eCMS Processes and Procedures NAVFAC Users

Updated July 2020

Prepared By CMiC

Cover Photo

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

Table of Contents

Updates

Date	Version	Summary of Change
July 2017	1.0	First complete draft released
July 17, 2017	1.2	Added Appendix for Advanced Users; Updated process of including multiple SMEs
August 1, 2017	1.3	Updated Section 3.2.2.3 to select the Edit button if Add CC is not visible. Updated Section 1.2.2 to include the link to login to eCMS
August 8, 2017	1.4	Added Section 1.4;
December 2017	2	Updated screenshots to match new system look and feel Incorporated process changes and updates into documentation
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; Added sections to Non-Compliance Notices
July 2020	4.2	Updated screenshots and content to reflect current functionality of software.

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 NAVFAC 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

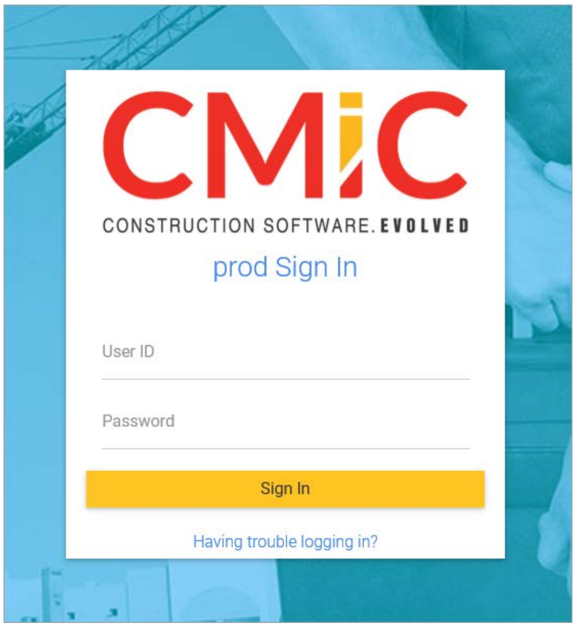
Different users will have different permissions and responsibilities within the eCMS System. NAVFAC Users and Contractors will have different screens. NAVFAC will have active users and passive users. Active Users are actively working on the project. Passive Users will have read- only access.

1.2.2 Logging In

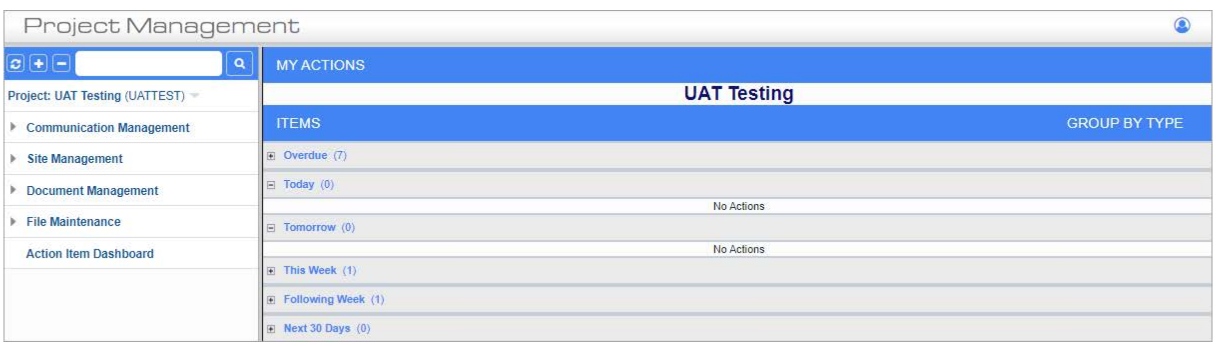
For project team members that do not yet have access to eCMS, the GOV Contracting Officer's Representative (COR) or Construction Manager (CM) must request access through the use of the Project Access Request Form found on the internal NAVFAC Portal.

The minimum information required is First Name, Last Name, E-Mail Address, Project Role, 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 all users 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.

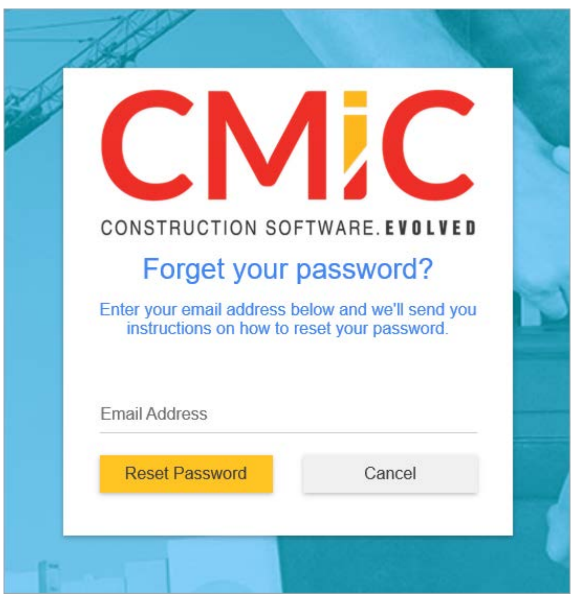


1.2.2.1 Changing Password

Upon first login, please change your password immediately. To do this, please refer to *Section 1.2.2.2 System Contact Info*.

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

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



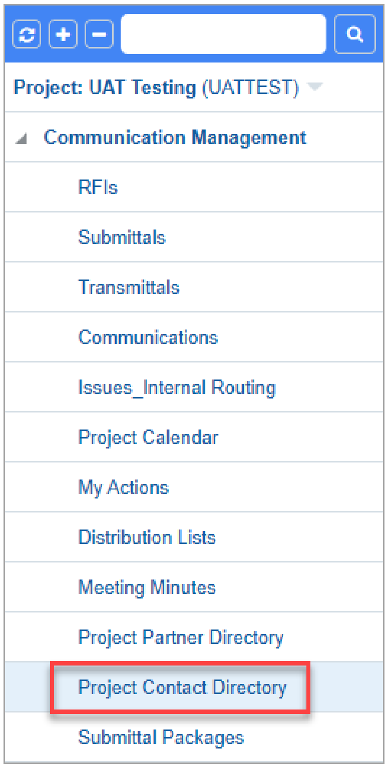
You will receive an e-mail from accounts@cmic.ca with the link to change your password. Click on the link, enter your User ID and new password and click on [**Change Password**] button.

The DOD password standards are as follows:

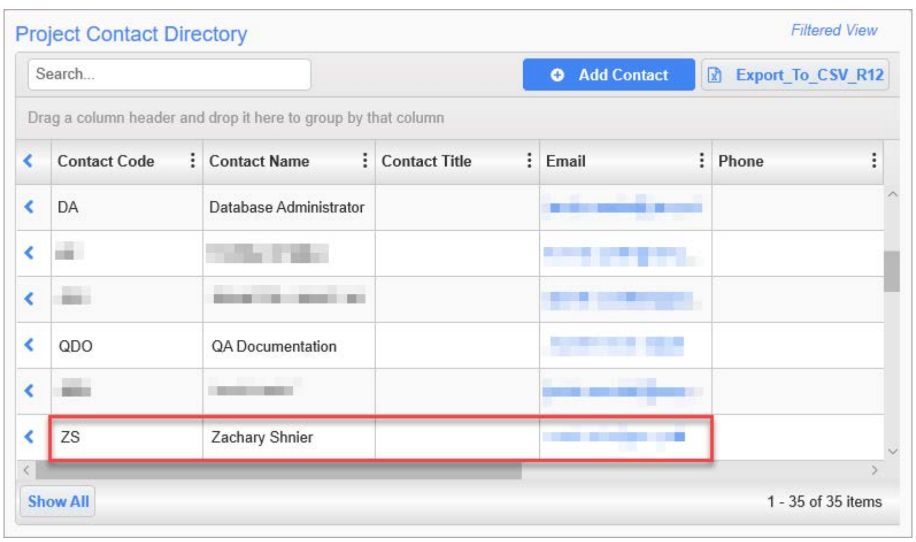
- Must be at least 14 characters in length.
- Must contain at least:
  - Two uppercase letters [A-Z]
  - Two lowercase letters [a-z]
  - Two digits [0-9]
  - Two special characters [e.g.: !@#$&*]
- A new password should differ from the changed password by at least 4 characters.
- A password cannot contain 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.

1.2.2.2 System Contact Info

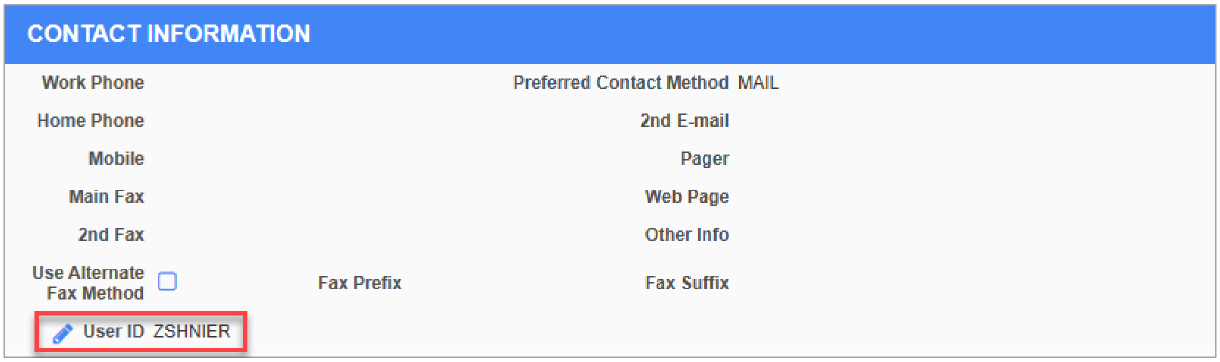
Each user will have an individual profile created prior to their first login to eCMS. To change your password, go to the Navigation Pane on the left column of the screen and open the Communication Management folder (If you do not see this folder, please refer to *Section 1.3.1 Navigation Pane*). Click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

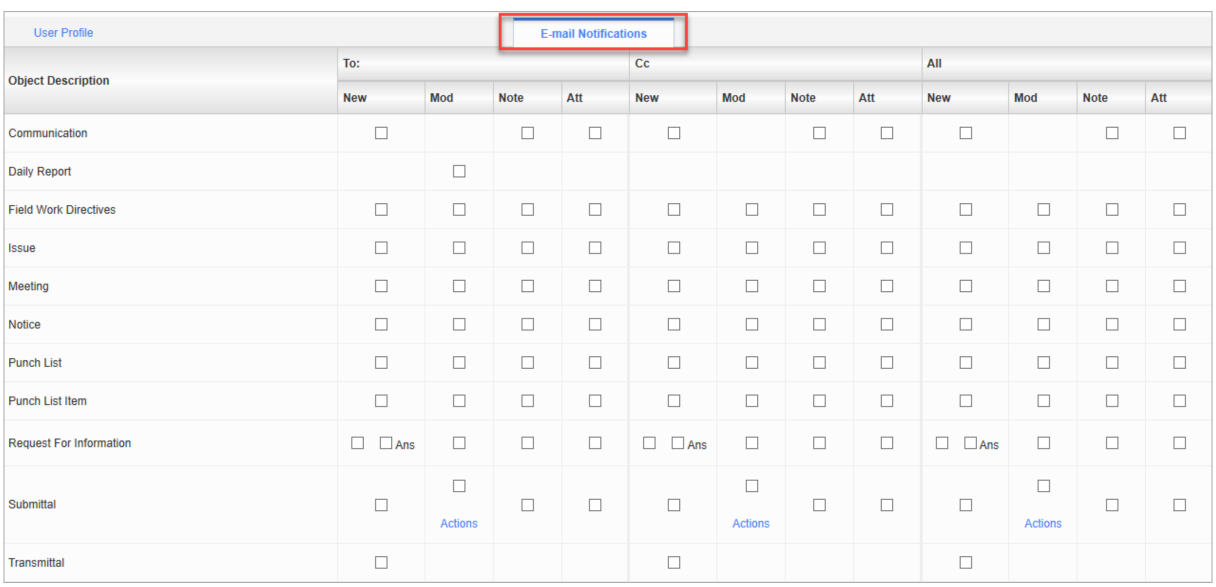


A pop-up box will open with the option to change the password. Click on the pencil icon next to the Password field. Change and confirm your new password and click the [**Save**] button.

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**].

1.2.2.3 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.

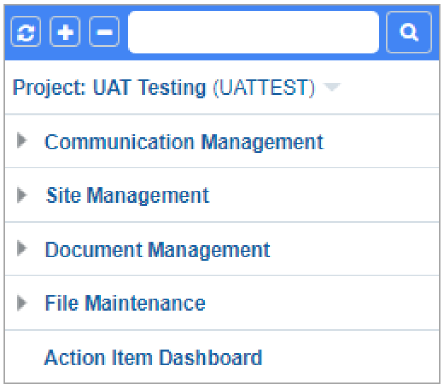
If you want to always receive an e-mail notification when a Punchlist is sent to you in eCMS, check the box in the column labeled New under the To heading. You would check the 'Mod' box to receive an e-mail every time a modification is made to Punchlists submitted to you. You would check the 'Note' box 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	☑	☑	☑	☑
Punch List Item	☐	☐	☐	☐
Request For Information	☐ ☐ Ans	☐	☐	☐
Submittal	☐	☐ Actions	☐	☐
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

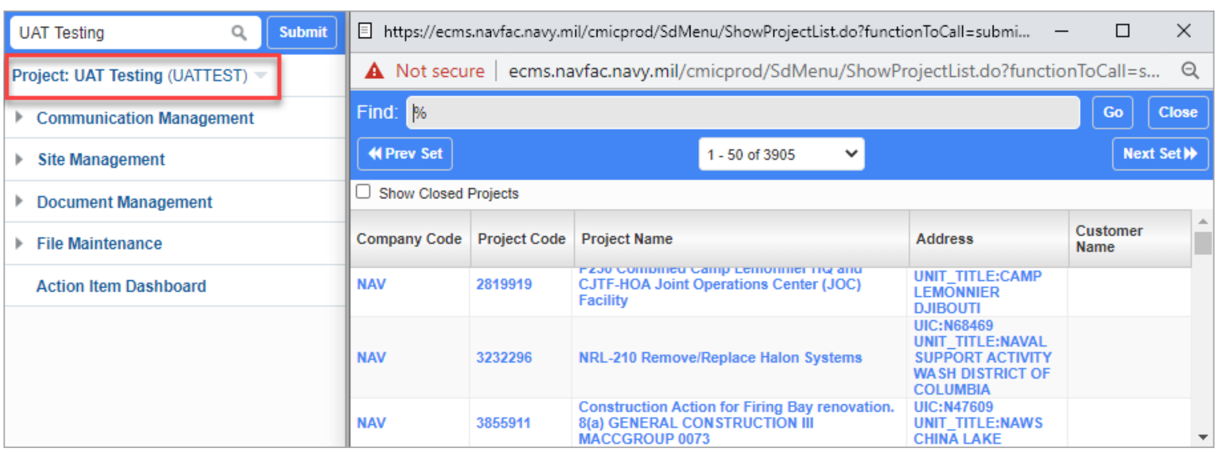


The Navigation Pane or Treeview is found on the far left of the screen. The folder structure may vary from project to project.

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 drop-down menu with the last 10 projects viewed by the user. Click the Search icon ( ) next to this list to open a pop-up of all projects the user is assigned to.

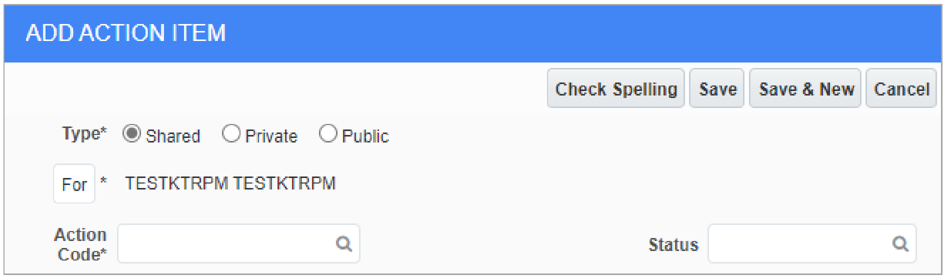
This will open a pop-up screen with a list of available projects to view.



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.



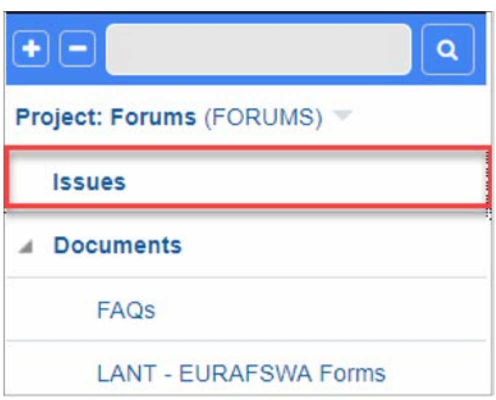
1.4 Technical Support and Feedback

For help with eCMS problems please contact the NAVFAC Information Technology Center (NITC) Help Desk at 805-982-2555 (DSN 551-2555) or email nitcoperationswatch@navy.mil.

This help desk is manned 24 hours a day, 7 days a week. This will create an STS Trouble Ticket that NITC can track. Please ask for Application Support/Other for eCMS. The ticket will then be directed to Jackie. She will either take on the ticket herself, pass db issues to the NITC DBAs or send the ticket to CMiC. The specific STS category for eCMS is coming in a day or so.

This trouble ticket workflow will provide visibility to NITC of any problems with eCMS, which can be coupled with our internal application monitoring system. Additionally, it helps us monitor requests going to the contractor.

If you have suggestions to improve the eCMS system, navigate to the Forums project and submit an Issue. This will be explained further below in 1.4.2.



1.4.1 Download Training Manuals

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

The newer version will require drilling down from "Document Management"

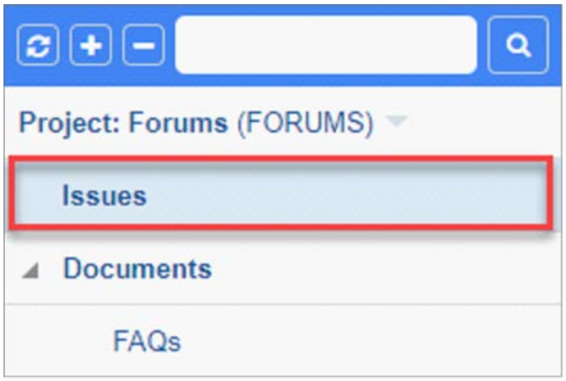
The newer version folder name has changed to REF eCMS Training Manuals

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

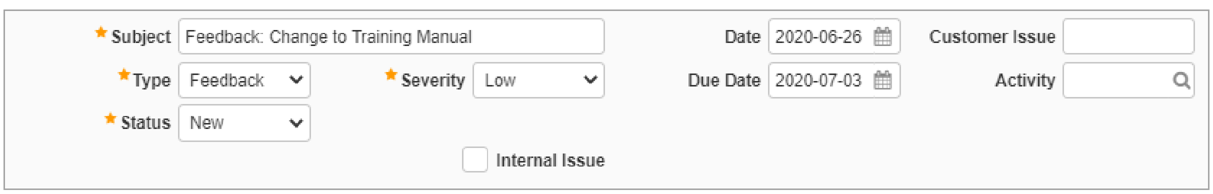
If you would like to offer feedback on either the system or the training manuals, use the Issues application in the Forums project.



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

The Issue Detail screen will open. The From field will already be completed. In the To field, 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 drop-down. 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 July 2020 and it is recommended that users clear their browser's history and cache to clear out the old system data from the browser. 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

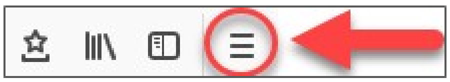
- Click on the Three-Dot menu at the upper right corner.

- 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

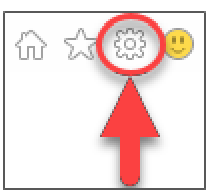
- Click on the Hamburger menu at the upper right corner.



- 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

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?

- For help with eCMS problems please contact the NAVFAC Information Technology Center (NITC) Help Desk at 805-982-2555 (DSN 551-2555) or email nitcoperationswatch@navy.mil.

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 1.2.2.1 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?

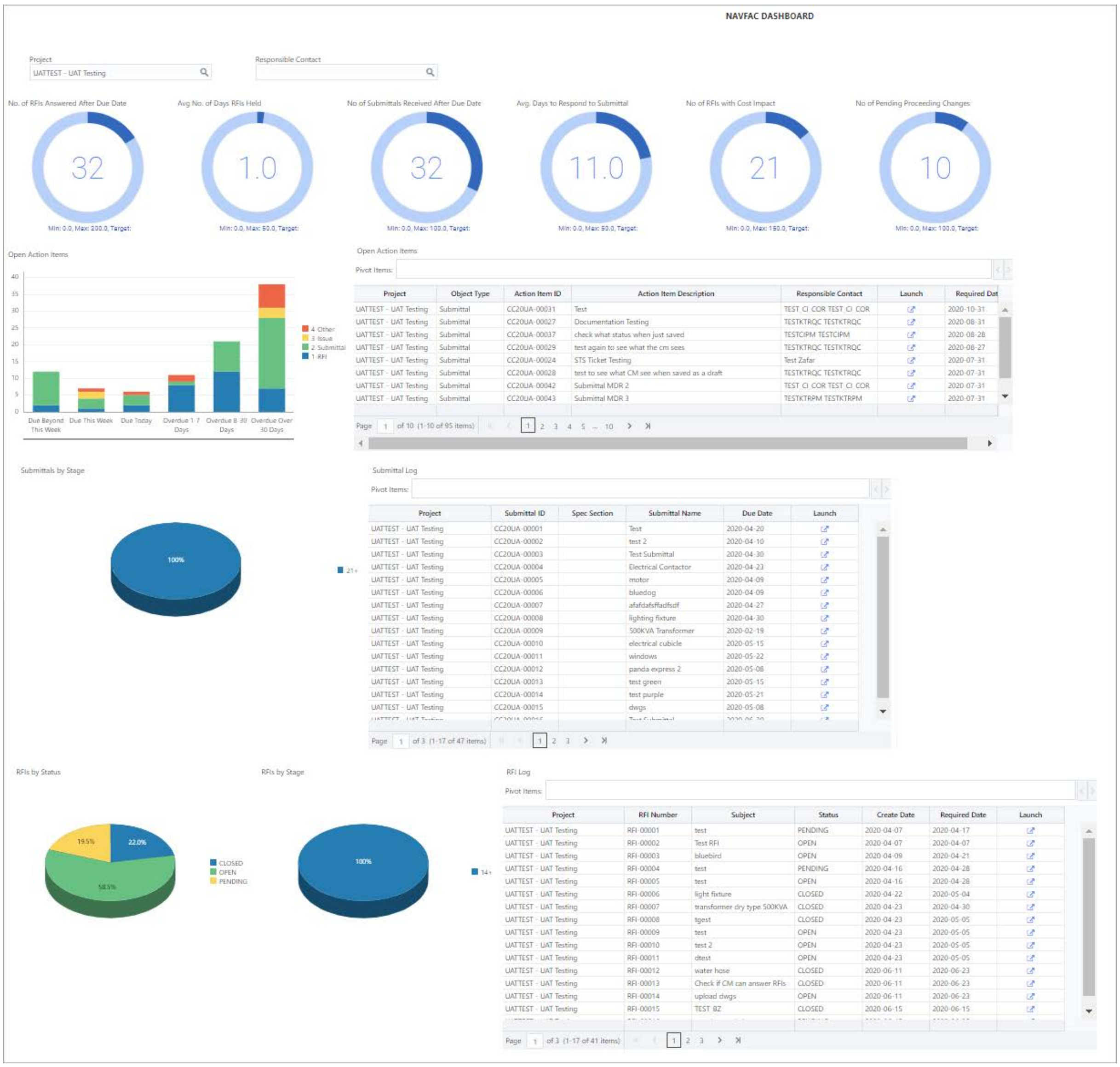
- No. Users <u>must not</u> upload any files that contain PII (Personally identifiable information).

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

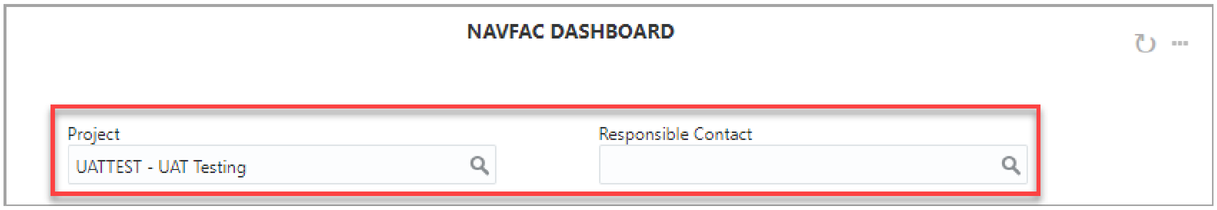
- To navigate to your eCMS projects, refer to *Section 1.3.1 Navigation Pane*.

2 Dashboards and Reporting

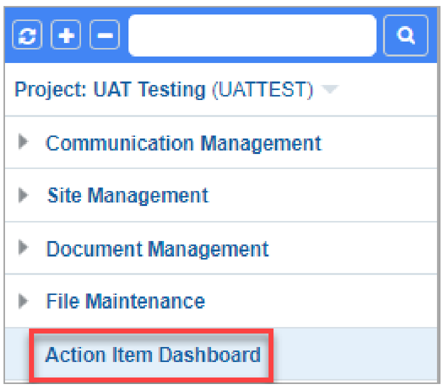
The Action Item Dashboard, displayed below, is the default landing page and can be accessed by all users. This dashboard displays a variety of interactive gauges, charts and tables that use real-time data directly from a user's eCMS system. The dashboard visualizations can be used to monitor and track performance and progress of a project's RFIs, Submittals, and Action Items.



