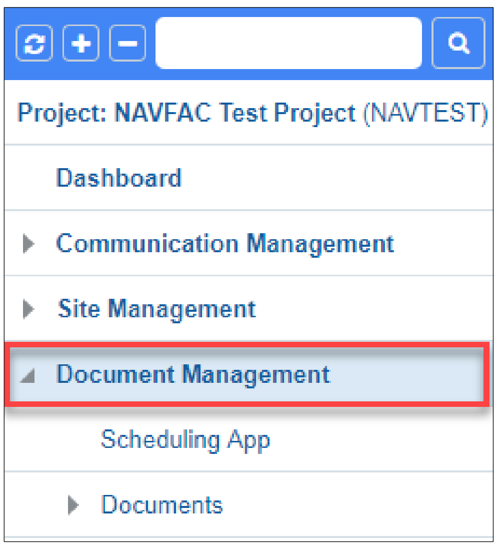
All checklists should be similar to existing forms that you are familiar using. Complete all pertinent information and then select **Submit** in the top, right corner of the screen.



5. DOCUMENT MANAGEMENT

5.1. Background

The Document Management section of eCMS is located in the **Navigation Pane** on the left side of the screen.



This section consists of the **Schedule App**, where schedules can be created from scratch or Primavera and MS Project schedules can be imported or exported. Primavera files can also be uploaded in the Document Attachments.

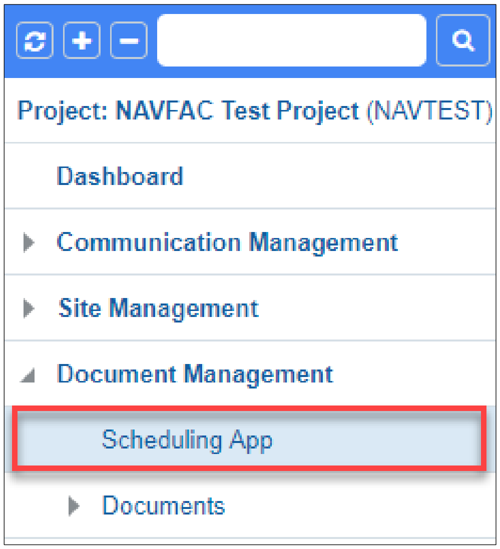
This section also includes **Documents**.

5.2. Restrictions on Document Upload

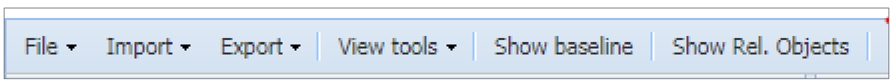
A user can upload as many files as needed However, the size limit of files per batch upload is 200 MBs.

5.3. Schedule App

In the **Navigation Pane** on the left side of the screen, open the **Document Management** folder and select the **Schedule App.** If any baseline schedules have been uploaded, they will appear here.

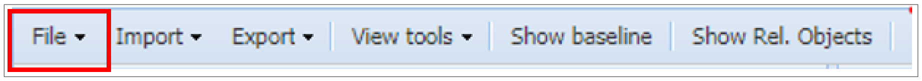


At the top of the schedule screen, several tabs appear. Use these to create a schedule or import an existing schedule.



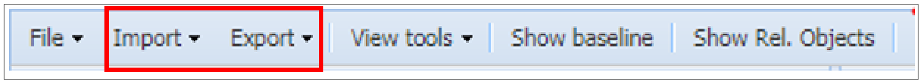
On the right side of the same bar, the **Project Calendar** displays the **Schedule**. With the dropdown, adjust the settings to only see critical path milestones, cascade changes, or view only tasks that are less than 30% complete. Users can also use the search bar to search for specific activities.

5.3.1 Files

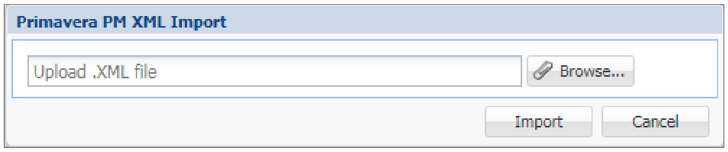


Using the dropdown menu on the **File** section of the tool bar, you can choose to **Save** the schedule created, **Approve** the baseline schedule for the project, Refresh the tasks, or Print the schedule to PDF.