If you navigate to another assigned project, the dashboard will update to reflect the outstanding RFIs and Submittals of the newly navigated project. The Project field and the Responsible Contact field can also be used to filter the data by project or responsible contact.



If the Action Item Dashboard does not load properly, please click Action Item Dashboard on the treeview.



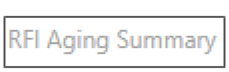
2.1 RFI and Submittal Bar Graphs

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.



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 see details about a specific metric, click its corresponding bar on the graph.

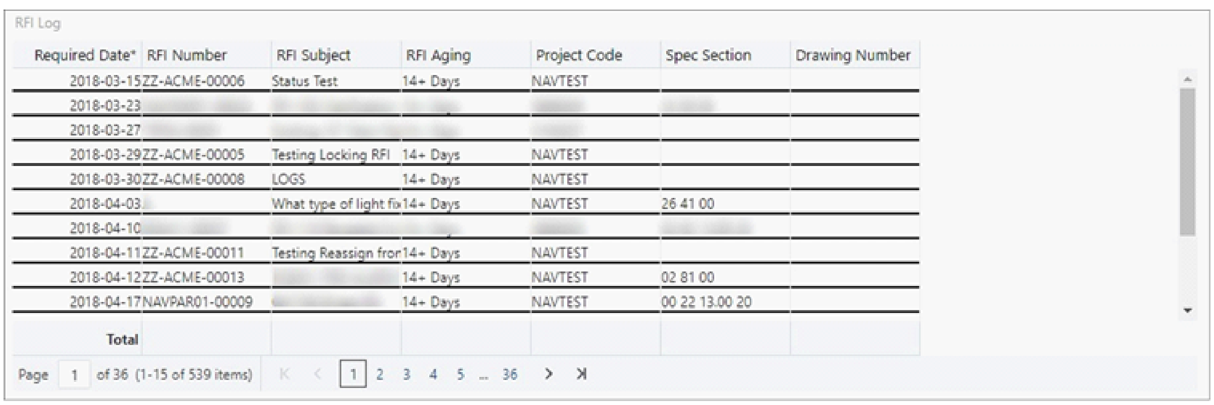
Both the bar graph and log will update to show only the information for that bar. To navigate back to the dashboard, click the Back button on the upper-right hand corner of the graph as shown in the picture.

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.

NOTE: 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.

RFI Log Columns



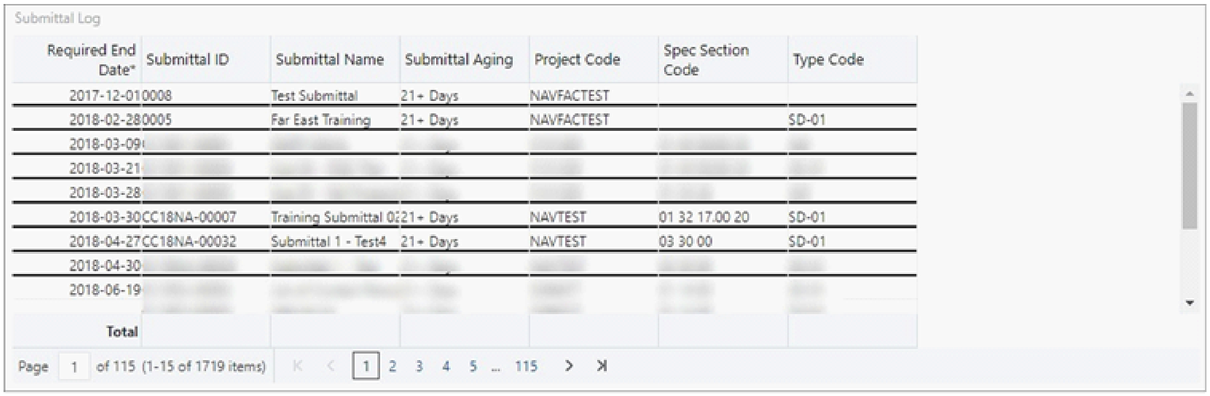
RFI Log

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		What type of light fi	14+ Days	NAVTEST	26 41 00	
2018-04-10	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
2018-04-11	ZZ-ACME-00011	Testing Reassign fror	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

- **Required Date**: The date of when the RFI is due
- **RFI Number**: The ID or number of the RFI
- **RFI Subject**: The title or subject of the RFI
- **RFI Aging**: The number of days since the RFI was created
- **Project Code**: The ACQR# of the project
- **Spec Section**: Displays the code of the Spec Section
- **Drawing Number**: Displays the Drawing Number of the RFI

Submittal Log Columns



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 0:	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

- **Required End Date**: The date of when the Submittal is due
- **Submittal ID**: The ID or number of the Submittal
- **Submittal Name**: The title or name of the Submittal
- **Submittal Aging**: The number of days since the Submittal was created
- **Project Code**: The ACQR# of the project
- **Spec Section Code**: Displays the code of the Spec Section
- **Type Code**: Displays the Submittal Type

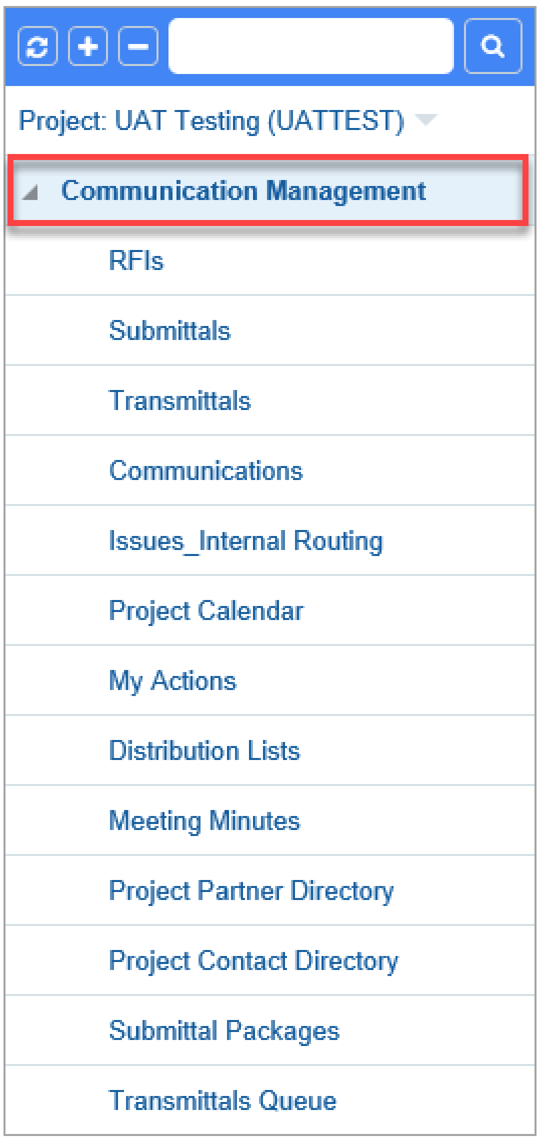
NAVFAC Naval Facilities Engineering Command

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:

- How to access RFIs and Submittals sent by KTRs to NAVFAC.
- Process for Responding to RFIs and Submittals.
- How to add attachments to a record.
- How to add a Reviewer(s) to an RFI or Submittal.
- 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) allow KTRs working on construction and facilities management projects to ask questions to NAVFAC and the Submittal application allows KTRs to submit required documents 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 to document the exact material and equipment the contractor intends to use during construction..

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

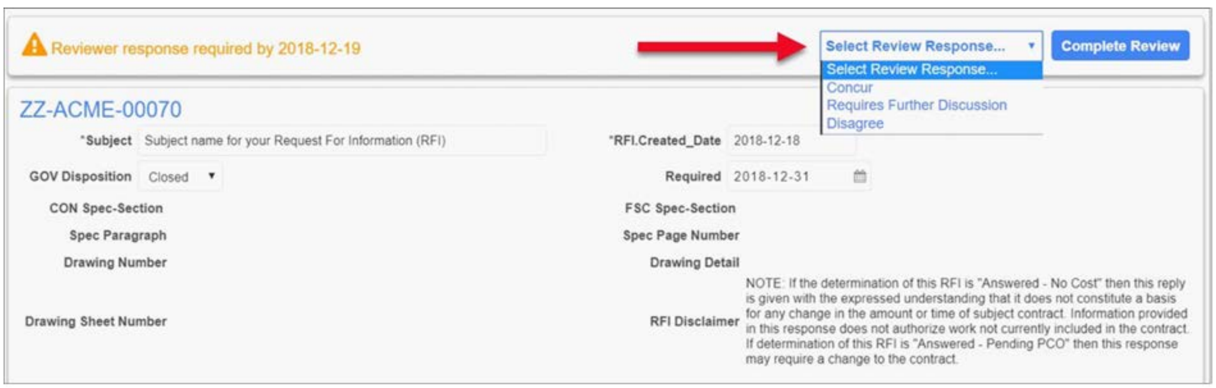
If you have used the system previously, you will notice that the detail screen for RFIs and Submittals are displayed differently. The screen is organized to display like a form. The basic information required has not changed. eCMS provides the ability to add Reviewers, facilitate Reviewer Response and use Notes to communicate efficiently.

A new Reviewers 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.

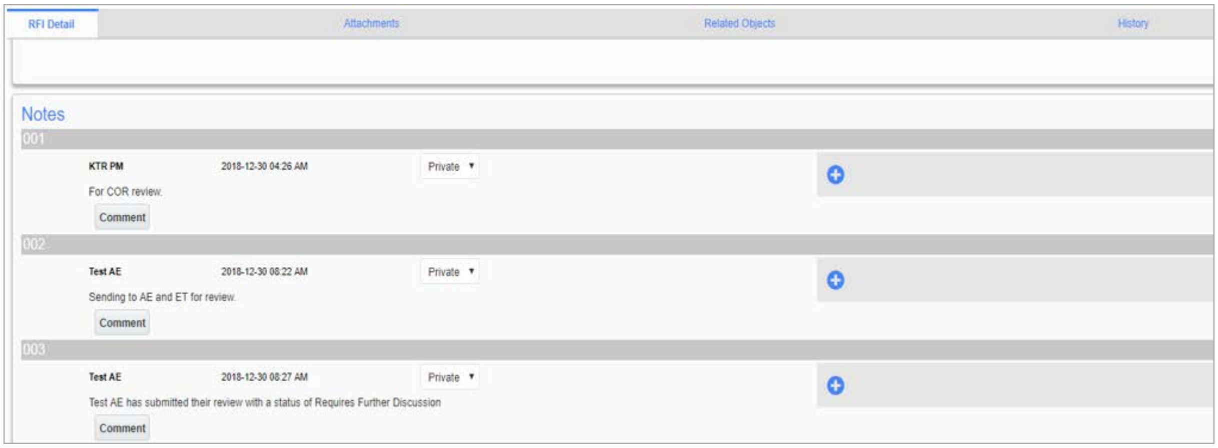
- RFIs – For RFIs, this means the Forwarding function is no longer required. Instead, the COR/CM navigates to the Reviewers section to add project SMEs for feedback. Reviewers can be added individually, or a distribution list can be used.
- Submittals – Issues/Internal Routing are no longer required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



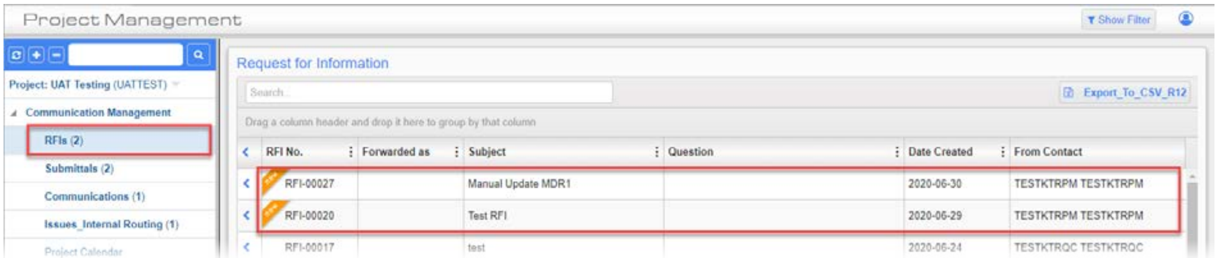
The software vendor continues to work on enhancements to further improve ease of use of the system. The user community will be notified of these changes as they occur. As you navigate through the system as a new user, you can request assistance through nitcoperationswatch@navy.mil or post an issue in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

3.2.2 RFI Process

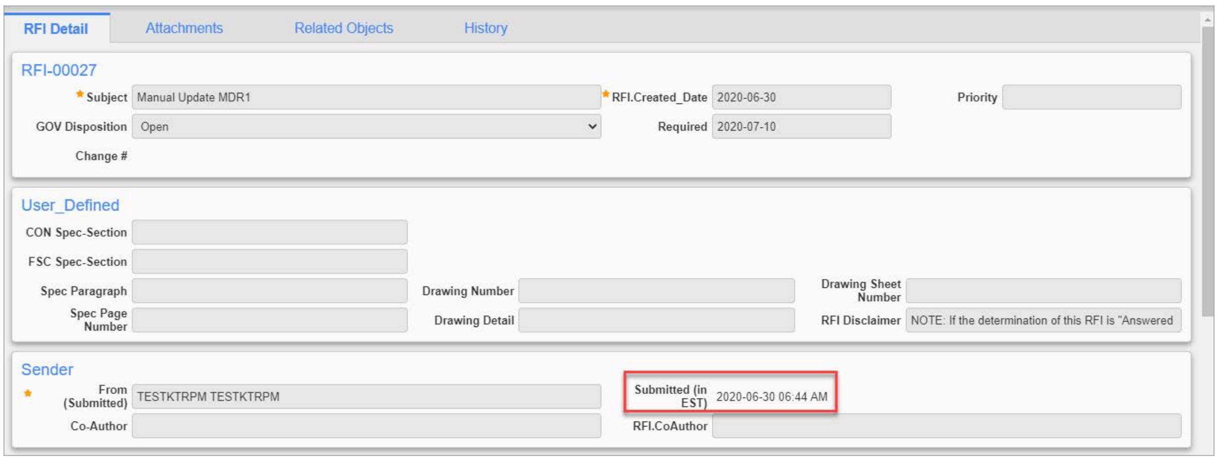
Using the navigation pane on the left side of your screen, click on Communication Management and then RFIs.

This opens the RFI log. All NAVFAC users can see all RFIs created for the project.

RFIs will be bolded with a number indicating that a new RFI(s) has been submitted for review.



In this case, the COR/CM has two (2) new RFIs to review. The RFIs can be opened by clicking the title listed on the navigation pane under RFIs or from the RFI log. The log lists the RFIs to be reviewed at the top of the list. Once the RFI is opened, the RFI Detail screen will display.



The date and time the RFI was submitted will be recorded in the Sender section of the RFI Detail screen, as shown in the screenshot above.

3.2.2.1 Responding to an RFI as the COR/CM

To respond to an RFI, navigate to the RFI Detail screen. Scroll down to the Notes section to view any notes the KTR may have added. The COR/CM can add a note here as well. The [**Save**] button saves and submits the note so that it can be viewed by the selected reviewers. Notes default to "Private" so that only NAVFAC users can see all notes.

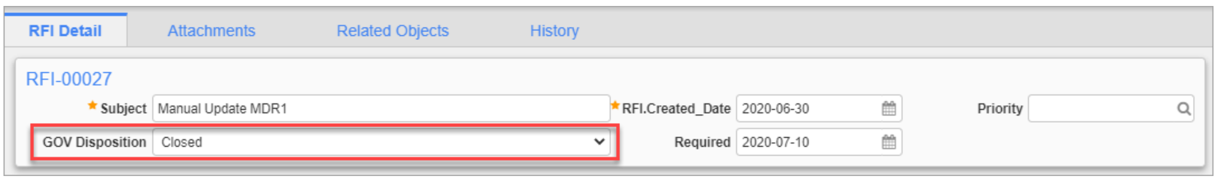
If the COR/CM wants the contractor to see a note, "Public" can be selected from the drop-down menu.

After reviewing the RFI, the COR can choose to respond directly to the RFI or request that the RFI by reviewed by project subject matter experts (SMEs).

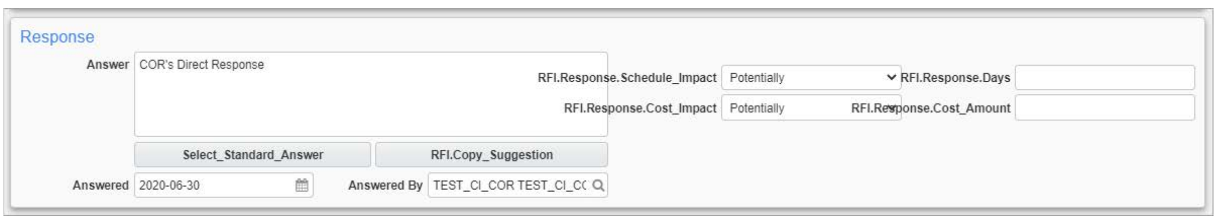
3.2.2.2 *Responding Directly to RFIs*

To respond directly to an RFI, click [**Edit**] from the menu at the top of the screen.

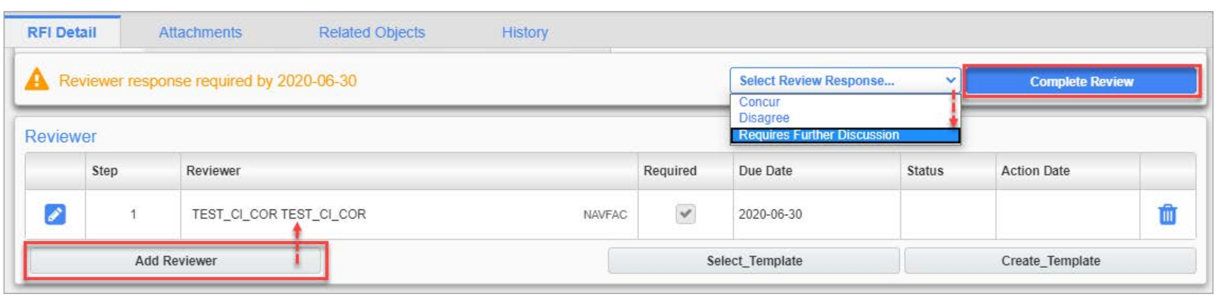
In the GOV Disposition field, click on "Closed" in the drop-down menu.



Scroll down to the Response section and type the response in the Answer box.



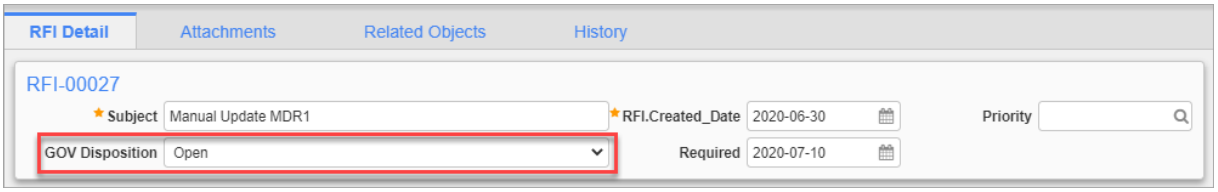
Click on the [**Add Reviewer**] button to add the COR as a reviewer. Next, the user has the option to press the [**Select Review Response**] to select a review response from the drop-down menu, if desired. Then click on the [**Complete Review**] button.

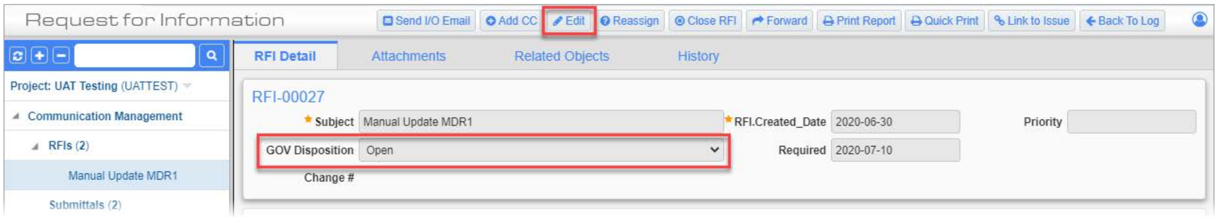


If no changes are needed for a Proposed Solution, simply click the [**Submit**] button at the top, right corner of the screen. The RFI will show as processed and the KTR will be notified of the decision.

3.2.2.3 *Adding Reviewers to RFIs*

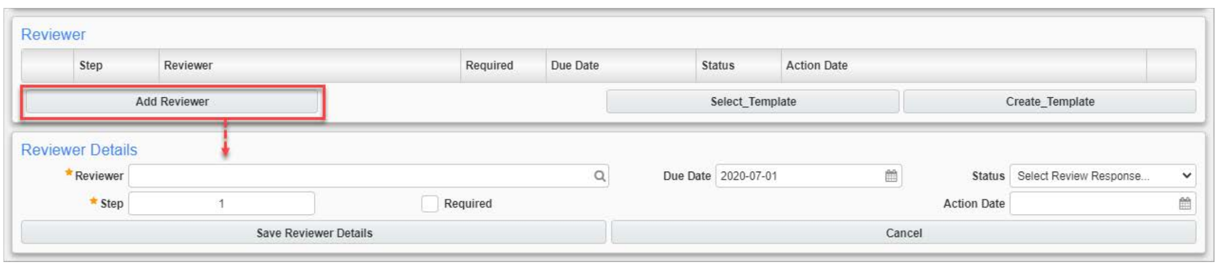
If the COR decides additional review is required, the GOV Disposition must be set to "Open".



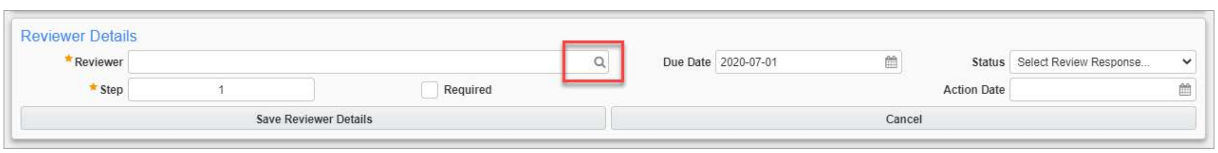


If it is not, click on the [**Edit**] button at the top of the RFI screen and select “Open” from the GOV Disposition field’s drop-down menu.

While in edit mode, reviewers can be added individually from a list of Project Contacts or a slate of reviewers can be added using a Distribution List.

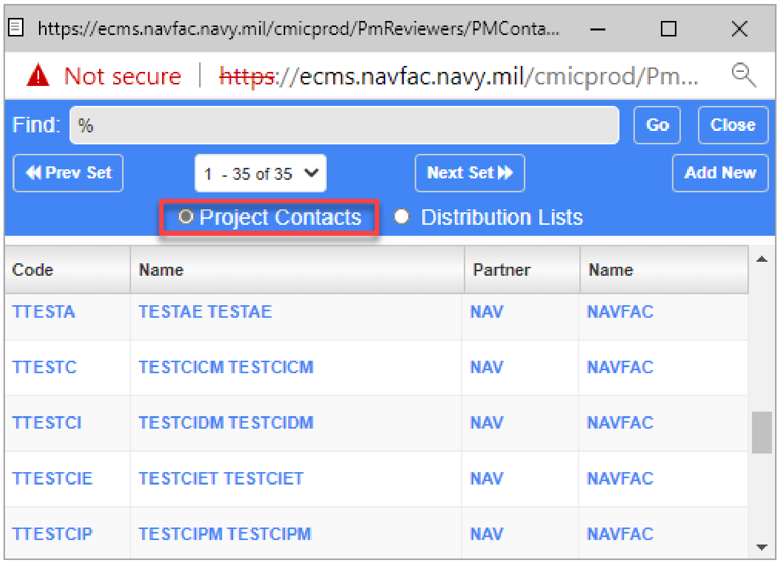


Scroll down to the Reviewers section and click [**Add Reviewer**].



To select reviewers, click the Search icon in the Reviewer field.

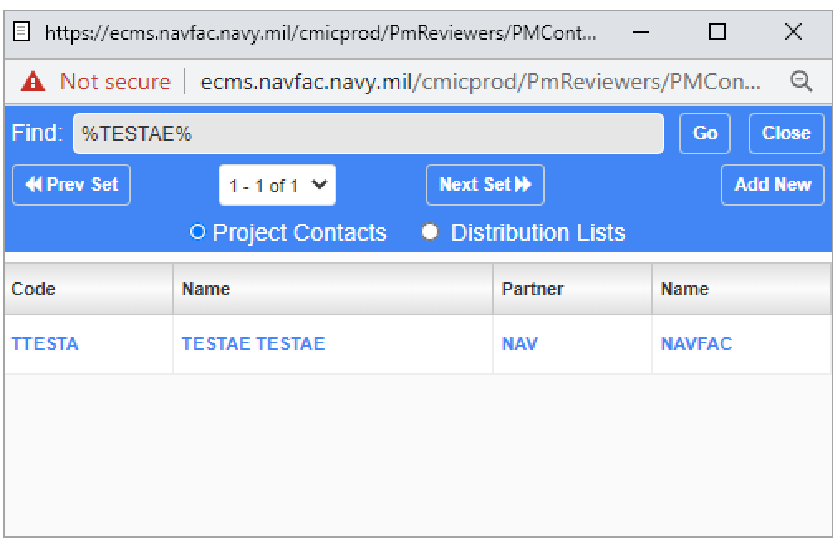
A pop-up window of Project Contacts will display. From here, there are a few options. To select individual reviewers, select the ‘Project Contacts’ radio button and then select a project contact. The screenshot below displays this option.



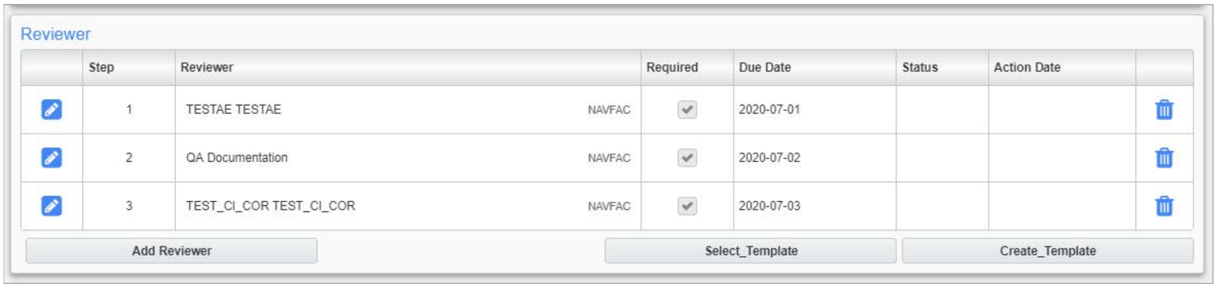
If you want to select users of a Distribution List, select the ‘Distribution Lists’ radio button and then select the Distribution List you want to add as reviewers. Once a reviewer or distribution list is selected, the pop-up window will close, and the selection will be added to the Reviewer section.

You can also search for a reviewer by using the wild card %. Enter the contact name between % signs. Click [**Go**].

The search will produce a list of names with the element searched for. In this case, there is just one, Test AE. Like the first option, select the reviewer to add them to the Reviewer section.



The selected reviewers will be listed in the Reviewer section, as shown below. The sequence of reviewers can be selected by designating the desired Step: Step 1, Step 2, Step 3 and so on. Check the ‘Required’ box and select a Due Date for each reviewer. The due date defaults to the current date for the first or only reviewer and adds a day for every additional reviewer. The COR/CM can change those dates to align with the RFI. Add the COR/CM as the final reviewer

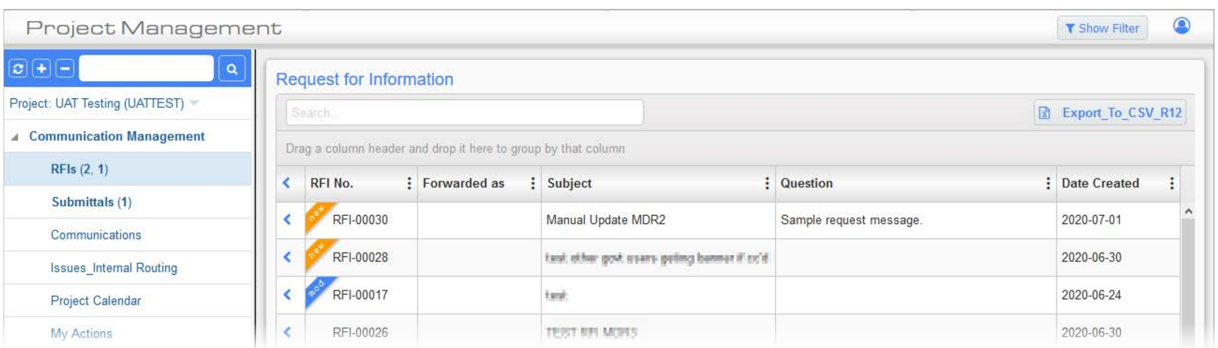


Update the RFI with any additional information that you would like to include such as Attachments, Related Objects and/or a note in the Notes section. At this point, the COR/CM can decide if the new note stays "Private" or should be changed to "Public".

To add reviewers using a Distribution List, from the Reviewers section, click the [**Select Template**] button. A pop-up window will display with a list of distribution lists. Click the desired list, and it will populate the Reviewer list.

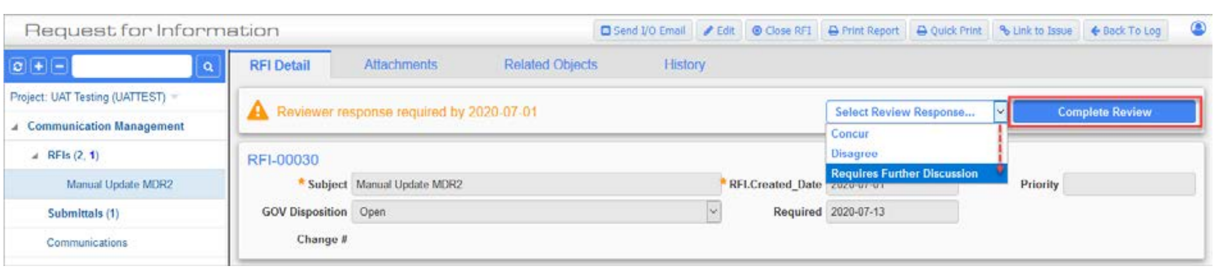
3.2.2.4 Responding to an RFI as a Reviewer (SME)

Open the Communication Management folder in the Navigation pane and click RFIs. The reviewer(s) will see RFI bolded and a number indicating the number of RFIs to be reviewed. If there are two numbers, the first number indicates number of new RFIs to be reviewed and the second number indicates number of RFIs modified.

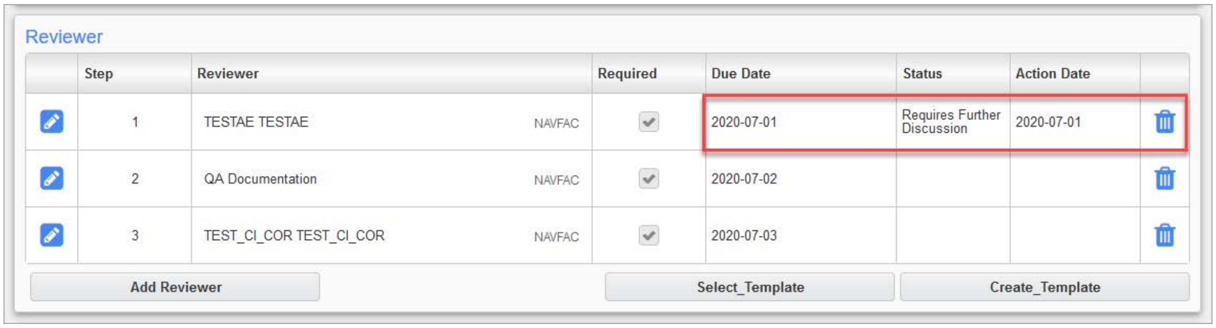


The new RFI will be located at the top of the RFI log. Click on the RFI's row to open.

When the reviewer opens the RFI, there will be a notification in orange text at the top of the screen indicating the due date for the response from the reviewer. From here, the reviewer can review the details of the RFI, add Notes, open and review the Attachments, Related Objects and History. Once everything has been reviewed, the reviewer can select an answer from the [**Select Review Response**] button and click [**Complete Review**].

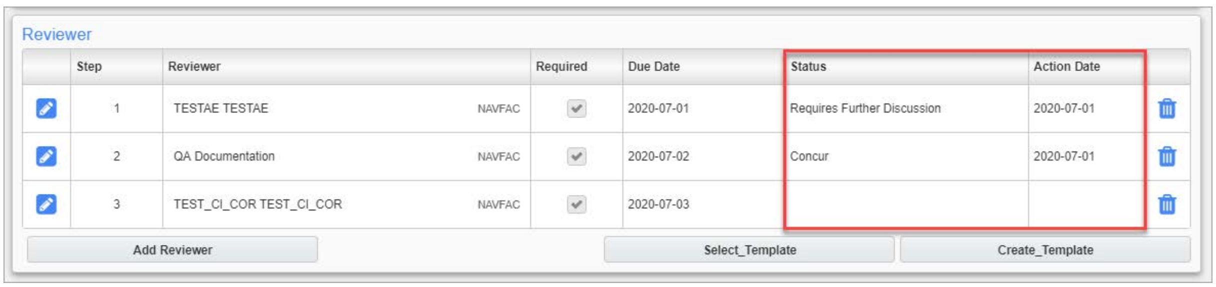


The reviewer scrolls to the Reviewers section to check that the selected review response has populated in the Status and the decision date is reflected under the Action Date.

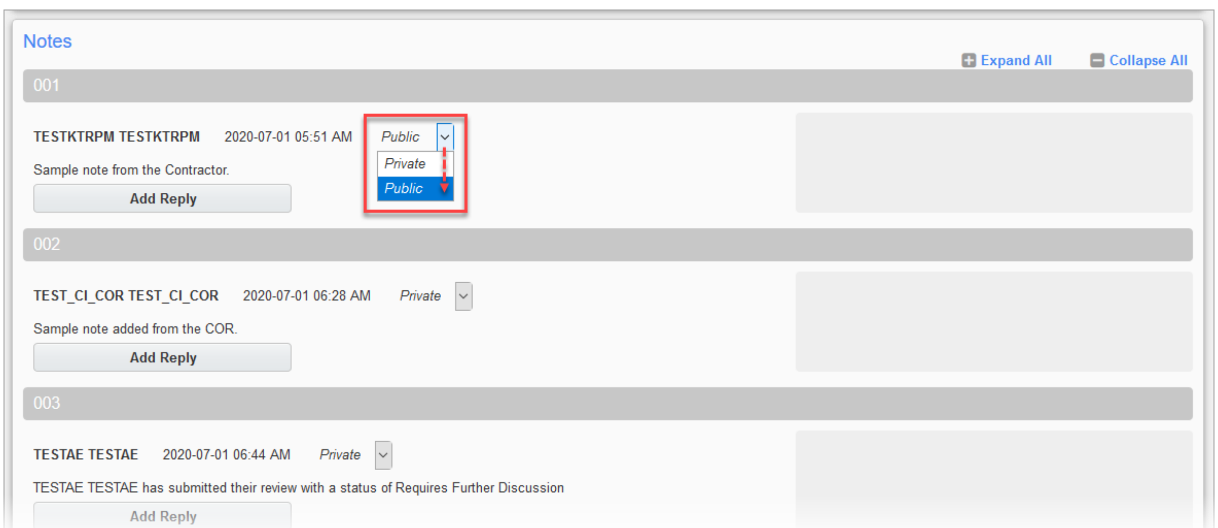


3.2.2.5 COR/CM Answering after Reviewer(s) Respond to RFI

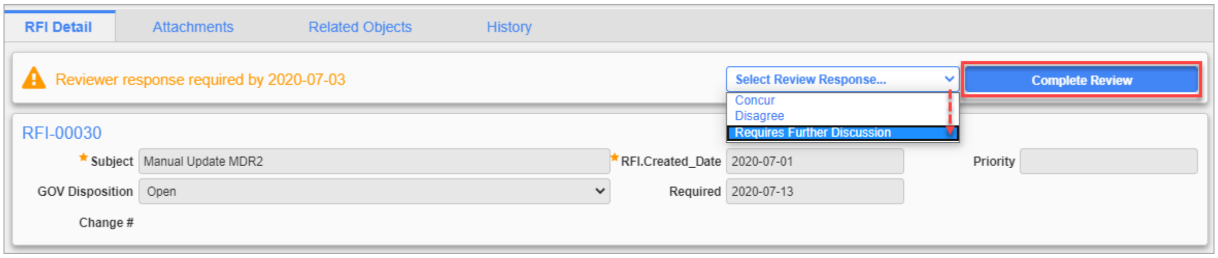
Once the response is received from the reviewer(s), open the RFI and scroll to the Reviewers section to view the responses from the reviewers. The responses are found under GOV Disposition along with the response date listed under Action Date.



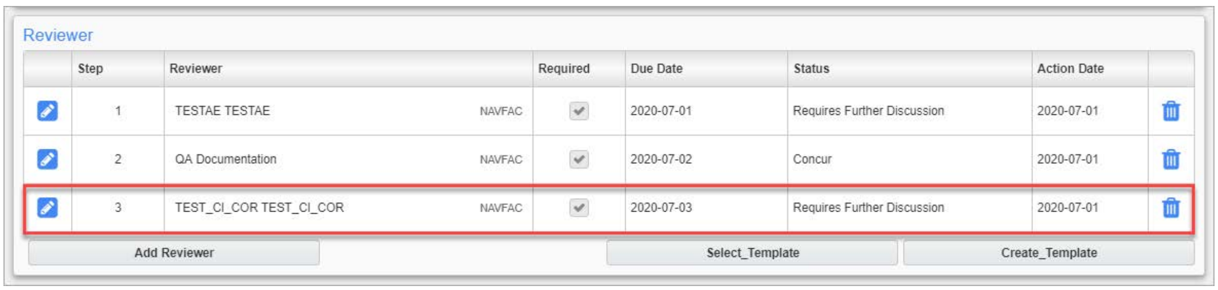
Open and review any additional Attachments, Related Objects and Notes. A new note may be added. At this point, the COR can decide if any or all of the Notes should remain "Private" or be made "Public".



The COR completes the last review in the table by selecting a review response from the [**Select Review Response**] drop-down menu and clicking on the [**Complete Review**] button.



The selected review response populates the Status in the Reviewer section and the decision date is reflected under the Action Date.



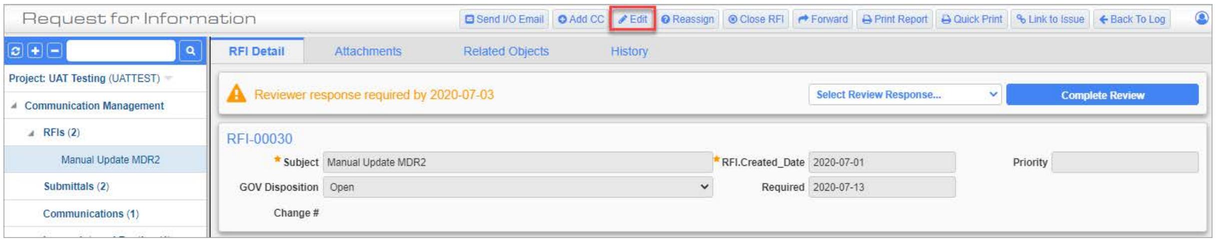
Now, the COR/CM is ready to answer the RFI. Scroll to the top of the screen. The following menu buttons are displayed.

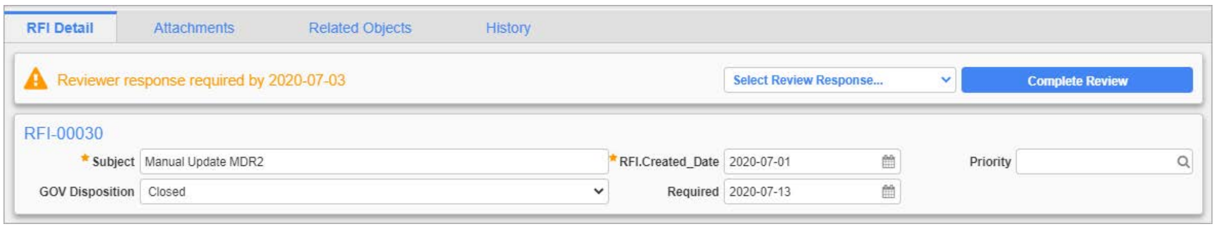
Each of these options serves a distinct purpose:

- **Send I/O E-mail** – This button has been disabled for NAVFAC security purposes.
- **Add CC** - Copies a User to an RFI; allows the User to edit and add notes.
- **Edit** – Allows for changes to be made in any field.
- **Reassign** – Used by the COR/PAR to reassign to alternative COR/PAR.
- **Delete** – COR/PAR only can delete an RFI.
- **Close RFI** – Final disposition made by the COR/PAR.
- **Forward** – To be completed.
- **Print Report** - Prints a report of the RFI.
- **Quick Print** – This field is currently not configured for use.
- **Link to Issue** - Links the RFI to Issues_Internal Routing task for team members.
- **Back to Log** – Returns user to RFI Log.

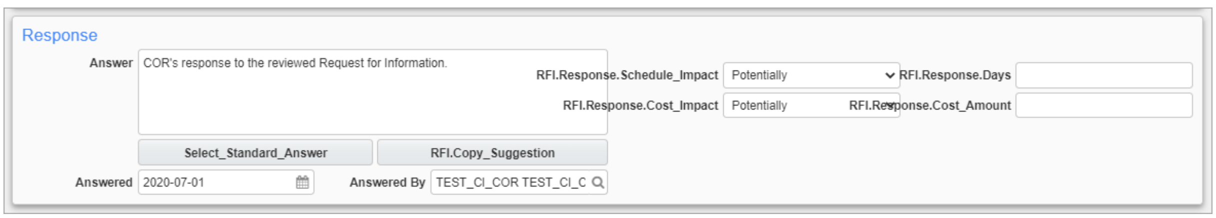
Click on the [**Edit**] button.

In the GOV Disposition field, select "Closed" from the drop-down menu.

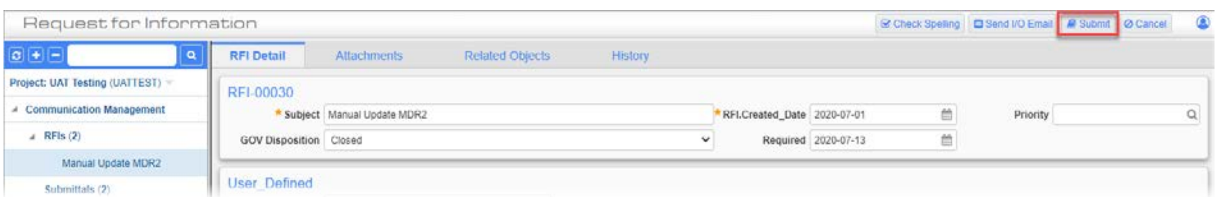




Enter an answer in the Response section.



Click on [**Submit**]. The Contractor will be notified that the RFI has been answered.



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.

- **RFI Detail** - The first tab, RFI Detail, has the bulk of information about the RFI.
- **Attachments** - The Attachments tab will have attachments sent with this RFI. This is another screen that can be used to add attachments.
- **Related Objects** - The Related Objects tab will track communication, issues, and relevant documentation with stakeholders throughout the project.

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

3.2.3.1 Attachments

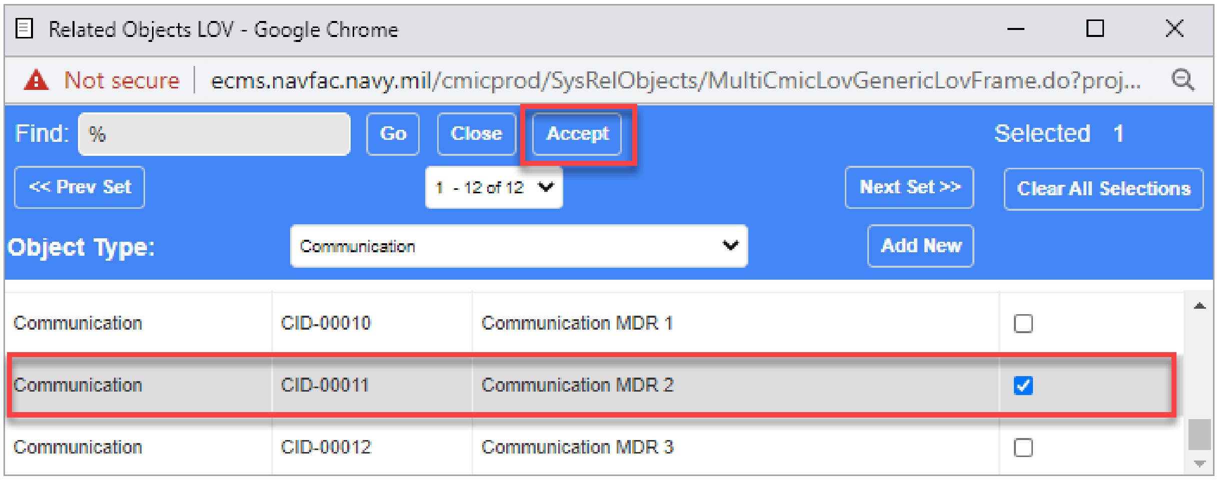
To upload or download attachments, refer to *Section 5.4.1 Uploading Attachments* and *Section 5.4.2 Downloading Attachments*.

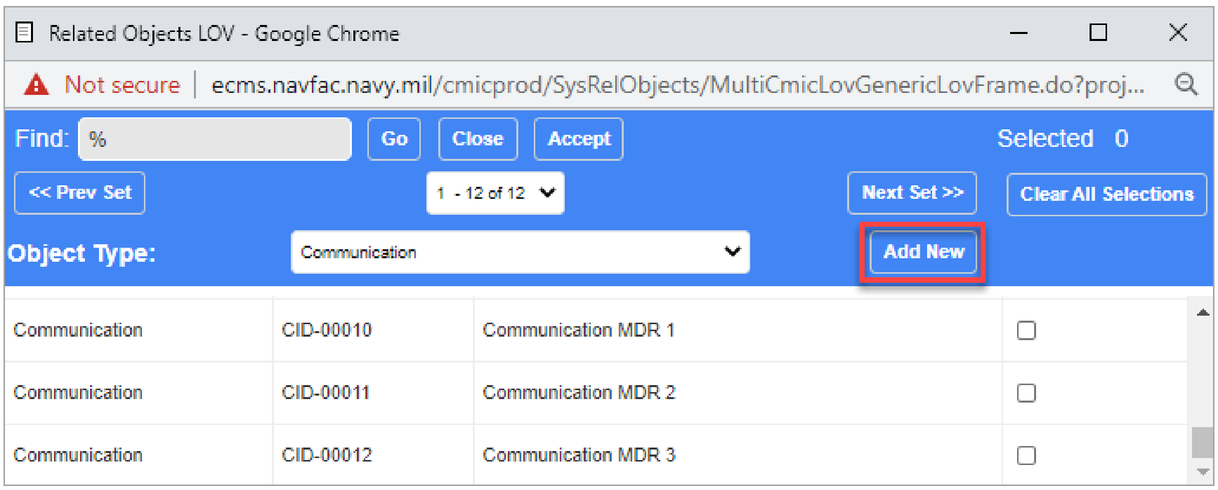
3.2.3.2 Adding Related Objects

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

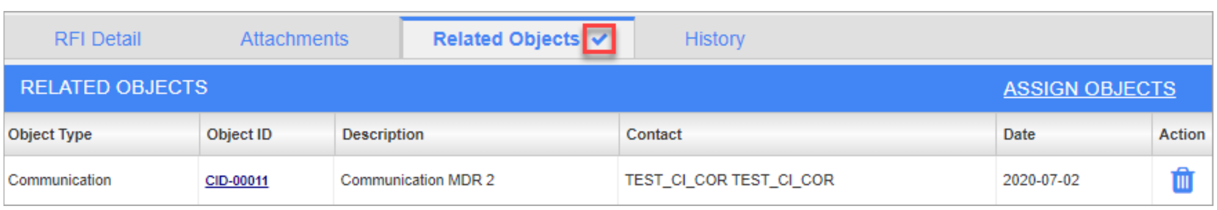
Click on the Related Objects tab and select the Assign Object link at the right corner of the screen.

Click the drop-down 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.



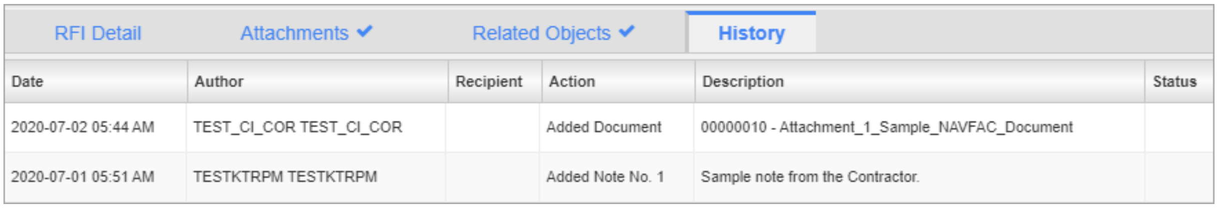


There will now be a checkmark next to the Related Objects tab indicating that there is a related object.



3.2.3.3 Reviewing the RFI History

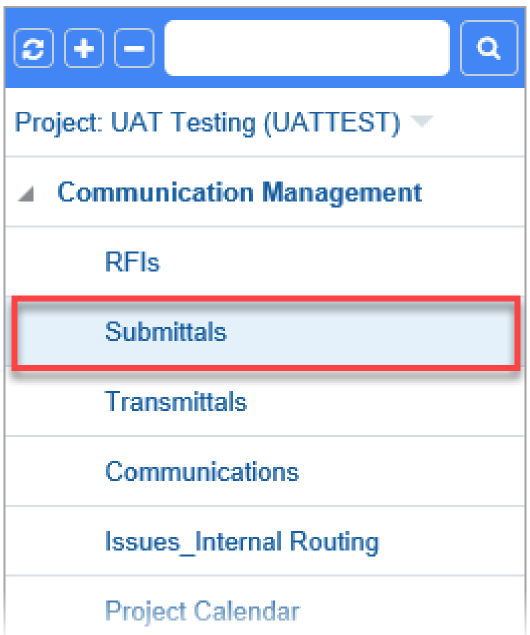
The History tab displays all decisions, edits, and notes made to an RFI.