5.3.2 Import/Export Schedules



To import a schedule from CSV, Primavera, or MS Project, select the **Import** dropdown. Select the file type. A popup will appear for the **Import**.



Click the **Browse** button to find the file on your computer and select **Import** when done.

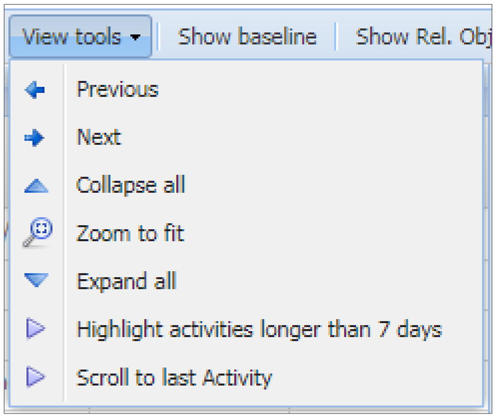
To **Export**, select the dropdown next to the **Export** button on the tool bar. Select the file type to **Export**. This will automatically download the file to the desktop.

NOTE: If the user does not have Primavera or MS Project installed on their computer, these file types will not work.

5.3.3 Tools

Select the dropdown next to **View Tools** on the tool bar.

Use these tools to navigate the **Activities** and **Tasks** in the schedule. The **Previous** and **Next** buttons will move the viewer back and forth between tasks.



Collapse All will collapse all tasks so that the user is only viewing the **Activities** folders.

Activities

Activity Name	Start	Finish
P-100 BLDG/TSB-2/SAEP/SITE	08-20-2014	04-08-2018
P-100 PIER WORK LESS MECH/	08-20-2014	09-26-2017
P-100 MECH/ELEC ON PIER	08-20-2014	08-17-2017
P-100 SITE IMPROVEMENTS	08-20-2014	06-14-2016
P-100 TSB-2 UPGRADED DOOR	08-20-2014	06-14-2016
OPTION 1: P-099 BLDG/TSB-2A	08-20-2014	02-08-2017
OPTION 2: P-099 IX-516 MOOR	08-20-2014	09-01-2016
OPTION 3: P-099 TSB-2A UPGR	08-20-2014	08-20-2014
OPTION 4: P-099 DEMO & REM	08-20-2014	08-20-2014
OPTION 5: P-100 ESS & IDS SY	08-20-2014	08-20-2014
OPTION 6: P-099 ESS & IDS SY	08-20-2014	08-20-2014
P-100 FF&E TSB-1 & TSB-2	08-20-2014	08-20-2014
P-099 FF&E TSB-2A	08-20-2014	06-27-2016

Zoom to Fit will format the schedule to appear on one screen. For larger schedules, this may be difficult to read.

Expand All will display all tasks in the **Activities** folders.

Activities

Activity Name	Start	Finish
P-100 BLDG/TSB-2/SAEP/SITE	08-20-2014	04-08-2018
Test	11-19-2014	11-19-2014
Mobilization	01-12-2015	01-16-2015
Develop Offsite Parking	03-03-2015	03-23-2015
Install Erosion Control/Silt Fe	02-20-2015	03-02-2015
Clearing & Grubbing Sequen	03-03-2015	03-23-2015
Earthwork Sequence 1	03-10-2015	04-03-2015
Storm Drainage Parking Lot	03-23-2015	04-13-2015

Use the **Highlight Activities Longer than 7 Days** button to see what tasks need extra attention.

The **Scroll to Last Activity** button will take the user to the last activity in the schedule.

5.3.4 Baselines

Select the **Show Baseline** button to show the baseline schedule of the project.

5.3.5 Related Objects

Select the **Show Related Objects** button to see if any **Communications, Internal Routing** tasks, **RFIs, Submittals**, or other documentation are attached to the schedule.

5.3.6 Show Schedule

Select the **Show Schedule** button in the right corner of the **Schedule** page to show a high-level view of the schedule.

5.4. Documents

The Documents dropdown opens a list of available folders for use on your project. Use these folders to organize attachments. Files can be uploaded directly to a folder or attached using the Attachments function of an RFI, Submittal, Communication, Issue, or other applications in the system. Find the Documents folder in the **Navigation Pane** under **Document Management.** Your Documents folders may vary from the picture below.