3.2.4 Submittal Process

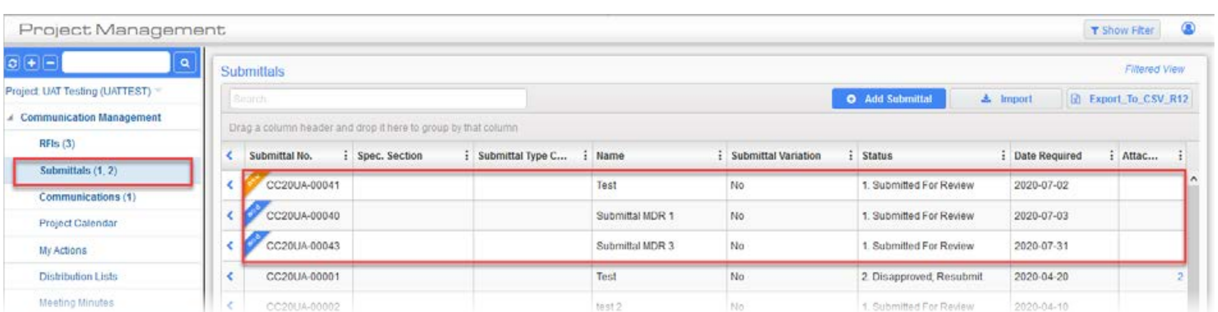
3.2.4.1 Responding to a Submittal as the COR

To access Submittals, go to the Navigation Panel, open Communication Management, and then select Submittals.



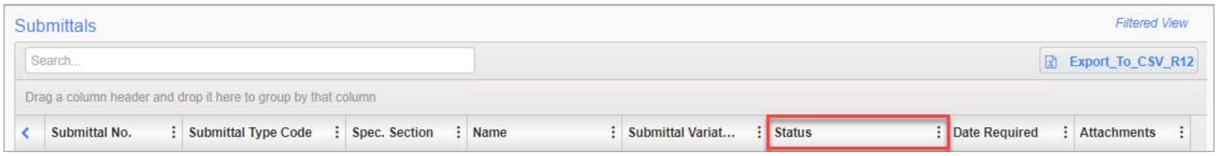
This opens the Submittals log.

Submittals will be bolded with a number indicating that a new Submittal(s) has been submitted for review.

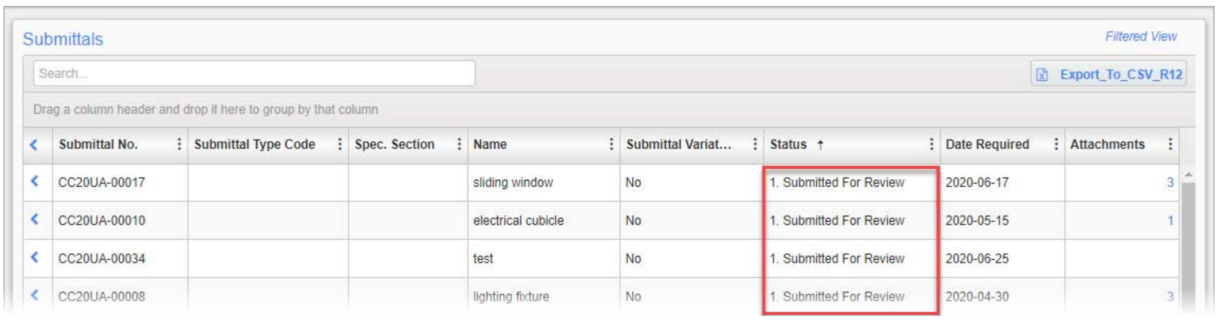


In this case, there is one (1) Submittal to review. If there are two numbers, the first number indicates number of new Submittals to be reviewed and the second number indicates number of Submittals modified. The submittals can be opened by clicking the row of the submittal on the navigation pane under Submittals or from the Submittal log. The log lists the Submittals to be reviewed at the top of the list.

From here, you can see all Submittals created on this project. Click on the Status heading so the submittals will filter the “1. Submitted For Review” submittals to the top.



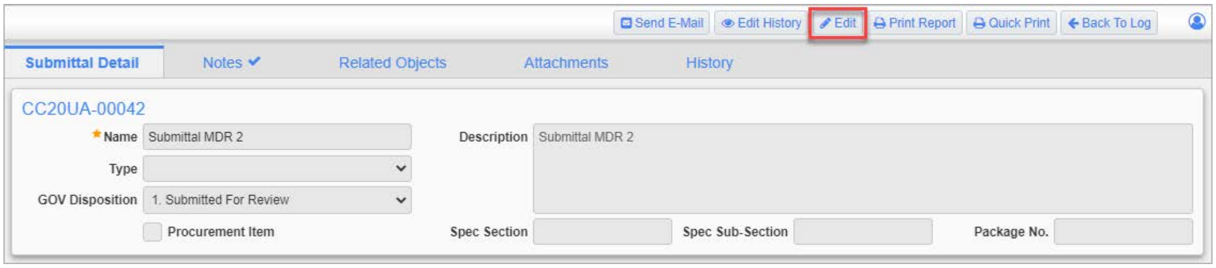
Below is an example of the submittals that are “1. Submitted for Review” filtering to the top. To see which submittals were submitted to the Government you need to check the "Sent Date" column. If there is no date in the "Sent Date" column the submittal is still in "draft".



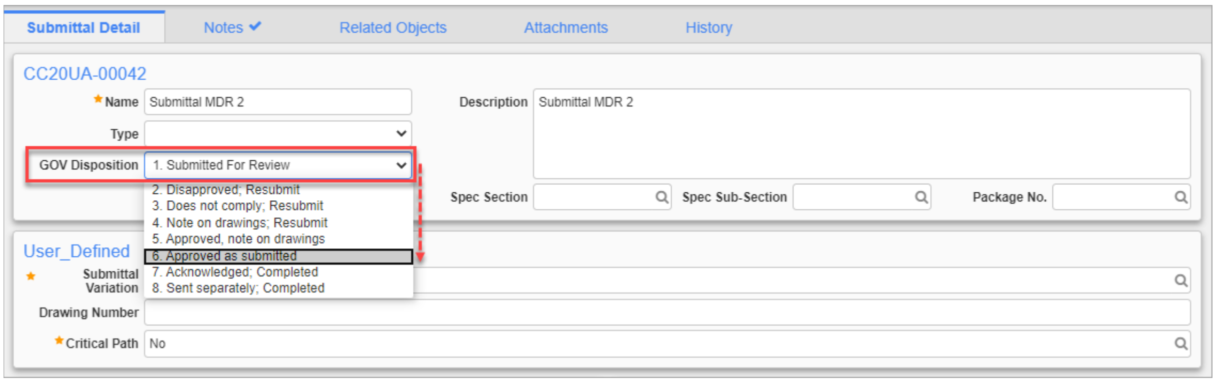
Locate the submittal and hover over the row until it is highlighted. Click on the highlighted row to view the submittal.

As the COR, you have two options: to answer the Submittal or to add a reviewer. For this example, we will answer the Submittal.

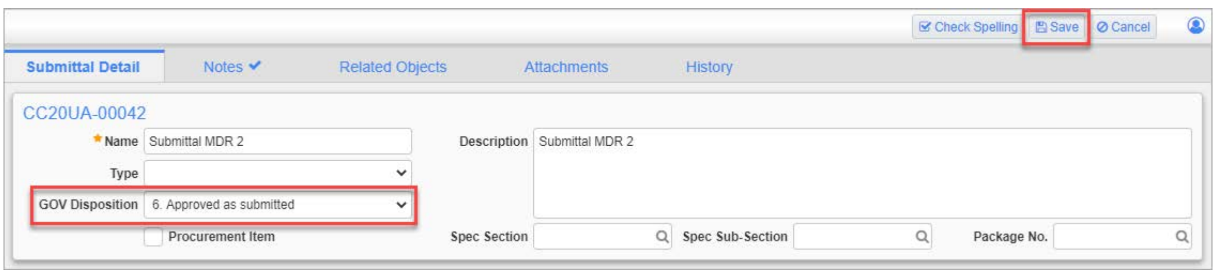
Click on [**Edit**] at the top of the Submittal.



In the GOV Disposition field, select the status in the drop-down menu.



Once you have reviewed the Submittal and selected the Status, click [**Save**] at the top right corner.

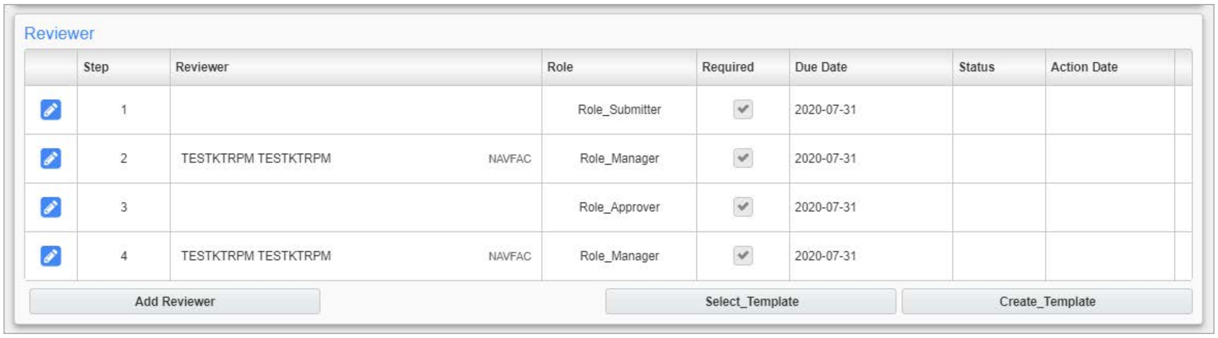


For this example, we chose option 6, “Approved as submitted”. Now the contractor can see the COR’s response.

3.2.4.2 Adding Reviewers to Submittals

As the COR, you have two options: to answer the Submittal or to add a reviewer. For this example, we will add a reviewer. In the submittal, scroll down to find the Reviewer section.

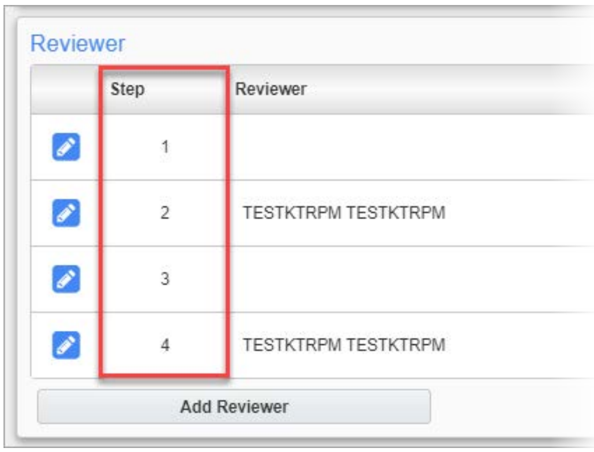
This section has default reviewers automatically populated in certain steps, as shown in the screenshot below. For these pre-populated reviewers, the ‘Required’ checkbox is checked and the Due date is entered by default. If adding additional reviewers beyond these default ones, the ‘Required’ checkbox will need to be checked and the Due Date entered.



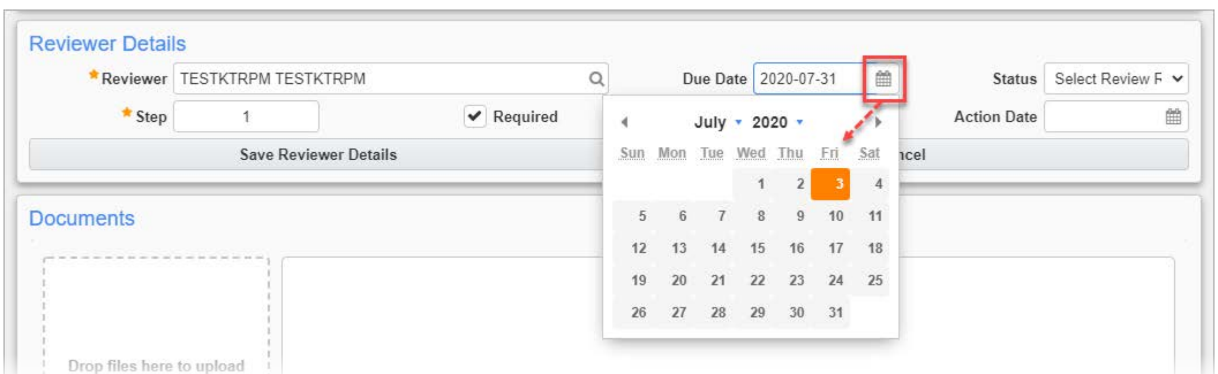
Reviewer

	Step	Reviewer		Role	Required	Due Date	Status	Action Date
	1			Role_Submitter	✔	2020-07-31		
	2	TESTKTRPM TESTKTRPM	NAVFAC	Role_Manager	✔	2020-07-31		
	3			Role_Approver	✔	2020-07-31		
	4	TESTKTRPM TESTKTRPM	NAVFAC	Role_Manager	✔	2020-07-31		

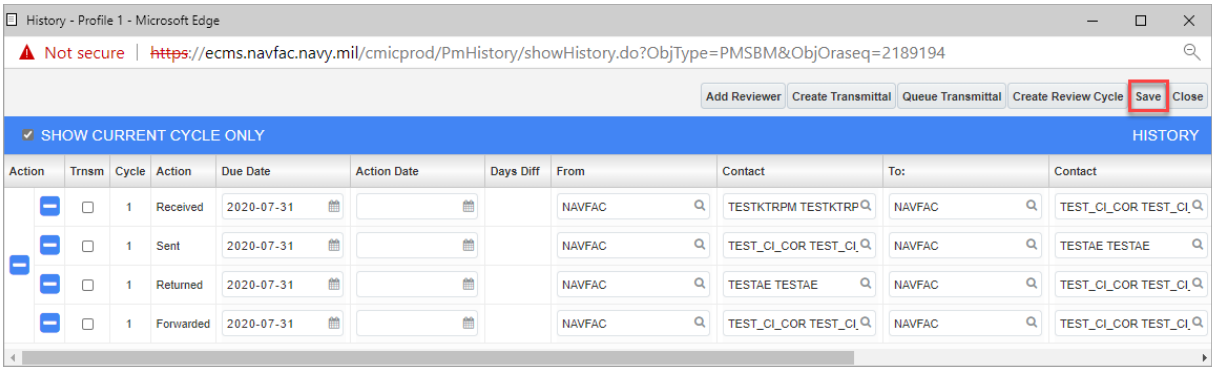
The Step indicates the order of review. For an example, since there are multiple reviewers, Step 1 would be the first to review the Submittal, Step 2 would be the second to review, and so on.



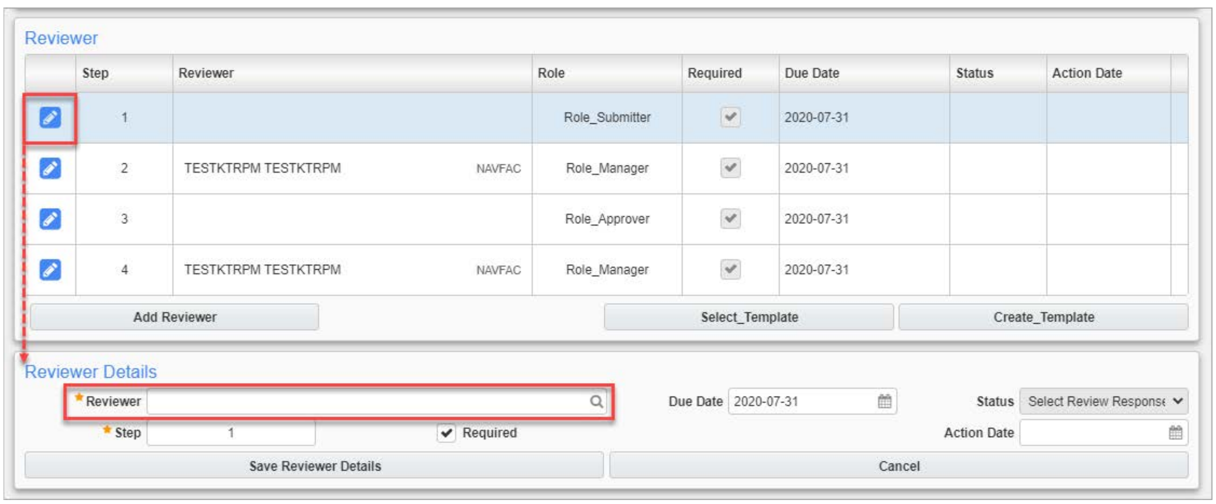
The COR can change the due date for the reviewer response by clicking on the Edit icon ( ) beside the relevant step and opening the Reviewer Details section. From there, the Calendar icon ( ) can be selected in the Due Date field to select a new date.



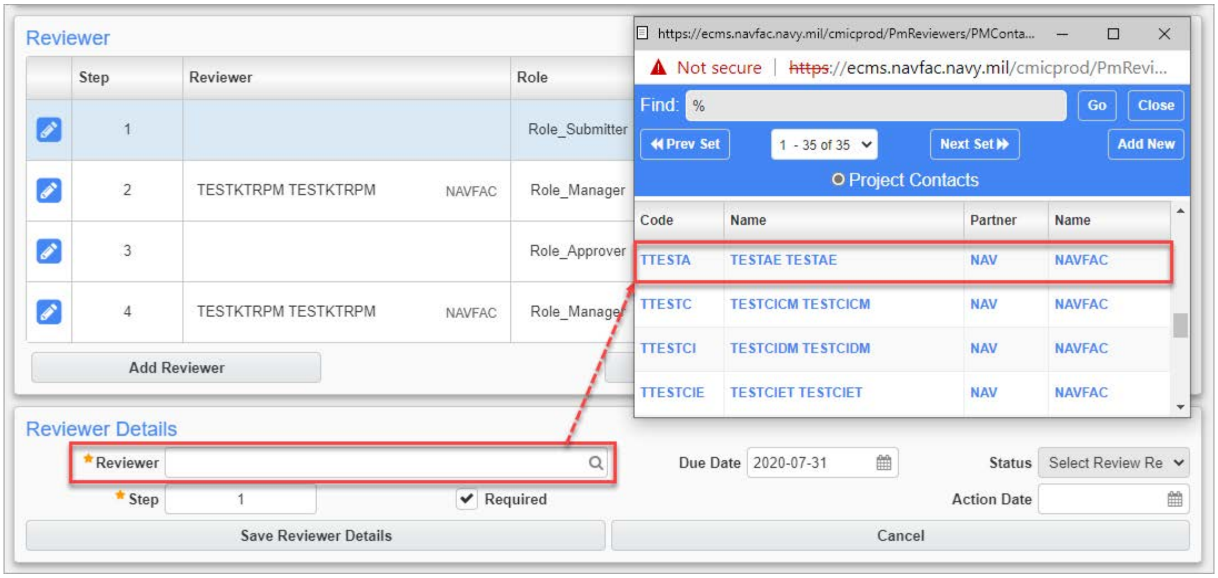
To quickly add reviewers to the list, click on the [**Edit History**] button at the top of the Submittal to launch the History Profile pop-up window. In the pop-up window, use the From and To Contact columns to insert reviewers. This window allows you to enter the same reviewer at multiple steps, if required. When finished adding reviewers, click on [**Save**].



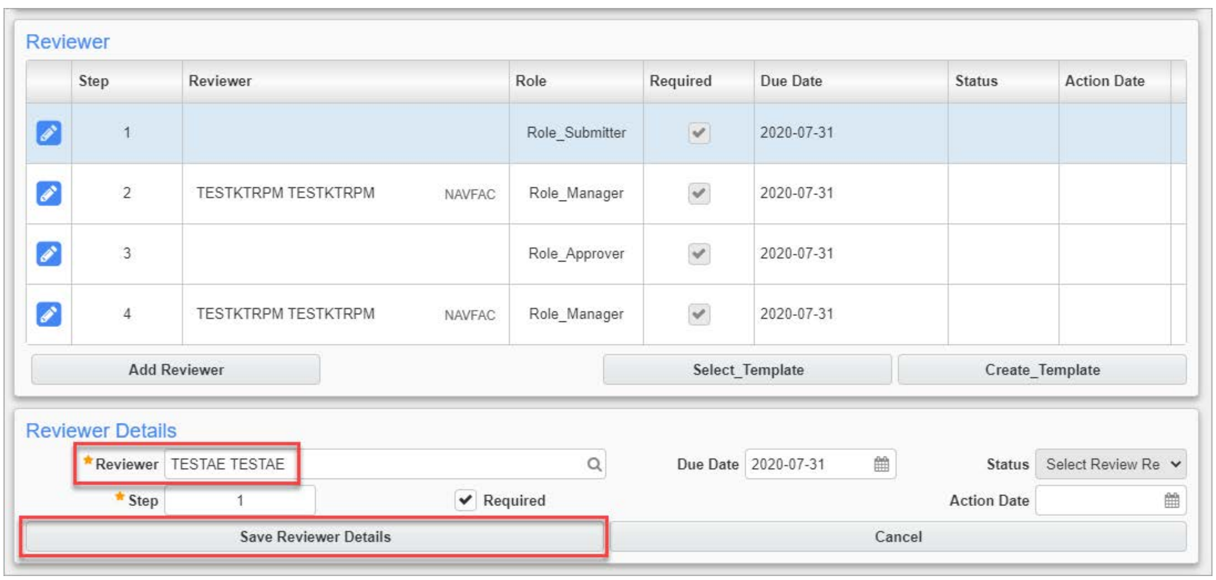
Otherwise, to add reviewers individually, scroll down to the Reviewer section. To add a reviewer in Step 1, click on the Edit icon ( ) in that row. The Reviewer Detail section displays below where you can add the reviewer.



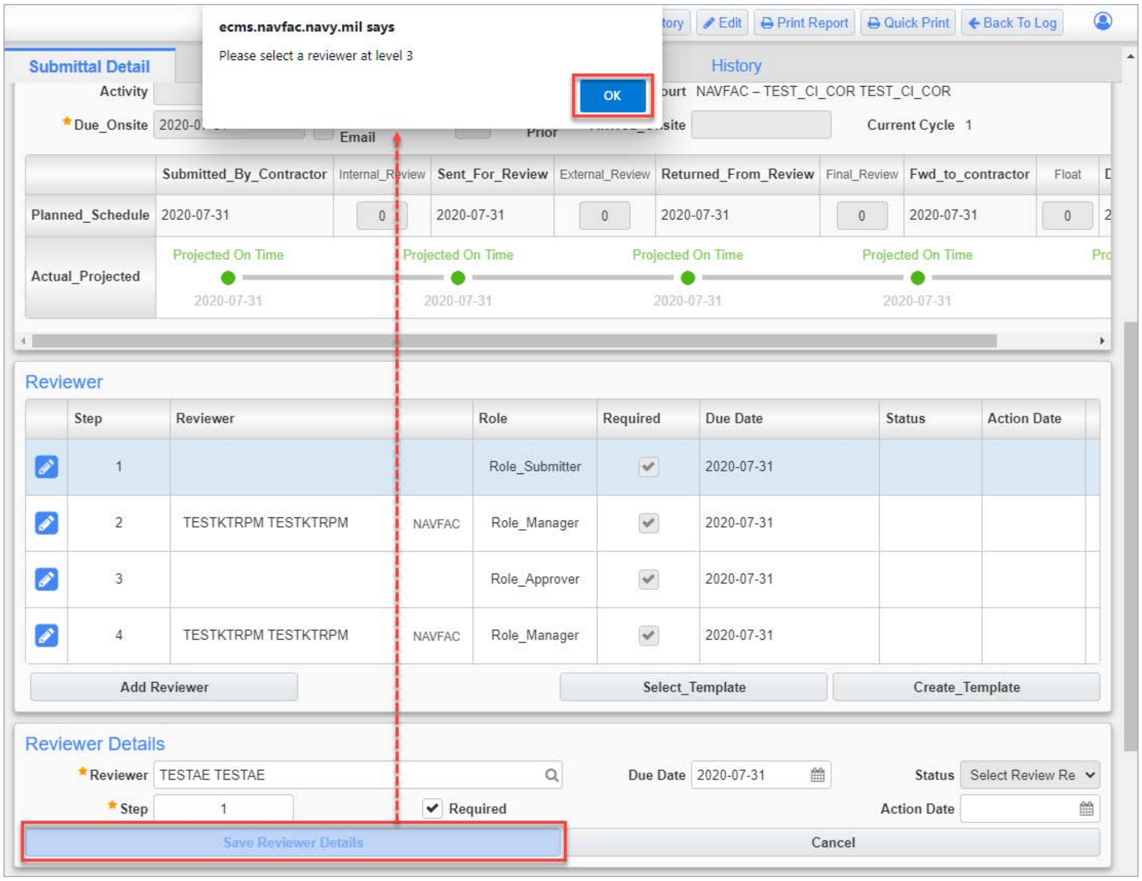
Click on the Search icon in the Reviewer field to launch the pop-up window where the reviewer can be selected and added to the Reviewer Details section.



In the Reviewer Details section, click on [**Save Reviewer Details**].

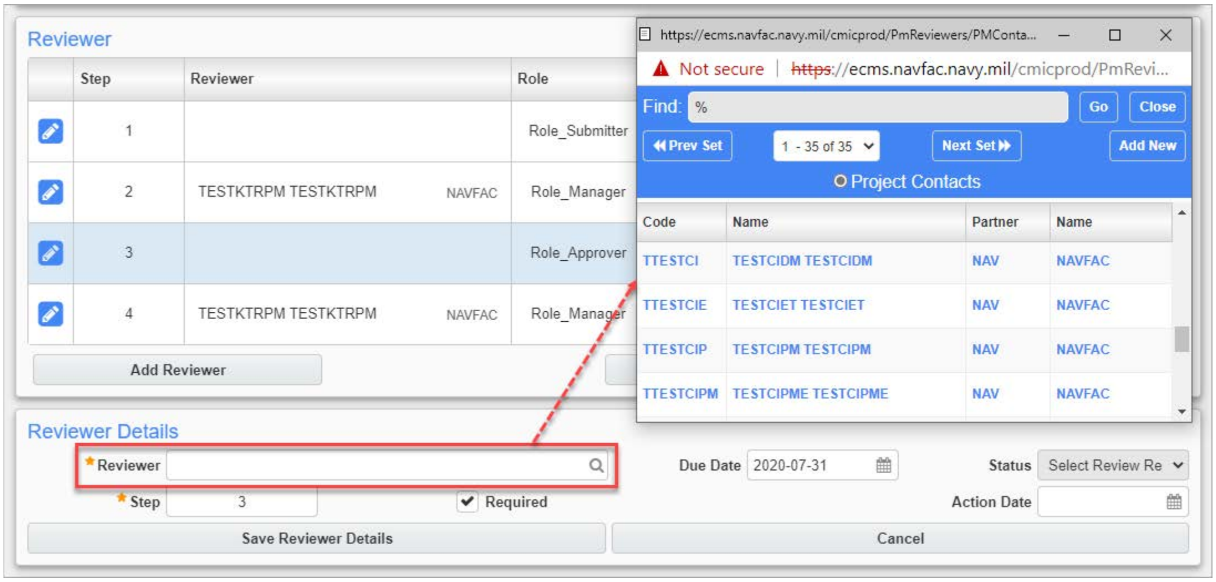


A message appears to indicate that a reviewer must now be selected for level 3 (or Step 3). Click [**OK**] to close the message.

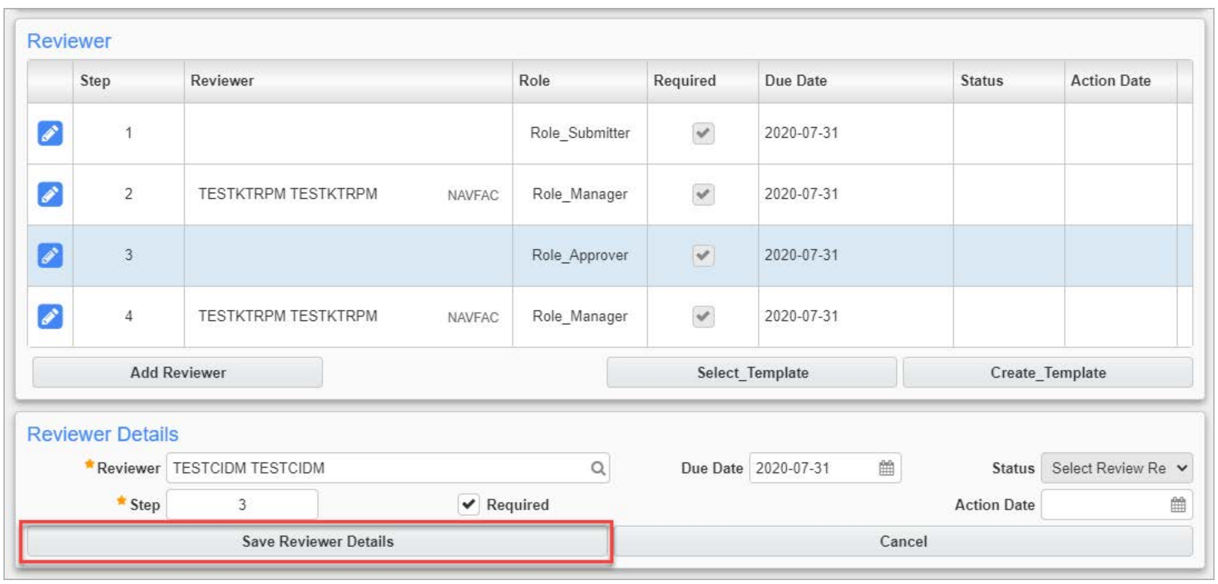


Click on the Search icon to add a reviewer to Step 3.

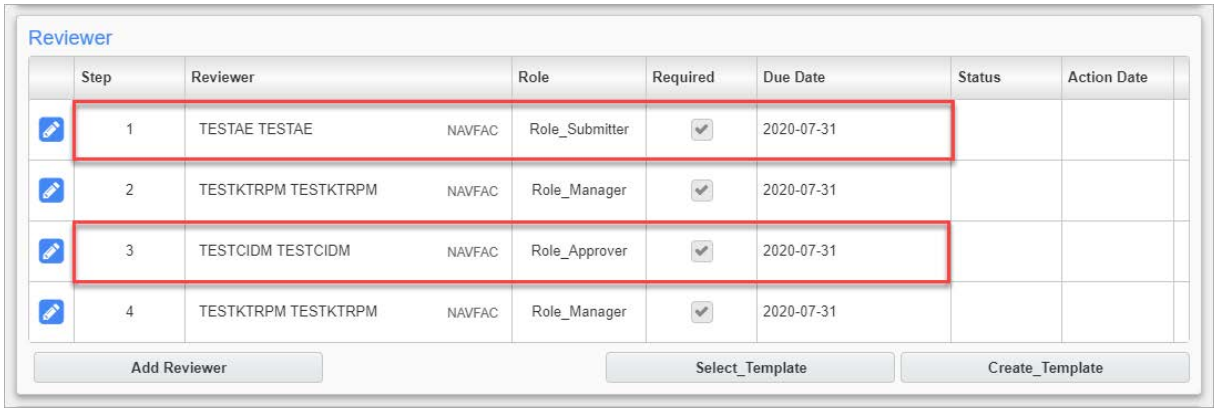
NOTE: The Step 1 reviewer will not be displayed until the Step 3 reviewer has been added.



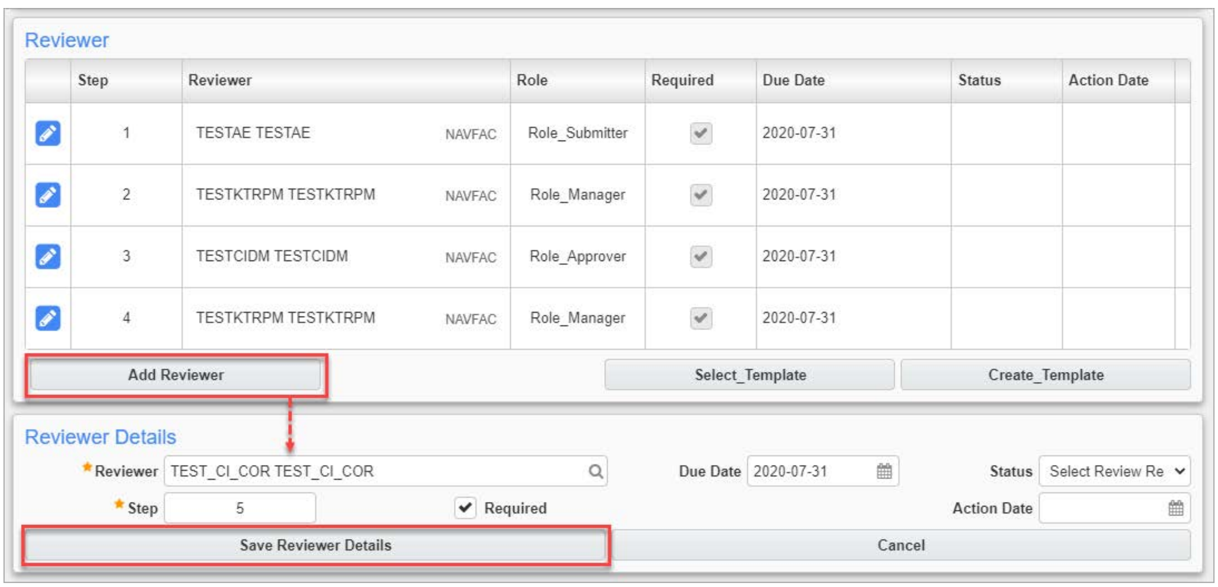
Click on [**Save Reviewer Details**] in the Reviewer Details section. The Step 1 and Step 3 reviewers will not be displayed in the list until this button is pressed.



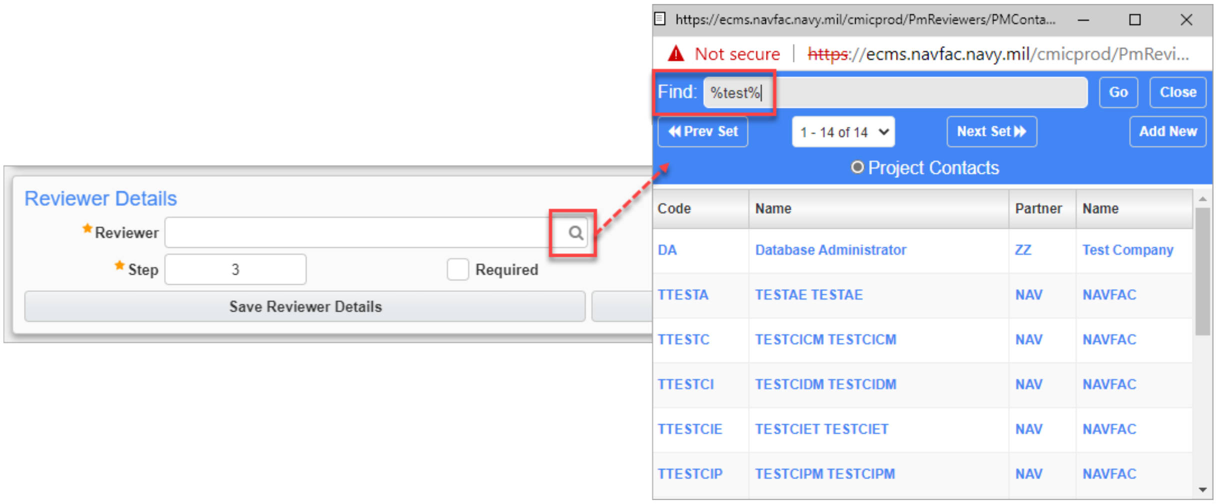
The reviewers have been added to Step 1 and Step 3.



As a rule, the COR should be added to the list as the last reviewer. To add the COR as the last reviewer, click [**Add Reviewer**]. In the Reviewer Details section, add the COR reviewer using the Search icon. Ensure the Step field contains a valid step number and check the 'Required' checkbox.



To search for the reviewer, click on the Search icon to open the Project Contact pop-up window. Type the percent sign (%), which is the wild card for your search and then type either the first or last name. In the example below, %test% is typed in the Find search bar, and the names with "test" filtered. If you need to add multiple users of a Distribution List as reviewers, navigate to Distribution Lists in the pop-up and select the Distribution Lists.



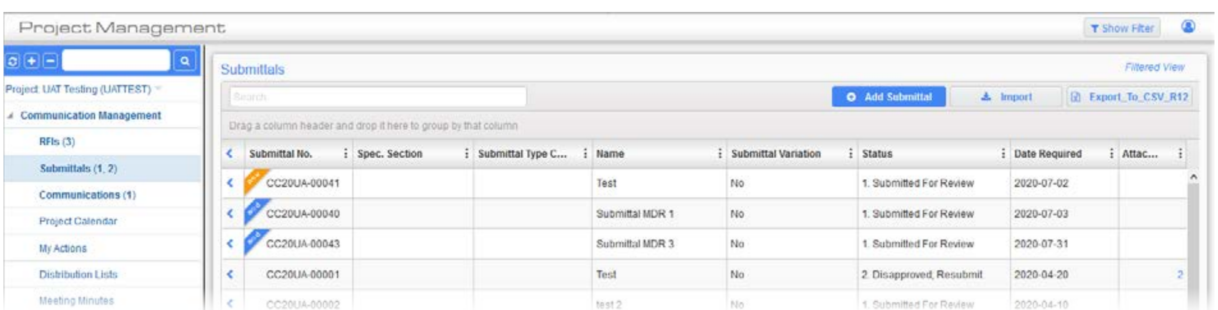
Once you have reviewed the submittal and you're ready to send it to the reviewer, select [**Save**]. The reviewer will now need to respond.

3.2.4.3 Responding to a Submittal as a Reviewer

Once the COR adds a reviewer and saves the submittal, it is time for the reviewer to respond.

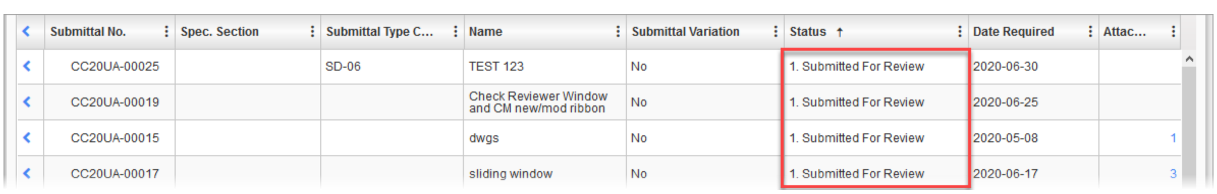
After the reviewer logs in, go to the Navigation Panel, open Communication Management, and then select Submittals.

The reviewer(s) will see Submittals bolded and a number indicating the number of Submittals to be reviewed.



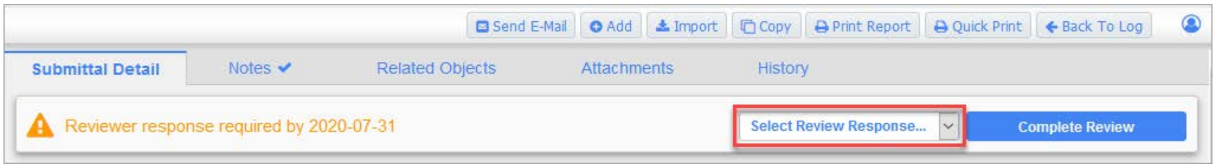
New Submittals will be located at the top of the RFI log.

Click on the Status heading so the submittals will filter the "1. Submitted For Review" submittals to the top.

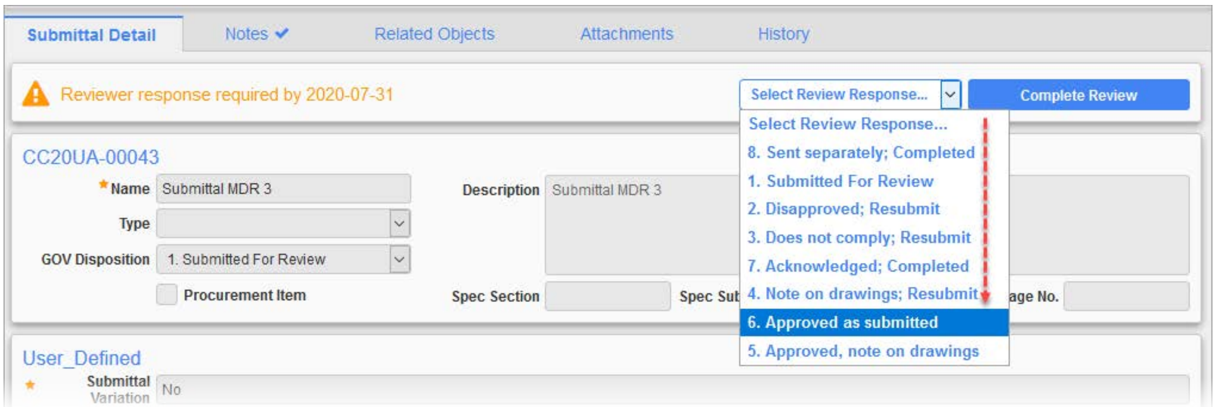


Locate the submittal and click on the Submittal's row to open.

Once the reviewer opens the submittal, they will see a notification that appears at the top of the submittal in orange text, informing the reviewer of when the response is due. Review the submittal and then click on the [**Select Review Response**] button.



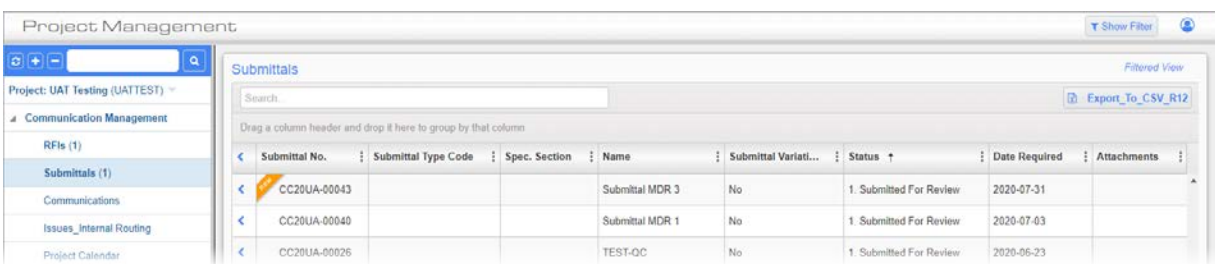
Select the review response from the drop-down menu.



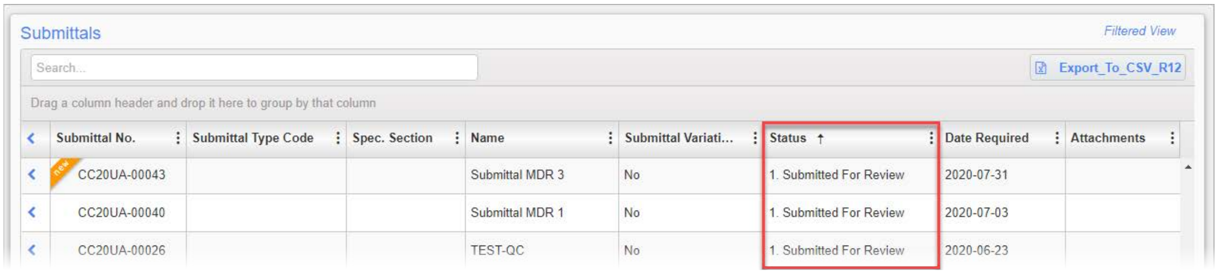
Once you have selected your review response, click [**Complete Review**]. The COR will now need to respond to the Submittal.

3.2.4.4 COR Answering after Reviewer(s) Respond to Submittal

After logging in, go to the Navigation Panel, open Communication Management, and then select Submittals. The COR will see Submittals in bolded and a number indicating the number of Submittals to be reviewed.



Click on the Status heading so the submittals will filter the “1. Submittal for Review” to the top.



Submittals

Filtered View

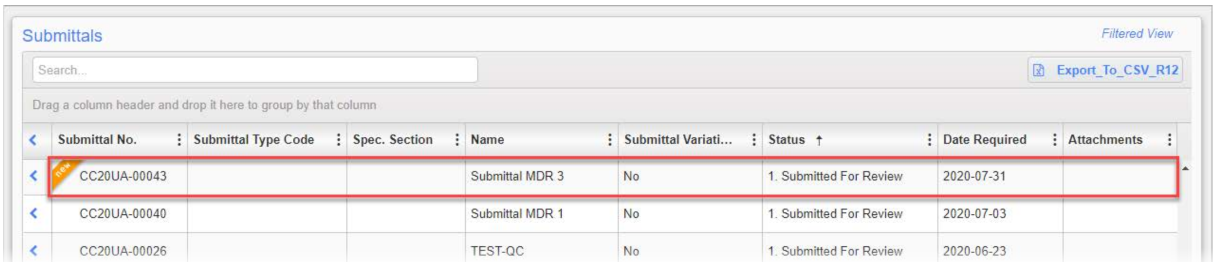
Search...

Export_To_CSV_R12

Drag a column header and drop it here to group by that column

Submittal No.	Submittal Type Code	Spec. Section	Name	Submittal Variati...	Status ↑	Date Required	Attachments
CC20UA-00043			Submittal MDR 3	No	1. Submitted For Review	2020-07-31	
CC20UA-00040			Submittal MDR 1	No	1. Submitted For Review	2020-07-03	
CC20UA-00026			TEST-QC	No	1. Submitted For Review	2020-06-23	

Locate the submittal and click on the submittal's row to open it.



Submittals

Filtered View

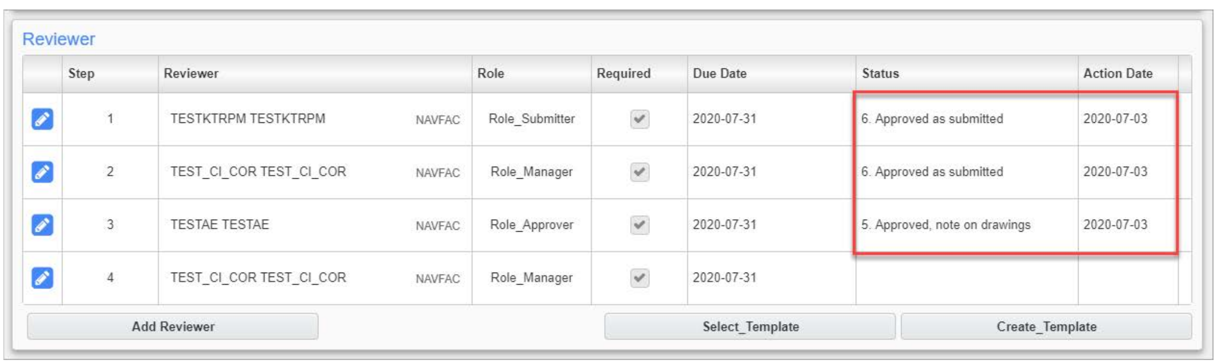
Search...

Export_To_CSV_R12

Drag a column header and drop it here to group by that column

Submittal No.	Submittal Type Code	Spec. Section	Name	Submittal Variati...	Status ↑	Date Required	Attachments
CC20UA-00043			Submittal MDR 3	No	1. Submitted For Review	2020-07-31	
CC20UA-00040			Submittal MDR 1	No	1. Submitted For Review	2020-07-03	
CC20UA-00026			TEST-QC	No	1. Submitted For Review	2020-06-23	

Once you have opened the submittal, scroll down to the Reviewer section to see the responses. The responses will be under the "Status" category. In this example, you can see that the reviewers approved of the Submittal, with one note on the drawings. The Action Date is when the reviewer responded to the Submittal.



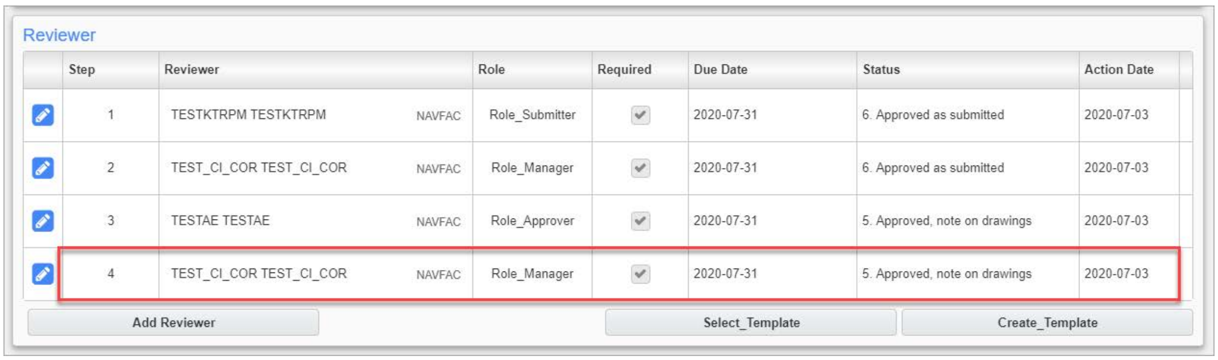
Reviewer

Step	Reviewer	Role	Required	Due Date	Status	Action Date
1	TESTKTRPM TESTKTRPM NAVFAC	Role_Submitter	✔	2020-07-31	6. Approved as submitted	2020-07-03
2	TEST_CI_COR TEST_CI_COR NAVFAC	Role_Manager	✔	2020-07-31	6. Approved as submitted	2020-07-03
3	TESTAE TESTAE NAVFAC	Role_Approver	✔	2020-07-31	5. Approved, note on drawings	2020-07-03
4	TEST_CI_COR TEST_CI_COR NAVFAC	Role_Manager	✔	2020-07-31		

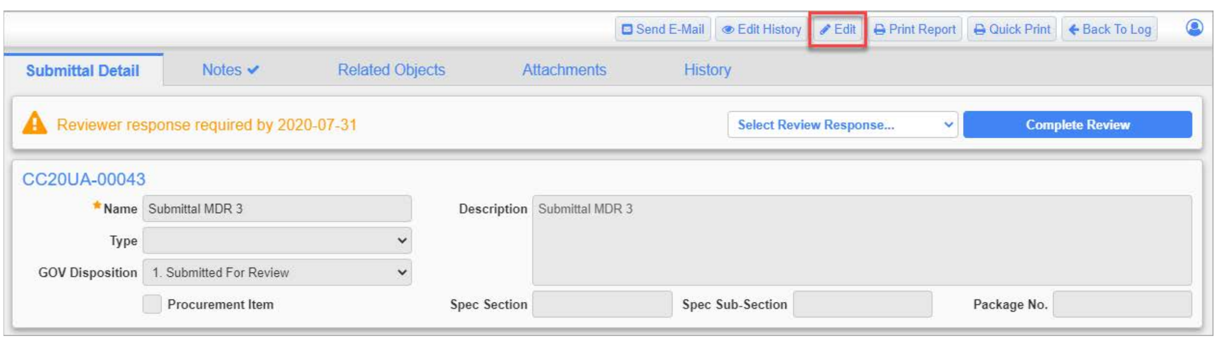
Add Reviewer | Select_Template | Create_Template

After reviewing the Submittal and the responses from the reviewers, the COR must add the final review by clicking on the [**Select Review Response**] button and selecting a status from the drop-down menu. Once selected, click on [**Complete Review**].