- Documents
  - Base Specific
  - Claims - REA
  - Closeout - BOD, Warranty, As-Builts
  - Commissioning - Plan/Report
  - Contract Drawings - Native Drawing, PDF
  - Contract Items - Bonds, Ins., Award Docs
  - Contract Specs. - Amendments
  - Correspondence - KTR, NAVFAC, AE
  - Daily Reports - Production, QC, Prep
  - Government Furnished Equipment
  - Invoice Documentation
  - Meeting Minutes - PAK, Pre-con
  - Modifications - RFPs
  - Other
  - Photos - Progress by date
  - Quality - Performance Assessment, DR
  - RFI - Attachments
  - Reports - Test Plan/Log and Reports
  - Safety-Env. - APP, AHA
  - Schedules - PDF, Native
  - Submittal - shop drawings

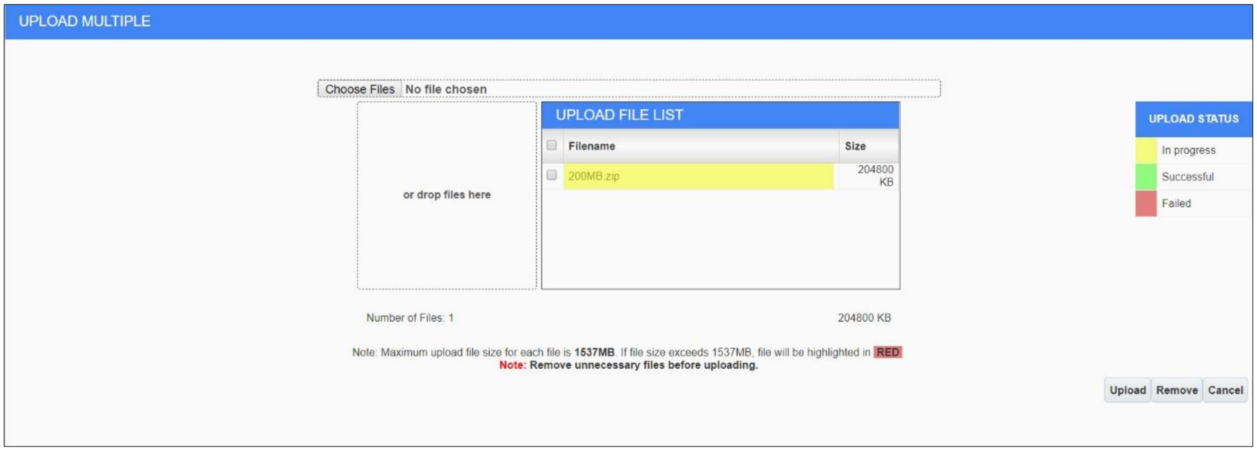
5.4.1 Uploading Attachments

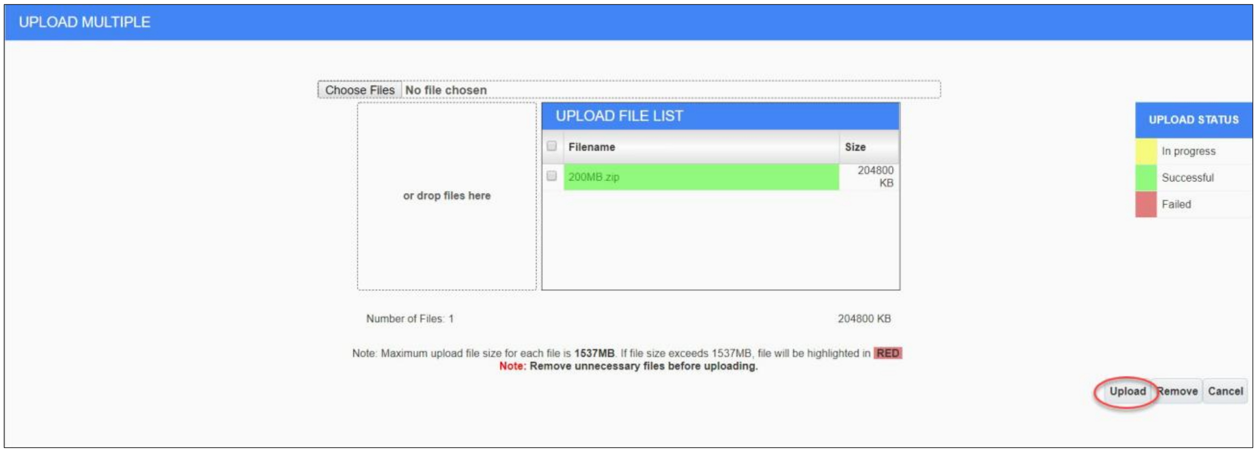
5.4.1.1 Uploading Attachment to an RFI, Submittal, and other records

To attach an attachment, the record must first be saved as a draft or submitted. Once this is done, navigate to the **Attachments** tab.