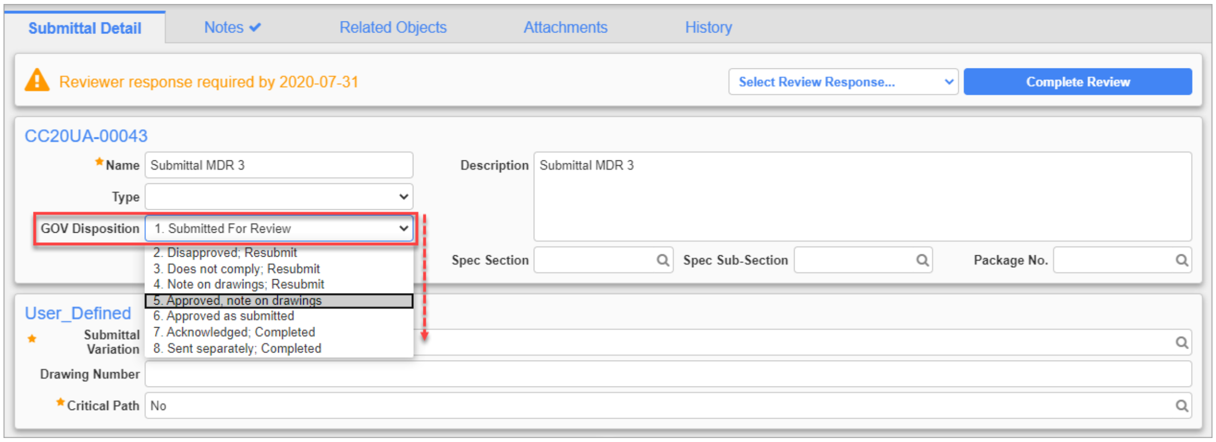
The COR's final review will be added to the Reviewer section.



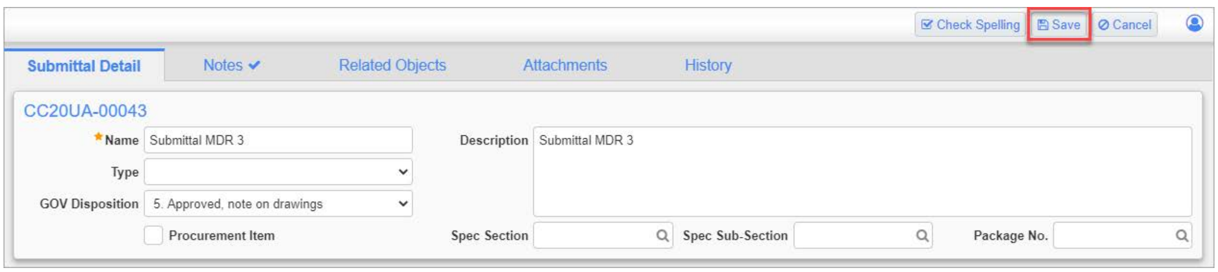
Now, the COR is ready to answer the Submittal. Scroll to the top of the Submittal and select [**Edit**].



Now that you are in edit mode, in the GOV Disposition field, select the status in the drop-down menu.



For this example, option “5. Approved, note on drawings” was chosen as the status. Once you have reviewed the submittal and selected the Status, click [**Save**] at the top right corner. Now the contractor can see the COR’s response.



3.2.5 Sorting Data

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

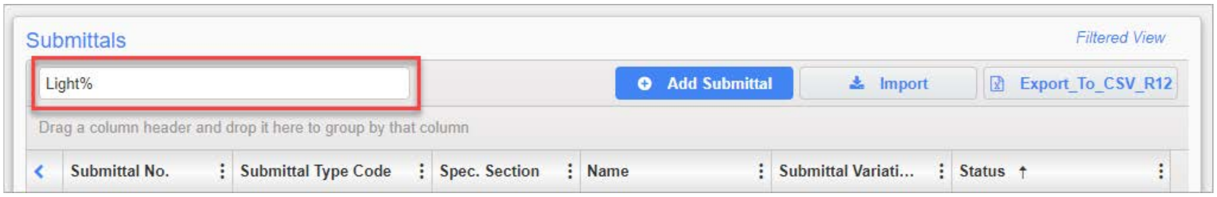
- Execute a query/search (Simplest; Recommended)
- Send information to a downloadable Excel spreadsheet and sort the information from there
- Use the Filtering function in eCMS (Most Complicated)
- Order and filter log data using columns

3.2.5.1 Enter and Execute a Query

A search bar appears above all log screens. Enter the term being searched and the table will automatically return the values containing that term.

For instance, to filter all Submittals with the word Light in the title, enter Light% in the Search field.

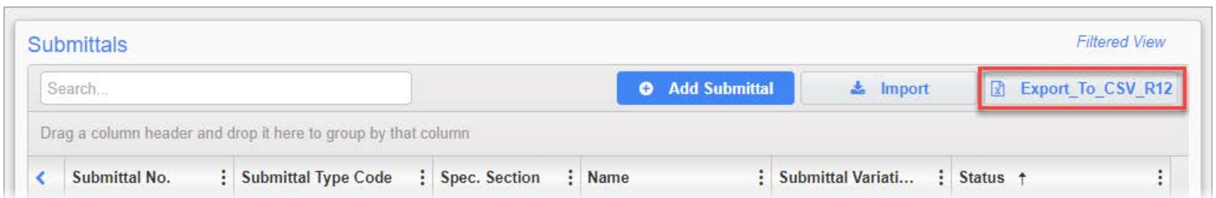
Naval Facilities Engineering Command



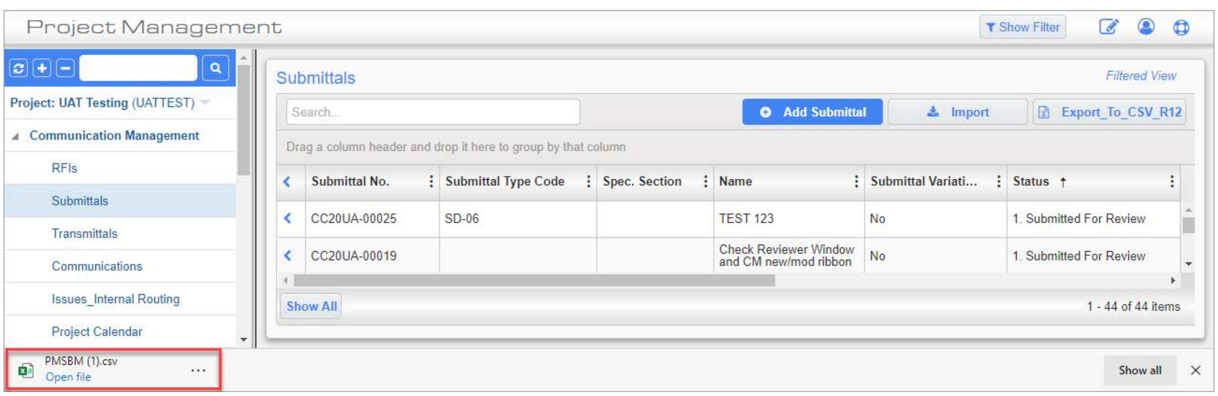
Use % to sort for a portion of text. For example, let's say we want to search for all RFIs that have the word "maximum" in the subject line. Someone may have shortened it to "max" when entering this field. To find everything with the word "Maximum" in the subject, we would enter %max% in the Search field. 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

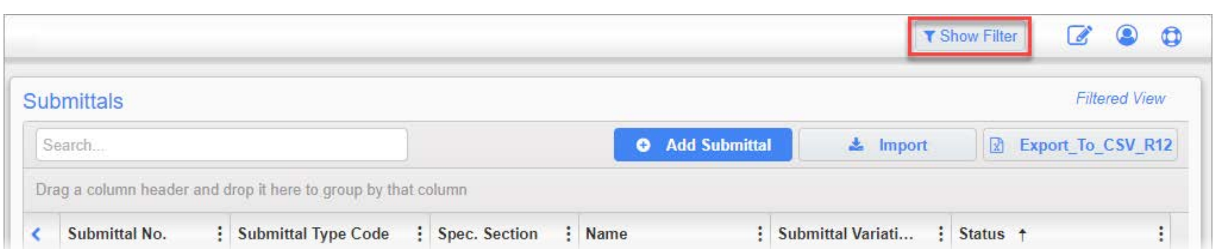
Send all RFIs or Submittals to an Excel spreadsheet, or send a filtered list to an Excel spreadsheet by clicking on the [**Export_To_CSV_R12**] button in the top, right corner of the screen.



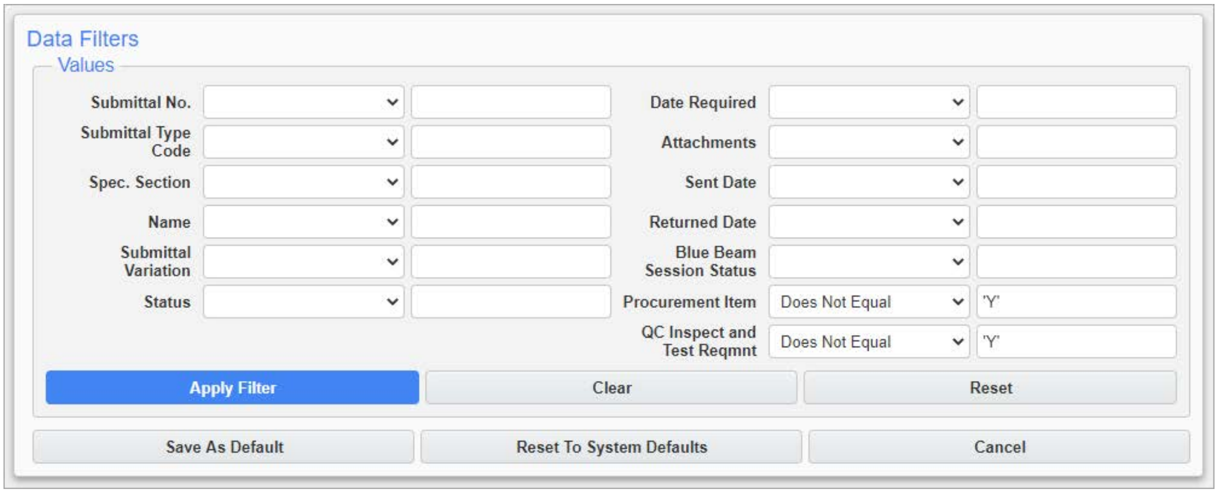
A spreadsheet will be automatically generated with all the user's RFI or Submittal information included. The spreadsheet can be launched by clicking on the Open File link on the lower left-hand side of the screen. Use the functions of Microsoft Excel to sort the fields and find specific information. If a filter is turned on, only the filtered list will download to Excel.



3.2.5.3 Filtering



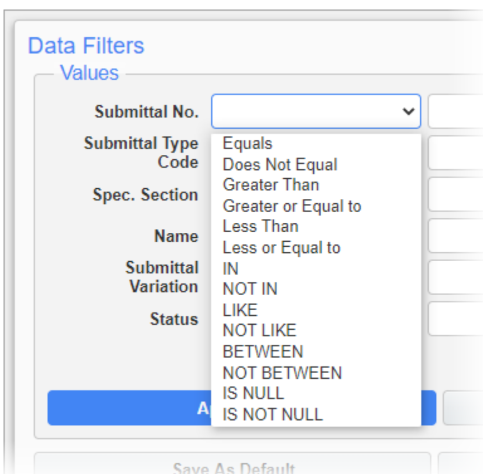
Select the RFIs or Submittals button in the navigation bar on the left side of the screen to pull up a list of all RFIs or Submittals. To find specific RFIs or Submittals, sort the list by selecting the Show Filter button at the top, right of the screen.



This will pull up a list of fields used for filtering searches. Each field that appears corresponds to a column of the log. Two fields appear next to each column title. The drop-down field can be used to select an operator (equals, less than, etc.) and the other to enter the value or filter term.

Using the two fields available, enter the operator and value to sort data.

Operator: Select the drop-down arrow next to the field to sort. A list of parameters appear for filtering:

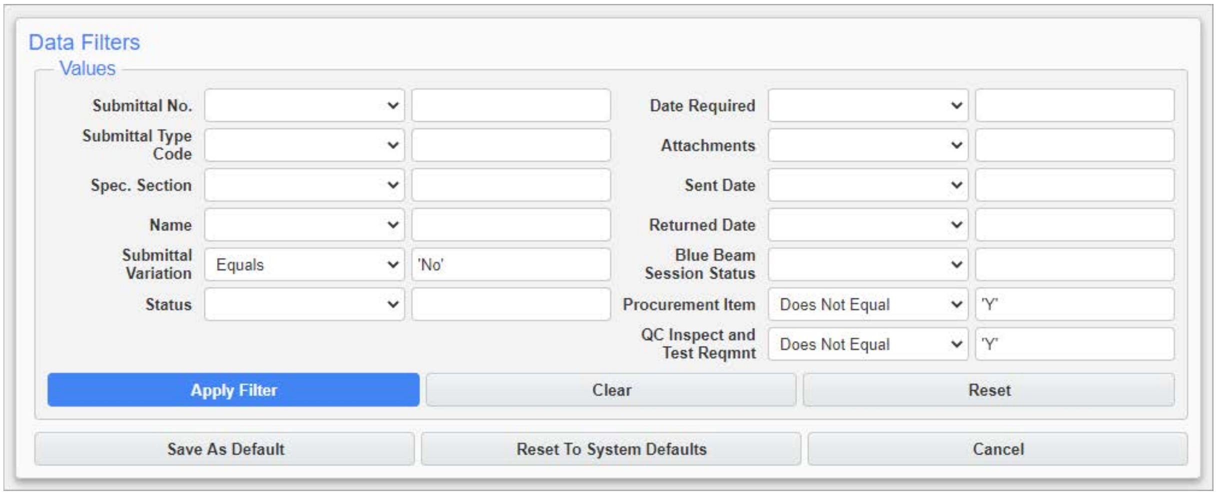


The table below provides additional details on the operator symbols (parameters) and meanings.

Operator Symbol	Meaning
=	Equals
!=	Does 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

After selecting an operator in the first field, enter the value to filter in the second field and click [**Apply Filter**] button to return the filtered log screen.



To ensure correct filtering, enter the values to match the example value format that appears in light grey text in the field.

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.

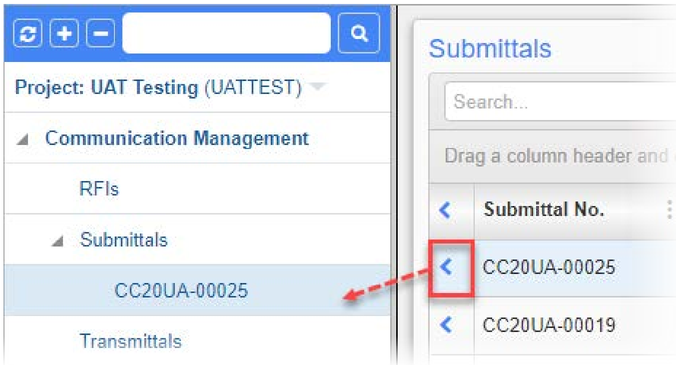
Press the [**Save As Default**] button to set the currently entered search terms as the default filter for this log screen. To clear any user-saved defaults and return to the original log screen, press the [**Reset To System Defaults**] button.

Press the [**Clear**] button to delete any entries made in the filter fields. Press the [**Reset**] button to reset the filters to the last-saved default.

3.2.5.4 Order and Filter Log Data Using Columns

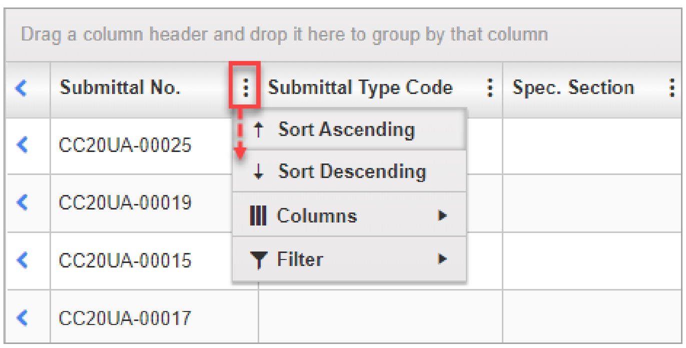
Aside from the Search field or [**Show Filter**] button the columns themselves can be used to order and filter log data.

Press the Less Than icon ( ) to reveal the corresponding record in the Treeview under the link for the current log screen.



Press the column heading once to sort the records by ascending order according to the selected column, twice to sort by descending order, and three times to not sort records by that column. The first two of these options are notated by the Ascending icon (↑) or Descending icon (↓) in the column header. The log screen may only be sorted by one column at a time, so sorting by the items in one column cancels any other applied column sorts.

Alternatively, press the Edit Column Settings icon (⋮) to show the menu in the screenshot below. Hover over the Columns menu item to select which columns appear on the screen. Hover over the Filter menu item to only show items of certain values in the column.



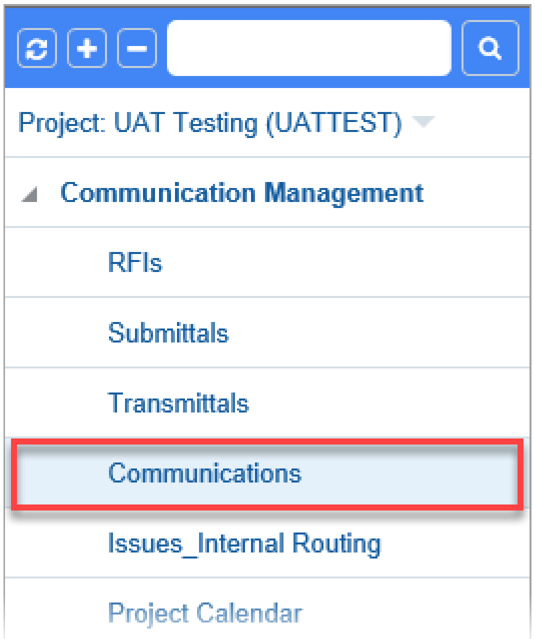
3.3 Communications and Issues/Internal Routing

3.3.1 Purpose

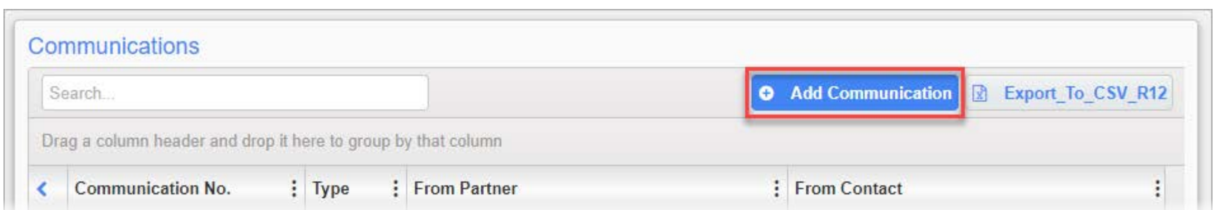
Communications and Issues_Internal Routing (also referred to as Issues), can be used to convey information or assign a task to a team member or stakeholder. Using these applications will allow information, reminders, and task deadlines to show up on the recipient's Project Calendar and My Actions list.

3.3.2 Adding a New Communication

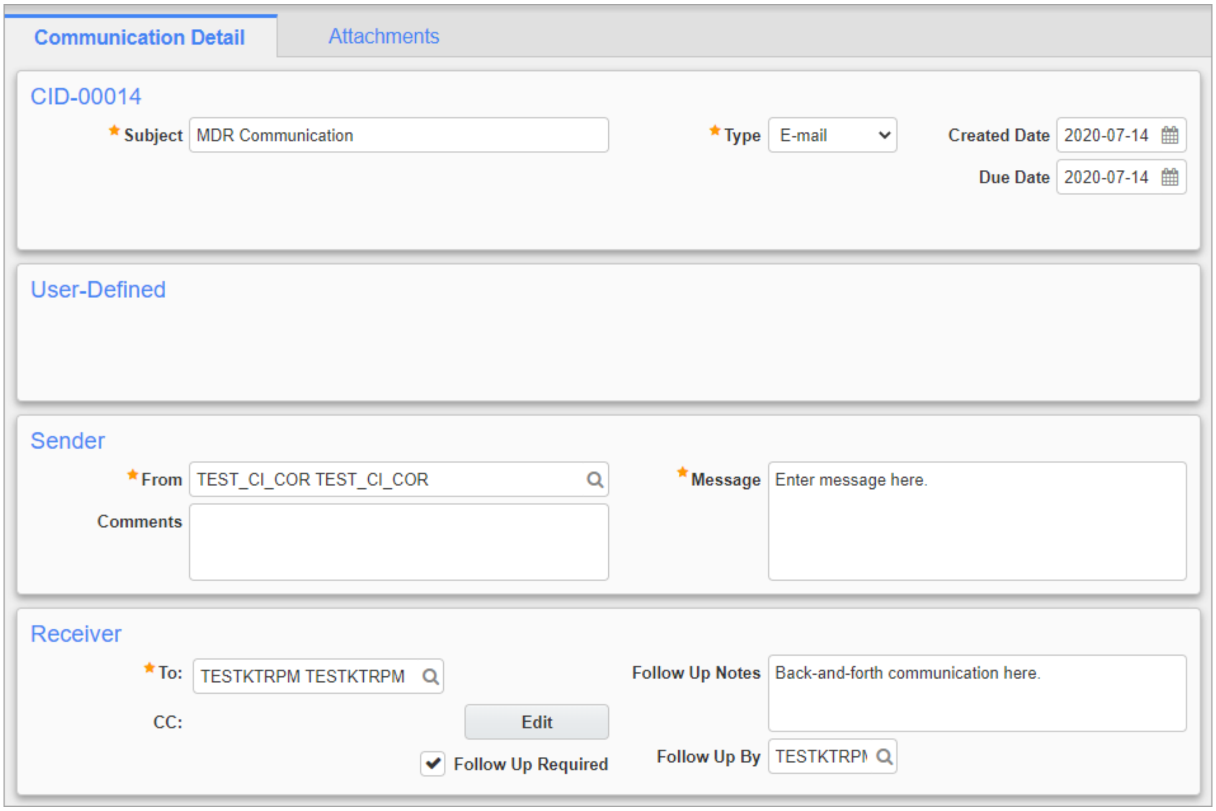
There are two ways to create a Communication record. Enter the Communication directly through the Navigation Pane or use the Related Objects tab on any application. Starting in the Navigation Pane of the relevant project, open the Communications folder.



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



Complete the required fields in the Communication Detail tab.



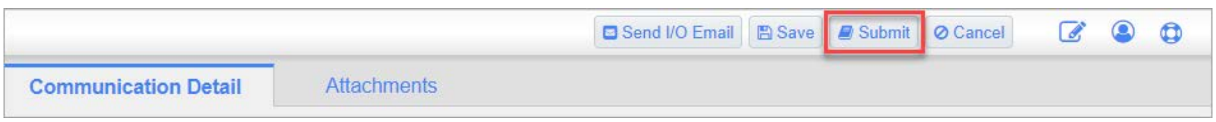
Below is a brief description of each field:

- **Communication No.**: This field generates a number automatically to organize Communications.
- **Subject:** Enter a short, descriptive title to give a synopsis of the message.
- **Type**: Select whether the communication is through e-mail, memo to file, face-to-face, telephone, web collaboration, or other.
- **Created Date**: Using the calendar icon ( ) next to this field, select the date the communication was created.
- **Due Date**: Using the calendar icon next to this field, select the deadline that the recipient must respond.
- **From**: This field will contain the sender's name It will default to the logged-in user.
- **Message**: Enter the content of the communication.
- **Comments**: Enter any comments concerning the communication. The person responding can provide their feedback here.
- **To**: Enter/select the team member to receive this Communication.

- **CC**: Use the [**Edit**] button to copy additional people into the message. They will not be able to respond, but they can view all comments. When finished, click [**OK**].

- **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** - Checkbox: Check this box if a response is required from the recipient. If it is for informational purposes only, this can be left blank.
- **Follow-Up By**: The person responding to the communication can use this field to list their name here when responding. If someone else provided the answer, they can list them here.

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

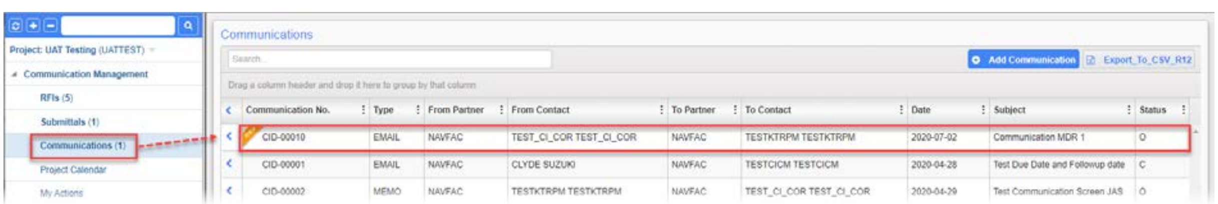


This will send the Communication to the recipient and add the due date to their My Actions and Calendar.