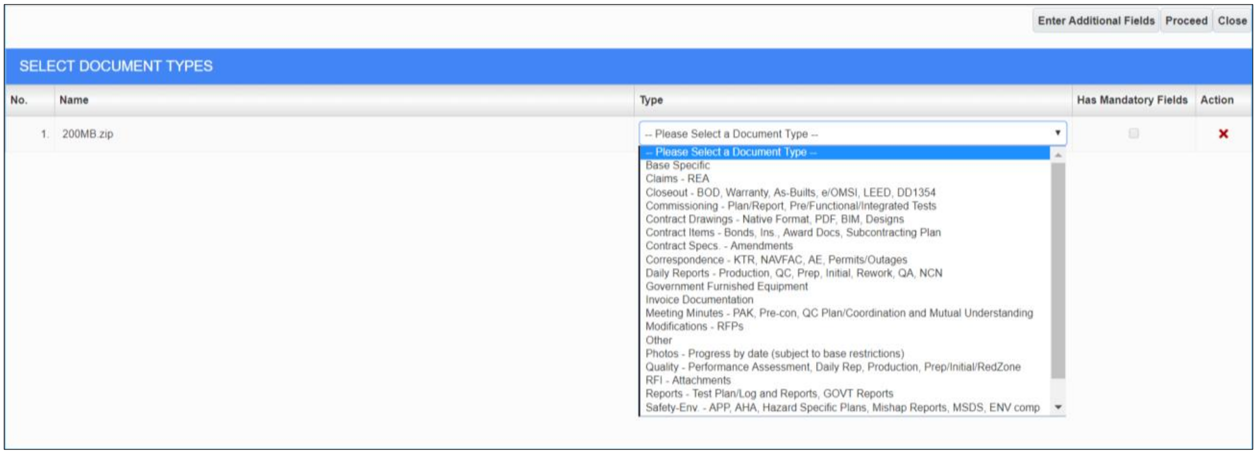
Select **Upload Multiple** on the upper-right corner.

Select the files to upload or drag and drop them on the screen. The bar will turn yellow. Wait for the bar to turn green as shown below. Then, click **Upload.** Please disregard the note as it may display an incorrect maximum file size. The maximum file size per batch upload is 200 MBs.





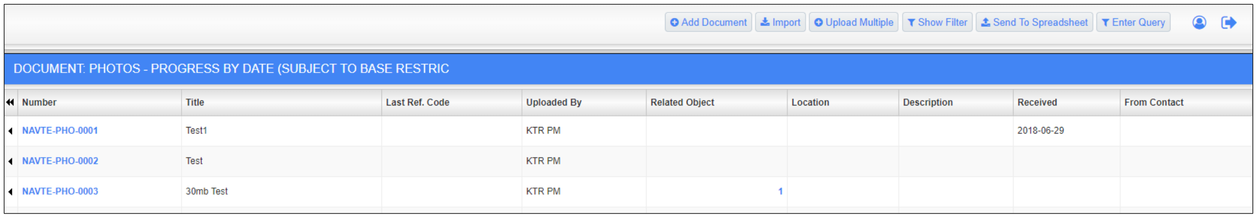
A new screen will appear asking for more information about the files. Use the dropdown menu under **Type** to show the type of file and document folder where this attachment will be placed. Once the **Type** has been selected, click the **Enter Additional Fields** button if you want to add more details, or click **Proceed** to upload.



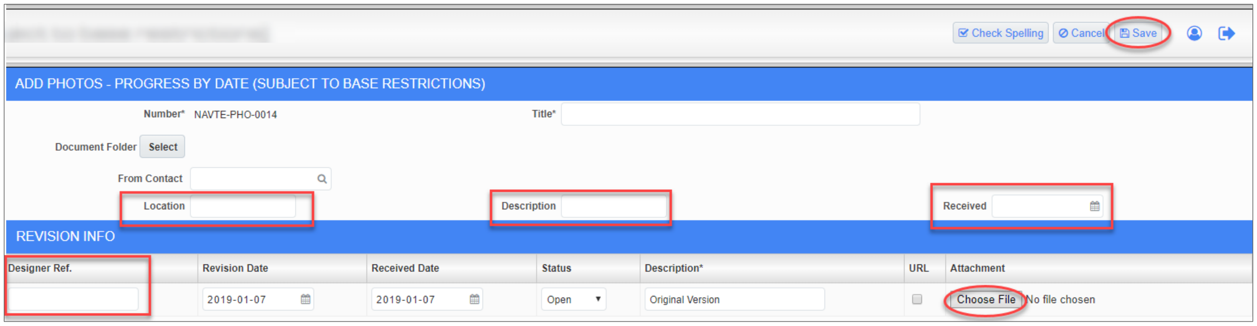
There will now be a checkmark next to the **Attachments** tab indicating that there is an attachment.

5.4.1.2 Uploading Attachments to a Document Folder

Choose the folder to add an attachment. Then select **Add Document** from the top, right bar to add a single file or **Upload Multiple** to add several attachments at once.



A screen will appear to upload attachments. Click **Choose File** from the **Attachment** box. When a user uploads a file, the **Title** will automatically generate.



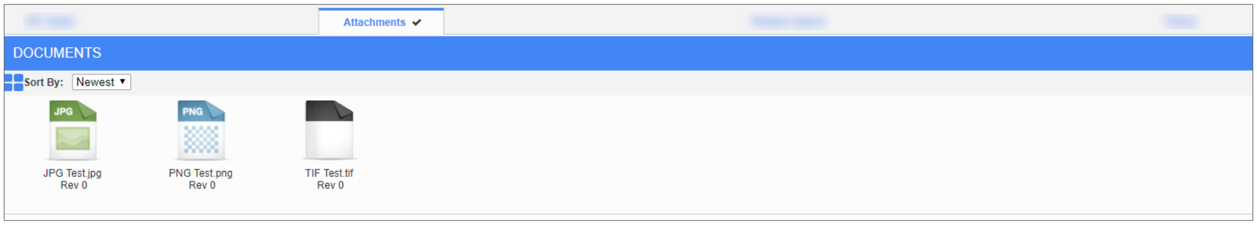
Complete the boxes to add additional information about the attachment such as the location, description, and date. Enter drawing numbers under the **Designer Ref.** box. After uploading, select **Save** in the top, right of the screen.

5.4.2 Downloading Attachments

5.4.2.1 Downloading Attachment from an RFI, Submittal, and other records

To download an attachment from a record, navigate to the **Attachments** tab.

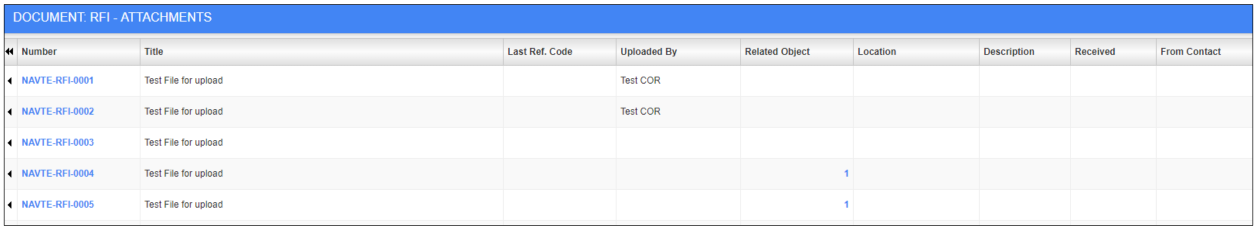
This tab displays all attachments currently attached to the record. For this example, there are three attachments.



Right-click on the attachment that you want to download. Depending on the browser used, select “Save link as…” or “Save target as…” to download the file.

5.4.2.2 Downloading Attachments from a Document Folder

Choose the Documents folder the attachment is located. **RFI – Attachments** will be used for this example. Locate the attachment you want to download. Click the hyperlink in the **Number** column to view.



Right-click the hyperlink under the **Attachment** column. Depending on the browser used, select “Save link as…” or “Save target as…” to download the file.