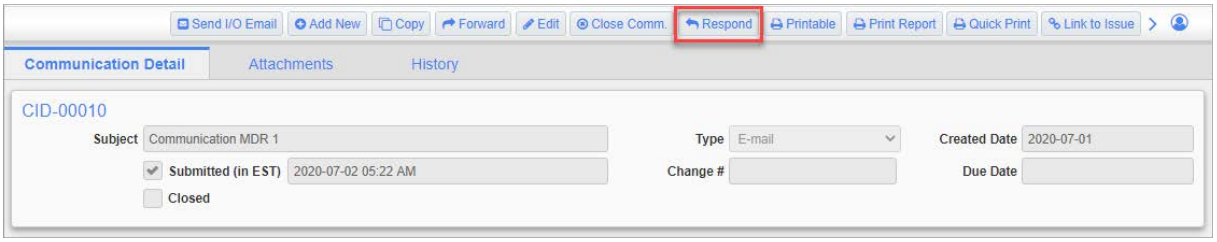
To add a Communication through the Related Objects tab of an application, see Section *3.2.3.2 Adding Related Objects* and select Communication. Then follow the instructions in this section.

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.

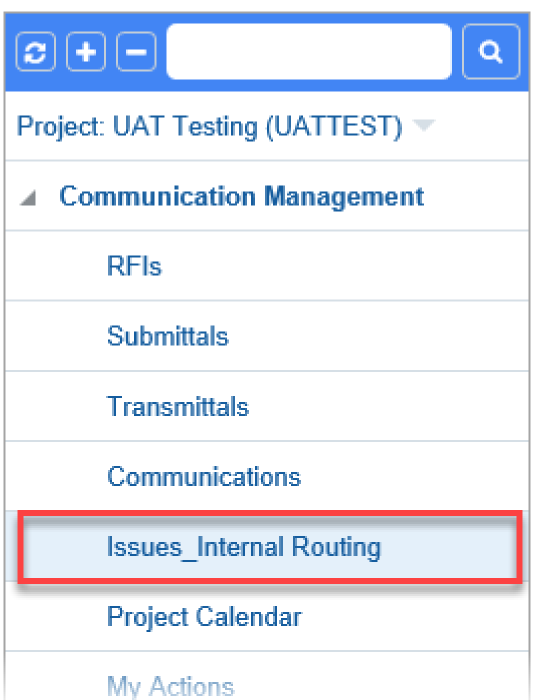


A small box will appear at the bottom of the screen for the recipient to add their response.

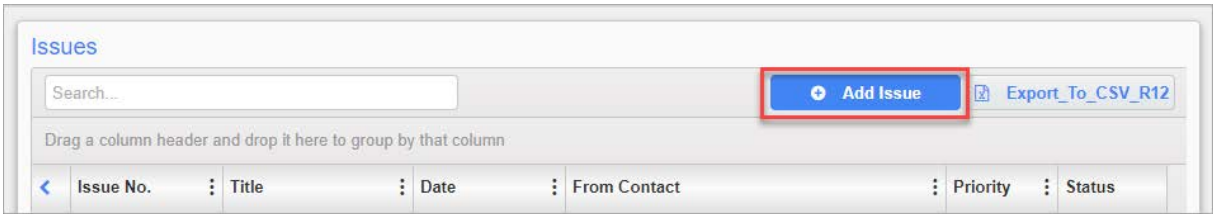
After the response has been added, click [**Submit**] in the top, right of the screen.

3.3.4 Adding Issues_Internal Routing

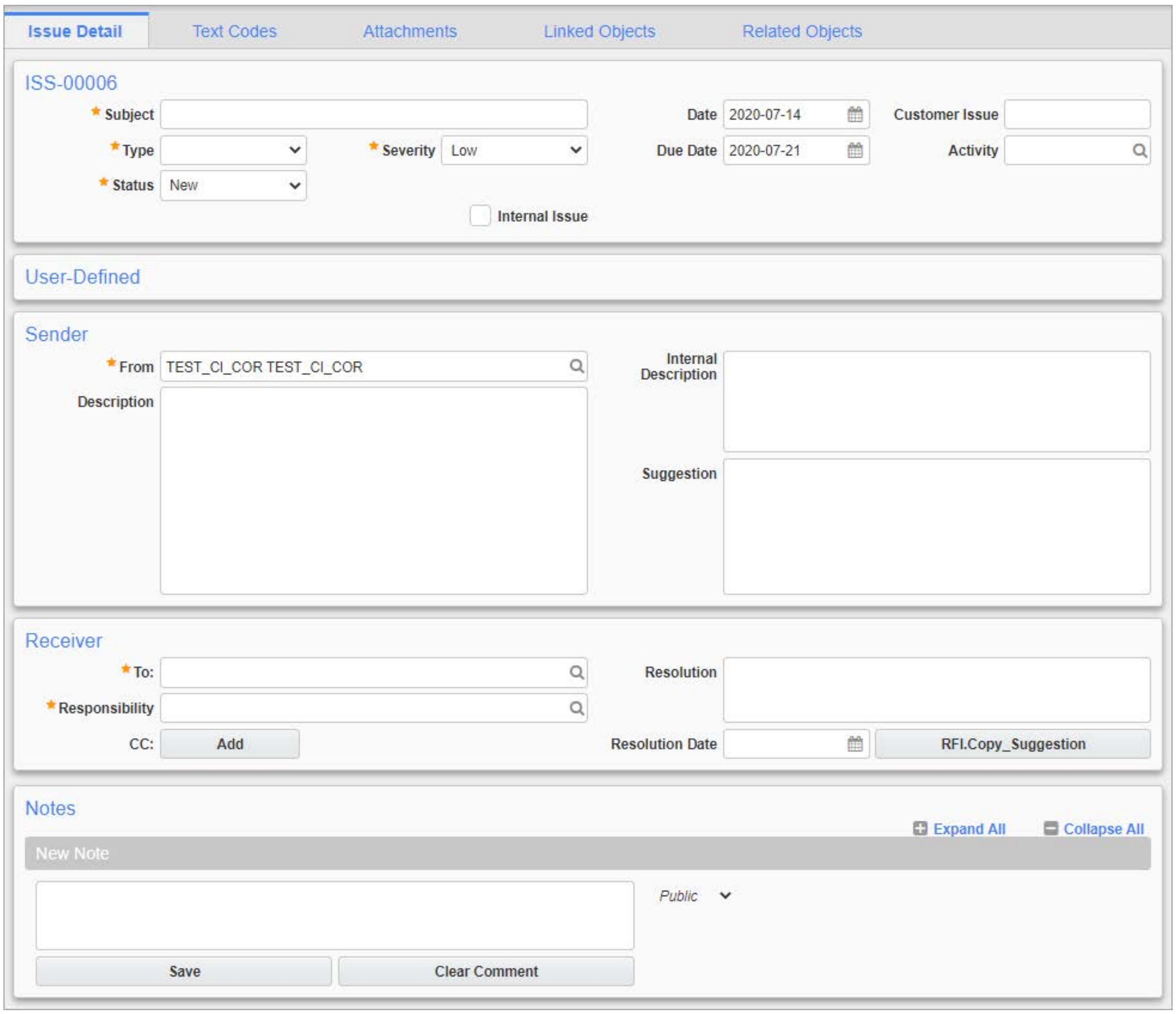
Issues/Internal Routing (IR) can be used to document potential problems that may result in a project change, to communication technical information or reports, and to link concerns to specific RFIs or Submittals. There are two ways to create an IR record. Enter the IR directly through the Navigation 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 issues regarding this RFI. At the top, right of the screen, select [**Add Issue**].



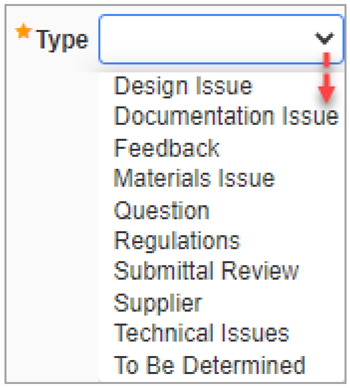
In the Issue Detail tab, complete the required fields.



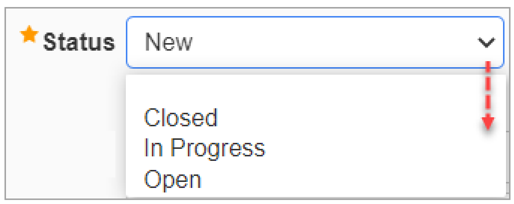
Below is a brief description of each field:

- **Issue No.**: This field generates a number automatically to organize IRs.
- **Subject**: Enter a short, descriptive title to give a synopsis of the message.

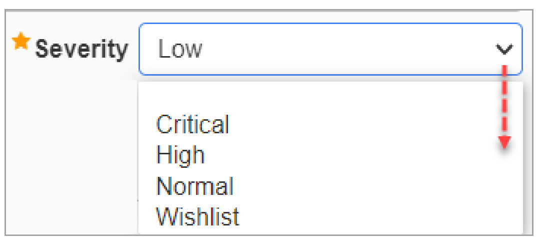
- **Type**: Using the drop-down, select the type that best describes the IR.



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



- **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.



- **Date**: The date the IR is created.
- **Due Date**: Using the calendar icon next to this field, select the response deadline for the recipient.
- **Customer Issue**: Leave this field blank.
- **Activity**: If applicable, select an Activity that the Issue is related to.
- **Internal Issue** – Checkbox: Check this box to if the issue is being reported internally.
- **From**: This field will contain the sender's name. It will default to the logged-in user.
- **Description**: Describe the IR issue and tasks.
- **Internal Description**: To be completed.
- **Suggestion**: Respondent to make suggestions in this field if IR is not ready to be resolved.
- **To**: Select the team member to receive this IR.

- **Responsibility:** Select the person responsible for managing this IR task.
- **CC:** Use the [**Add**] button to copy additional people into the message. They are unable to respond but can view all comments. When finished, click [**OK**].

- **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.
- [**RFI.Copy_Suggestion**]: Press this button copy the entry made in the Suggestion field to the Resolution field.

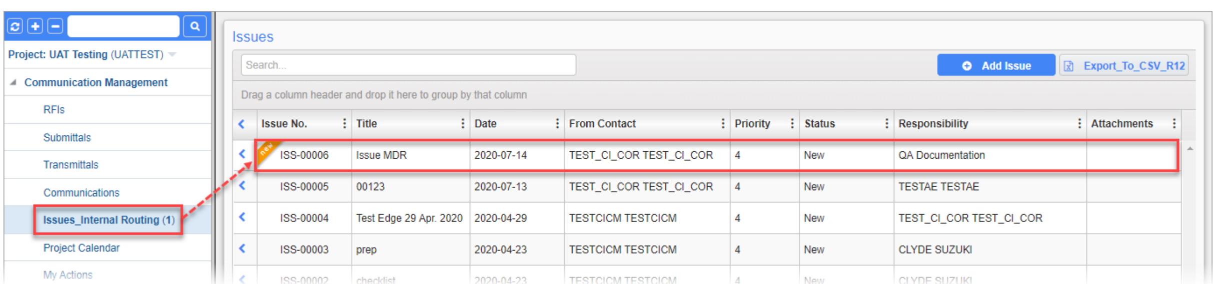
After completing all the required fields, if you need to save the IR as a draft, select [**Save**] on the upper-right corner. If the IR is ready to be submitted, click [**Submit**].

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 Adding Related Objects* and select Issue. Then follow the instructions in this section.

3.3.4.1 Responding to Internal Routing Requests

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 scrolling to the bottom of the screen and adding a response in the Notes section.

After the response has been added, click [**Save**].

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 IRs (See *Section 3.3.2 Adding a New Communication* for reference).

From here, see *Section 3.2.5 Sorting Data* for details on how to use each sorting method.

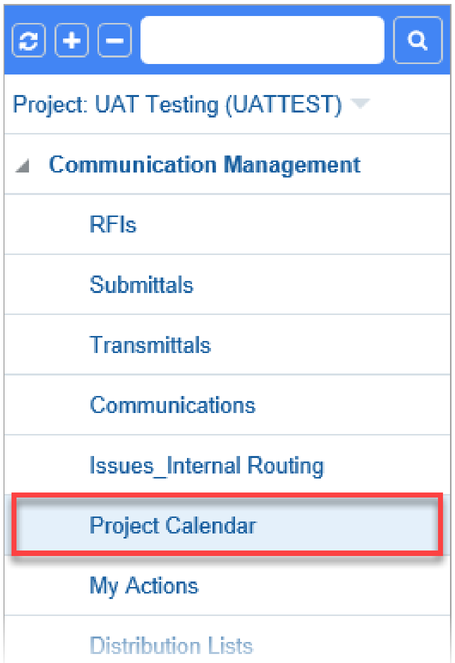
3.4 Project Calendar

3.4.1 Purpose

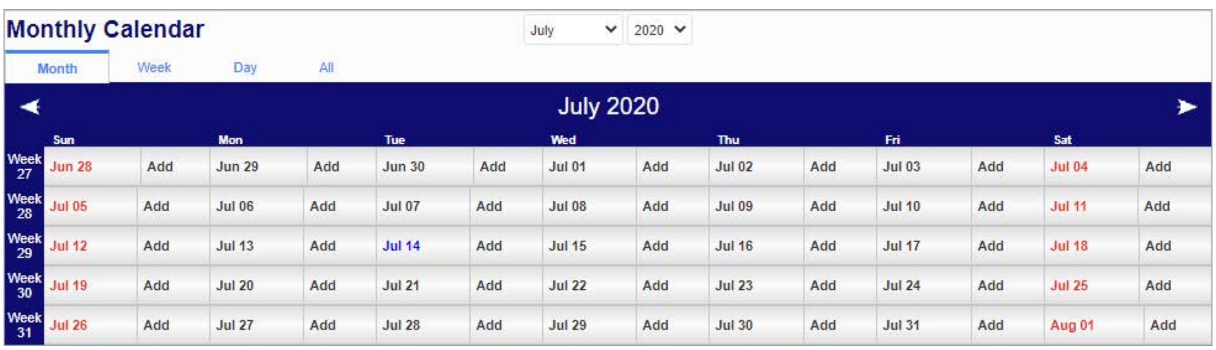
The Project Calendar is your resource for tracking the date RFIs and Submittals were received, their due date, and any Action Items or Issue requests received and due. This section will cover:

- 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.

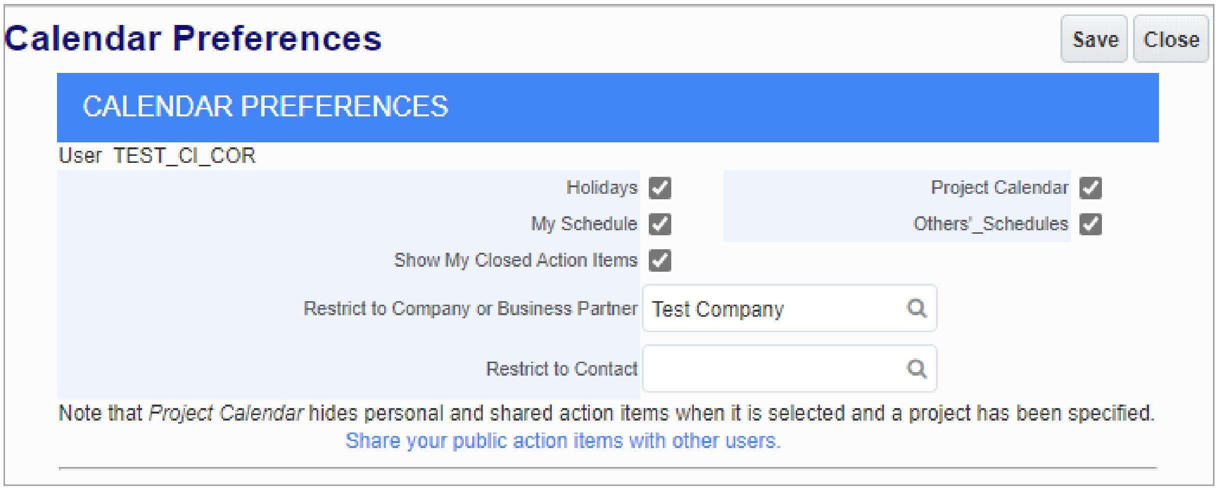


The Project Calendar for the current month will appear. Navigate between Month, Week, Day, and All views by selecting the tabs at the top of the Calendar.



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

A new pop-up will appear.



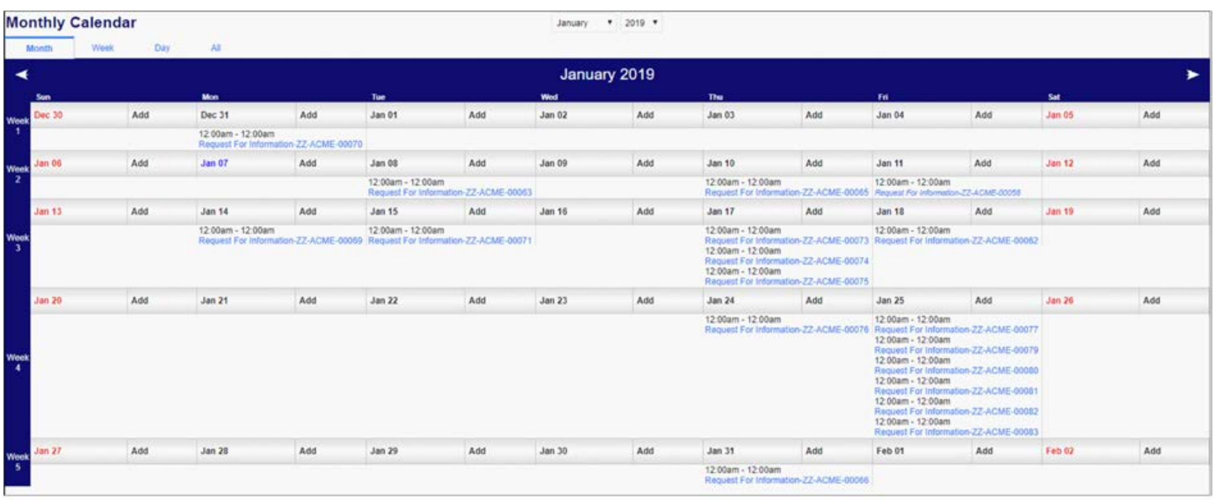
From this screen, users will be able to add holidays to their project calendar, see other team members' schedules, hide or view their own calendar or closed action items, and see the entire project calendar.

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 in the Restrict to Contact data field.

3.4.2 Adding Action Items to Calendar

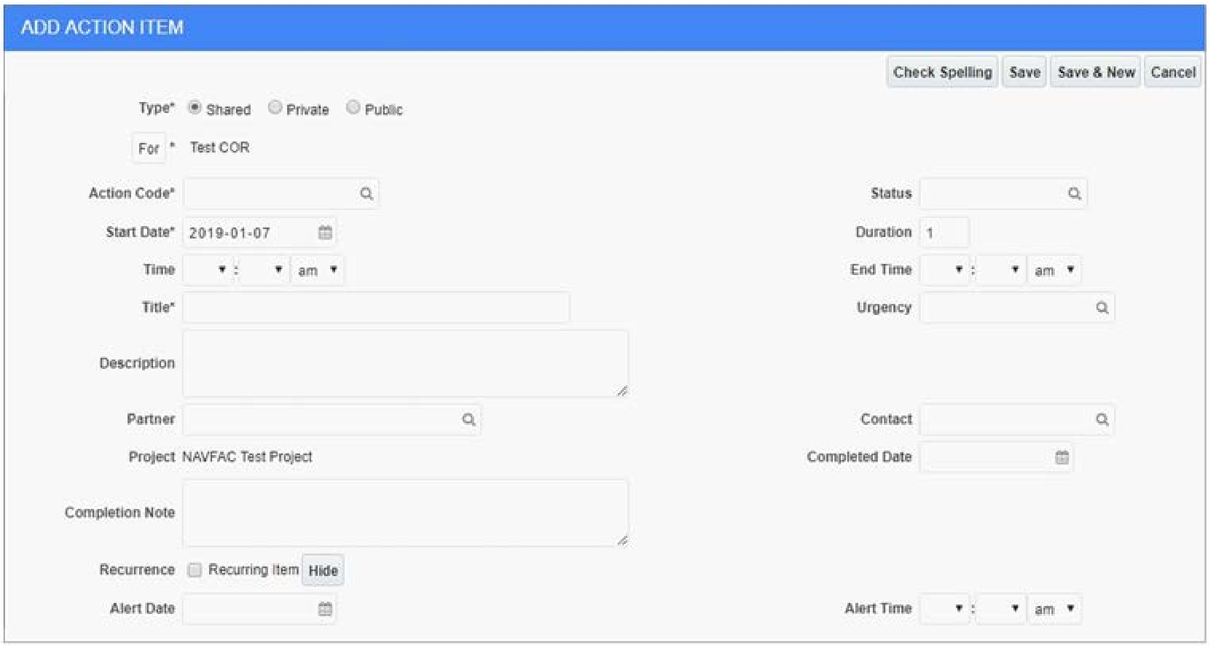
When a user creates an RFI, Submittal, Communication, or Issue, eCMS automatically adds the due date to the calendar of the person assigned to the task as shown in the example below.



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

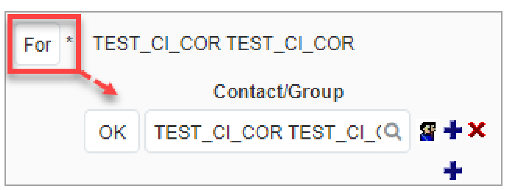
There is also a button for [**Outlook Import/Export**]. Currently, this functionality has been disabled and you will not be able to use this feature.

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



The fields in this pop-up window are described below.

- **Type**: Select the radio 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 drop-down 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 this field 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.

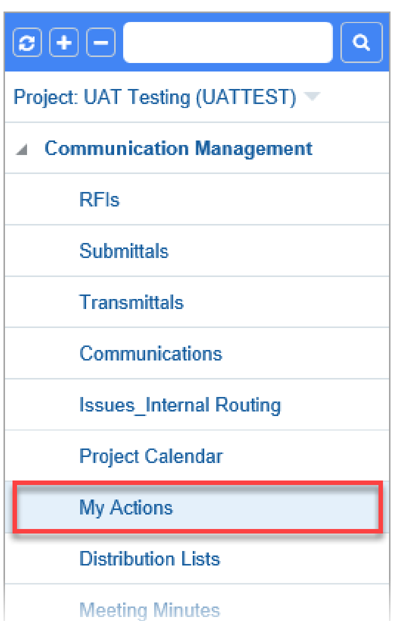
- **Recurrence**: Use this function to set up a recurring action item. When selected, additional fields will appear that allow the user to set daily, weekly, monthly, or yearly recurrence.
- **Alert Date**: Set an alert for the action item.
- **Status**: Use this field to select the status of the action item.
- **Duration**: This field is not required.
- **End Time**: Time when action item is completed.
- **Urgency**: Use this field to set the urgency of the action item. Your options are Deferred, High, Low, Ongoing, Pending, Urgent, or To Be Determined.
- **Contact**: Use this field 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.

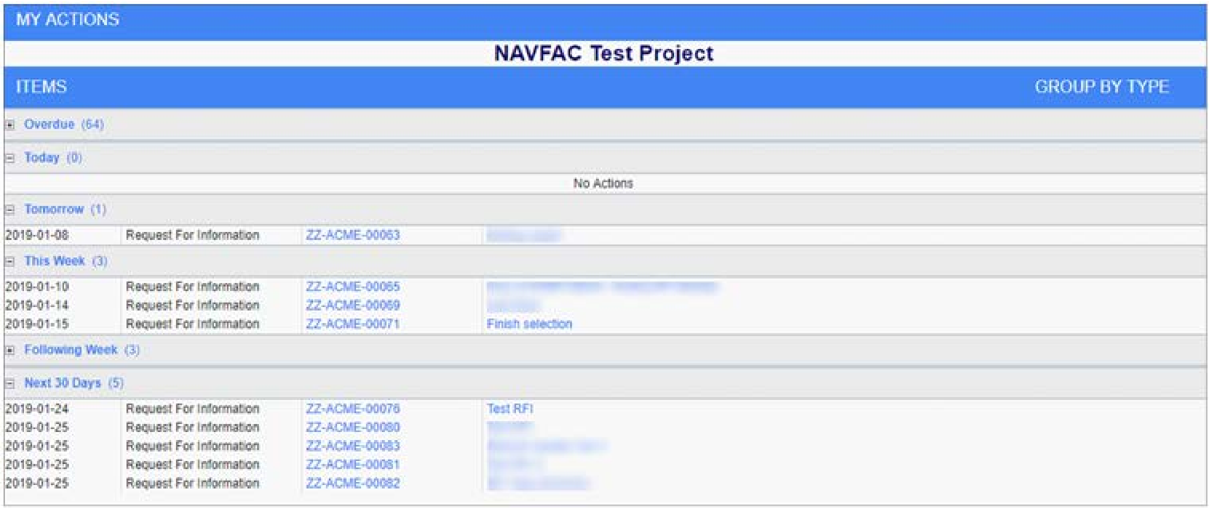
After completing the form, click [**Save**] in the top, right of the pop-up screen. The action item will now appear on the project calendar.

3.5 My Actions

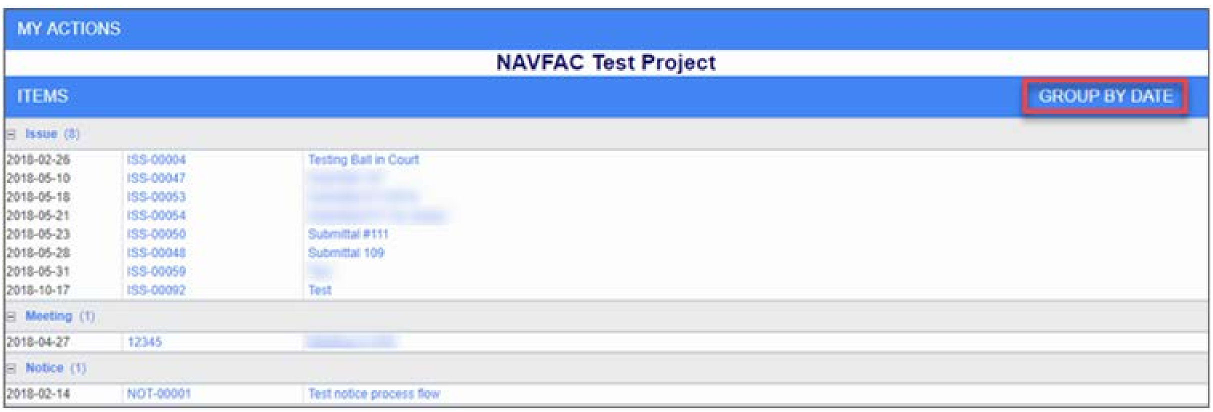
My Actions are a list of upcoming due dates for RFIs, Submittals, Action Items, Communications, and Issues or Internal Routing tasks. Find the My Actions section of a project under the Communication Management folder in the Navigation Pane on the left side of the screen.



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



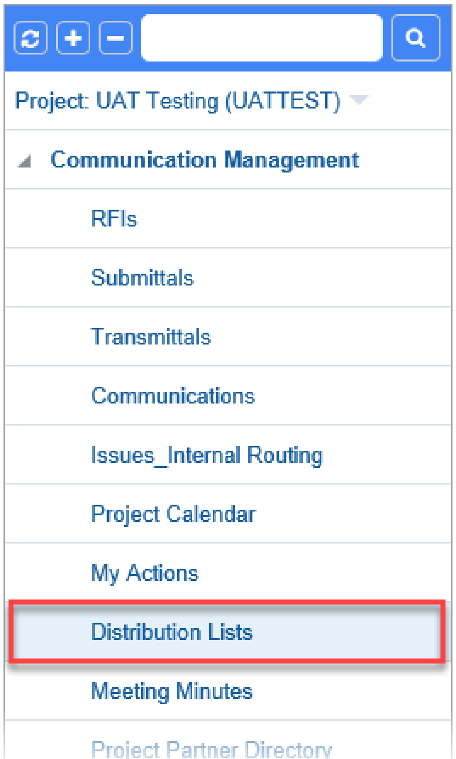
To view tasks by type, click on the “Group By Type” link on the header bar. The list will then be reorganized by date.



3.6 Distribution Lists

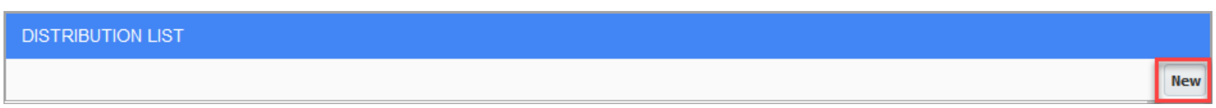
3.6.1 Purpose

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.

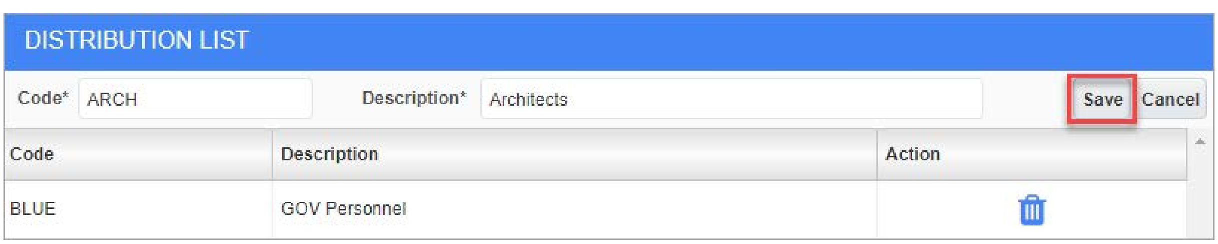


3.6.2 Creating a New Distribution List

Navigate to the Distribution Lists screen. In the right corner, select [**New**].

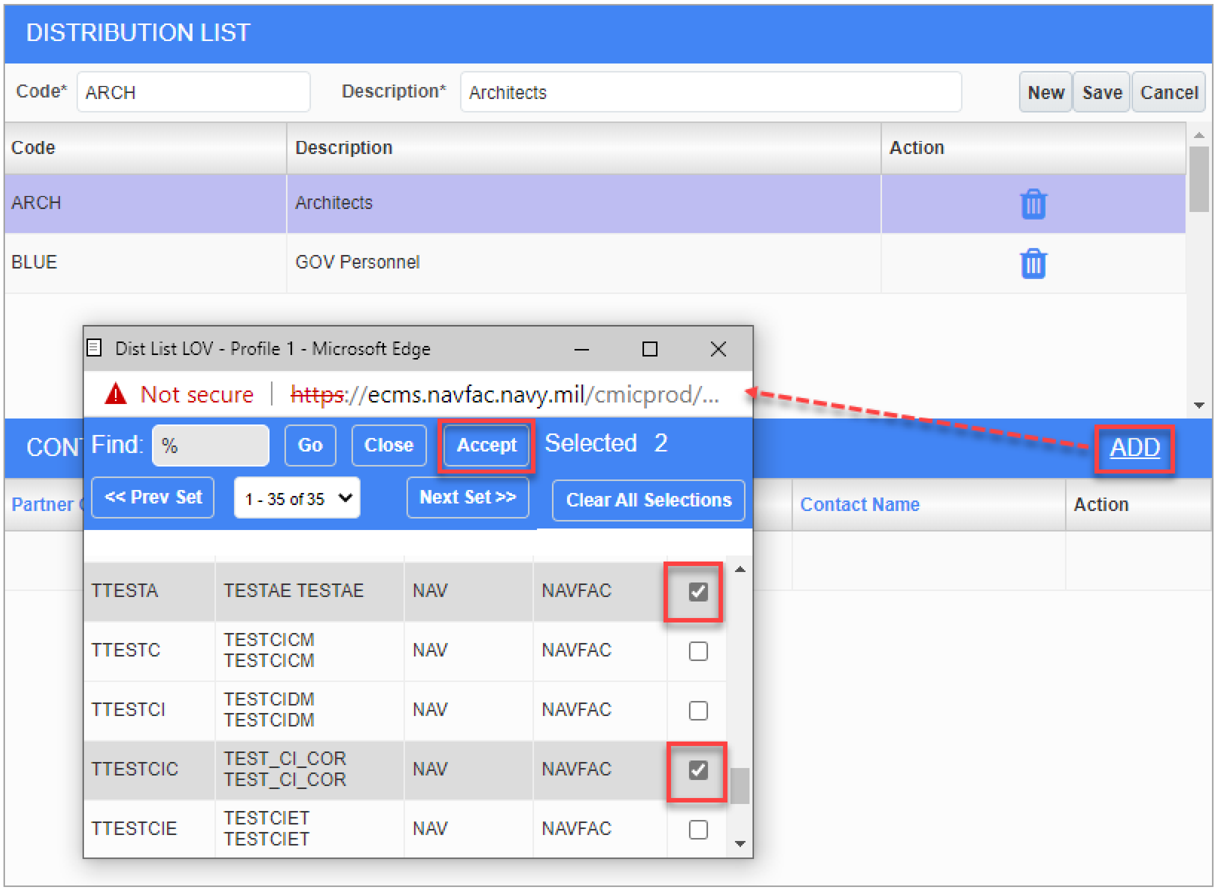


Create a Code and a Description for the new Distribution List. The Code should be short, and easy to understand. For instance, to create a Distribution List of Architects, the Code could be “ARCH” and the Description would be “Architects”. Click [**Save**].

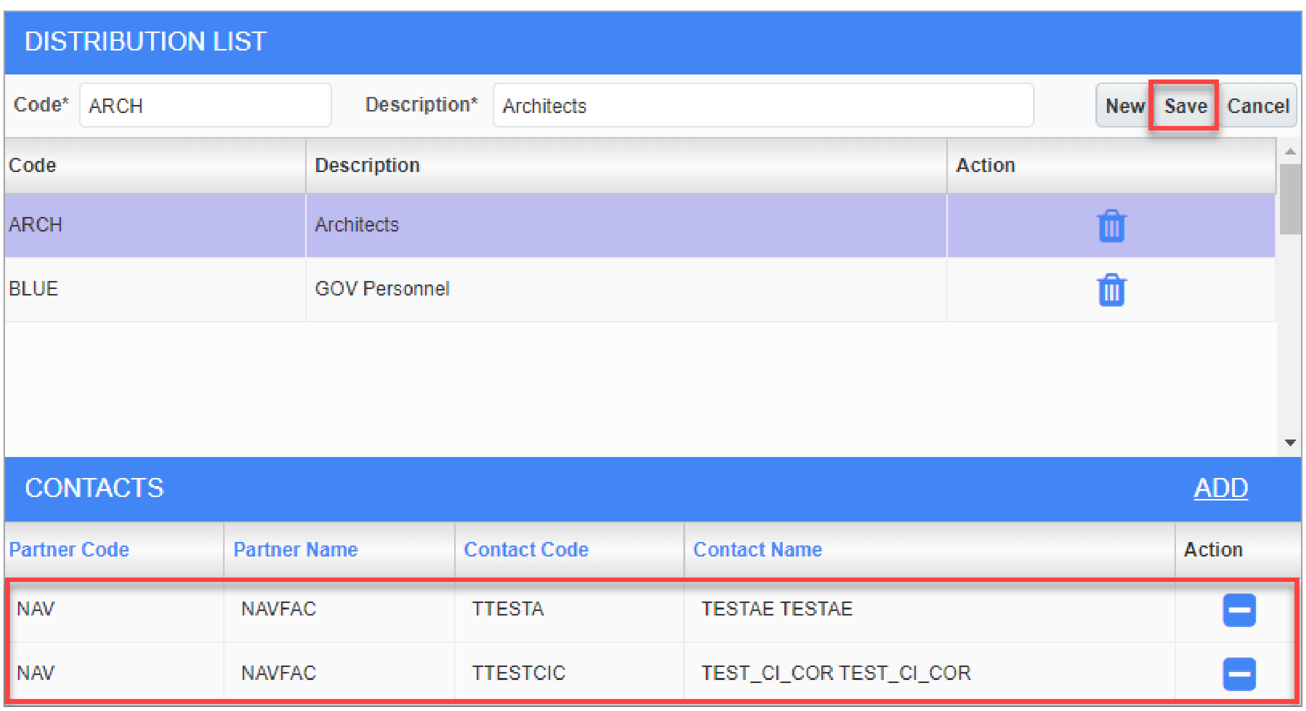


To add team members to a Distribution List, highlight the list and click Add in the Contacts section of the screen.

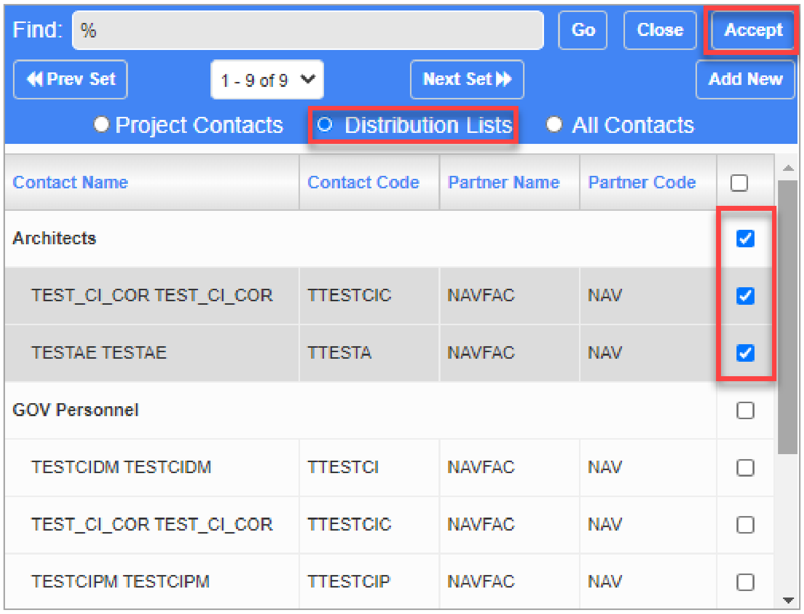
A pop-up will appear with a list of project team members. Select the team members that belong in the Distribution List by checking the box next to their name and selecting [**Accept**].



The team members will be added to the selected distribution list. When finished, click on [**Save**].



3.6.3 Using Distribution Lists within the System



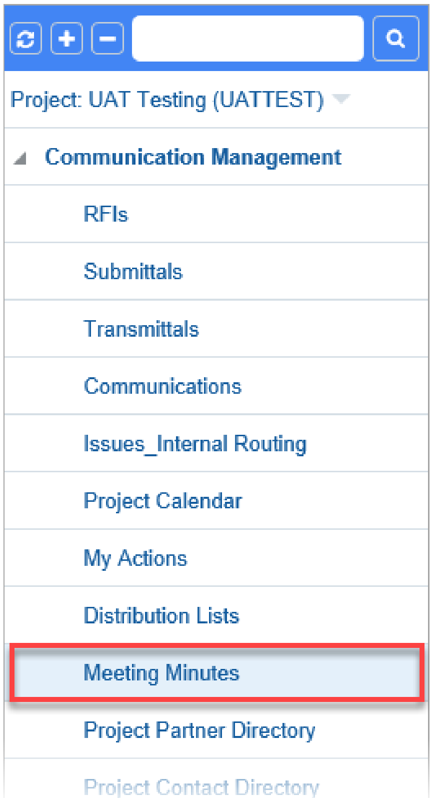
When accessing other sections of the eCMS system, such as RFIs, Communications, or Internal Routing, there is a CC section. When selecting a user to CC, select Distribution Lists.

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

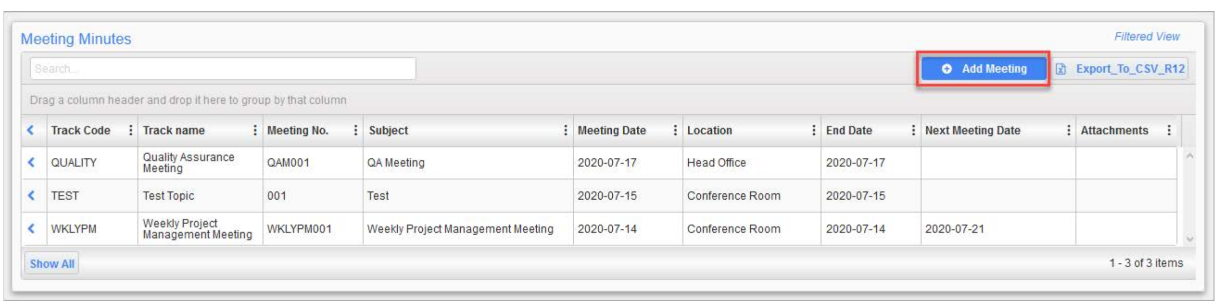
3.7.1 Purpose

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.



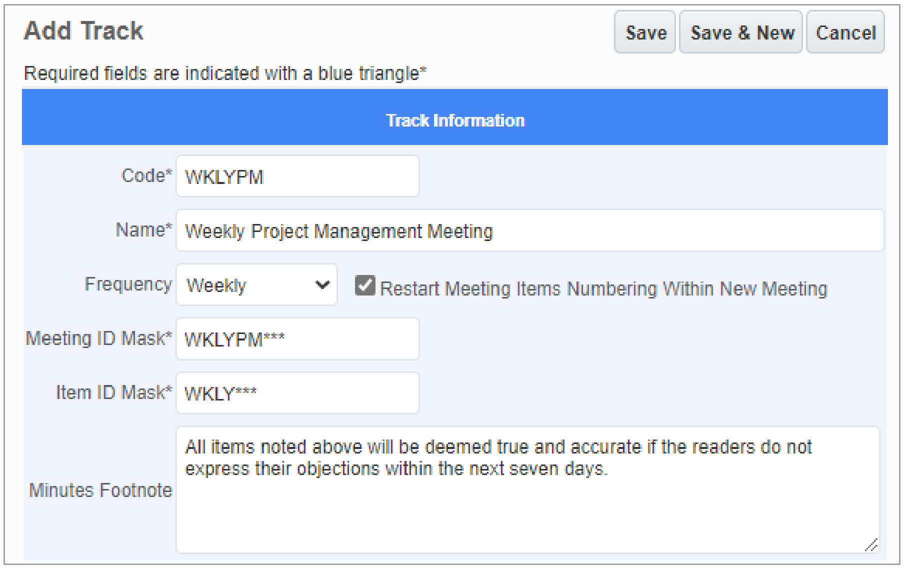
3.7.2 Add a Meeting

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.



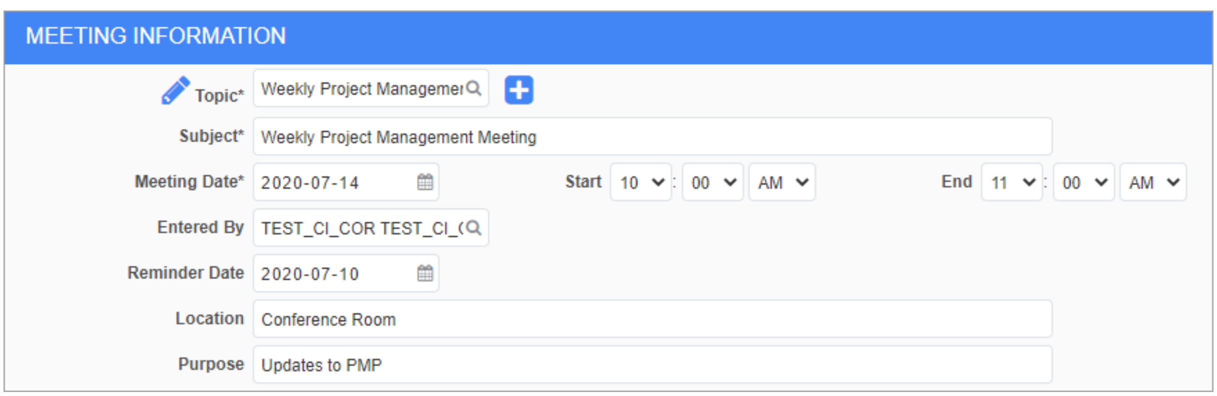
The first field you will see is Topic. Topics will vary by project and are the most logical groups to organize information. You can choose to use an existing "Topic" or create a new one. If this is the first time scheduling a meeting on the project, you will most likely have to create new topics. Choose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

If you choose to add a topic, a new pop-up 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. Enter a mask for the meeting number and the meeting items numbers. For example, SF*** would create meeting numbers of SF001, SF002, etc. Indicate if you want to restart meeting items from the number 1 for each new meeting. After completing all fields, click [**Save**].



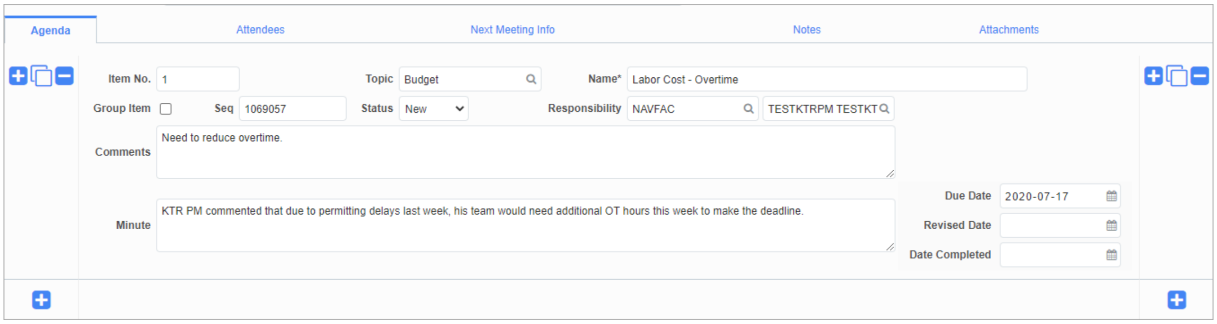
You can now select the topic you just created in the Topic field. You can then create a Subject for the meetings, set the start date and times, schedule a reminder to go out to attendees, and write the location and purpose of the meeting. [**Save**] the Meeting if you are ready to add attendees, or [**Save 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.

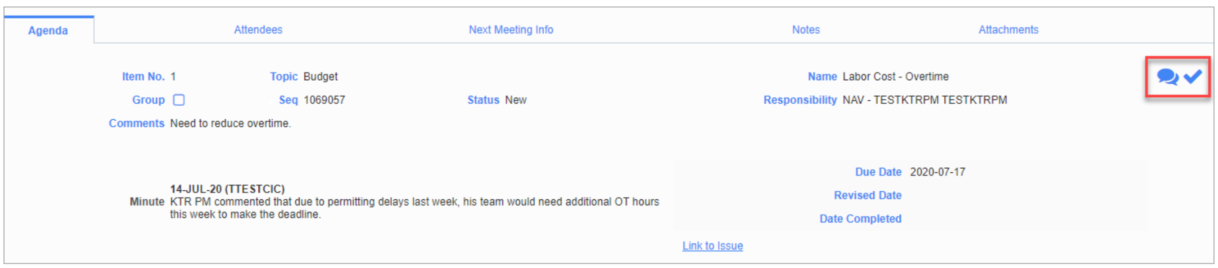


3.7.3 Agenda

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.

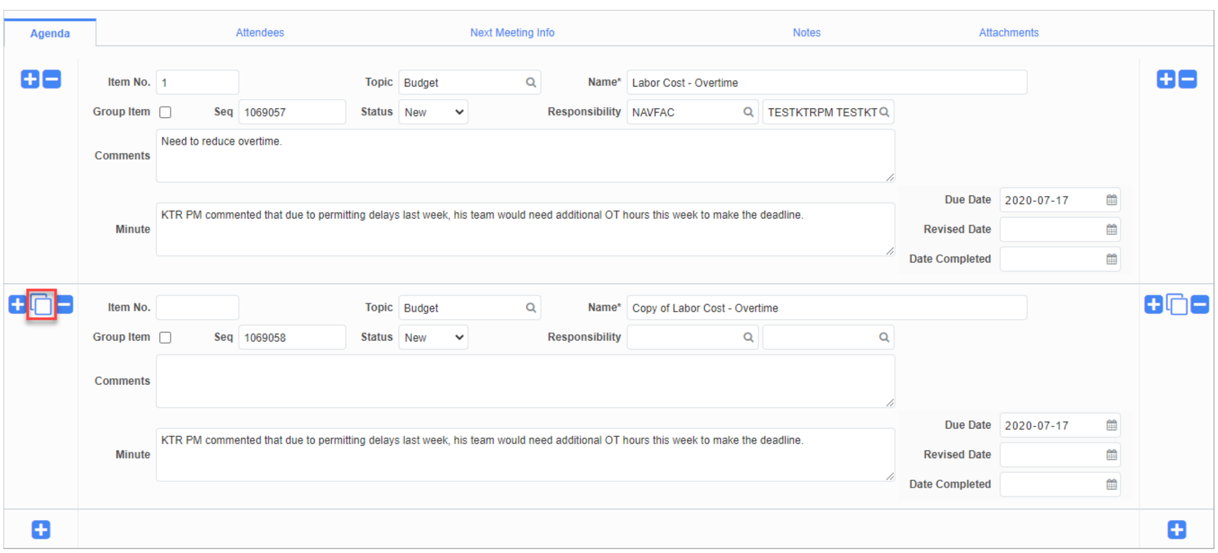


Click [**Save**]. If you want to add a note to an agenda item, or mark an item as complete, you can do that with the icons that appear on the side of the item.



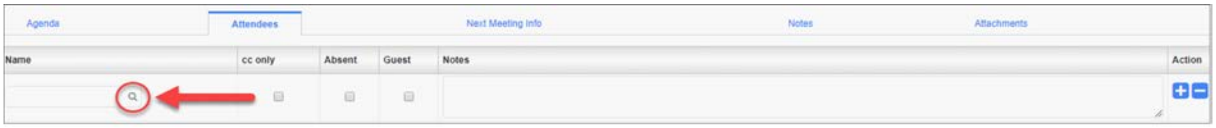
3.7.3.1 *Copy Agenda Items*

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.

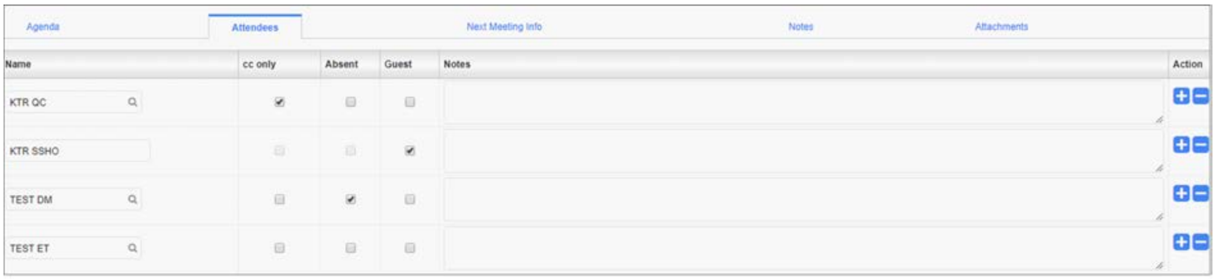


3.7.4 Add Attendees

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 Search icon under the Name column.

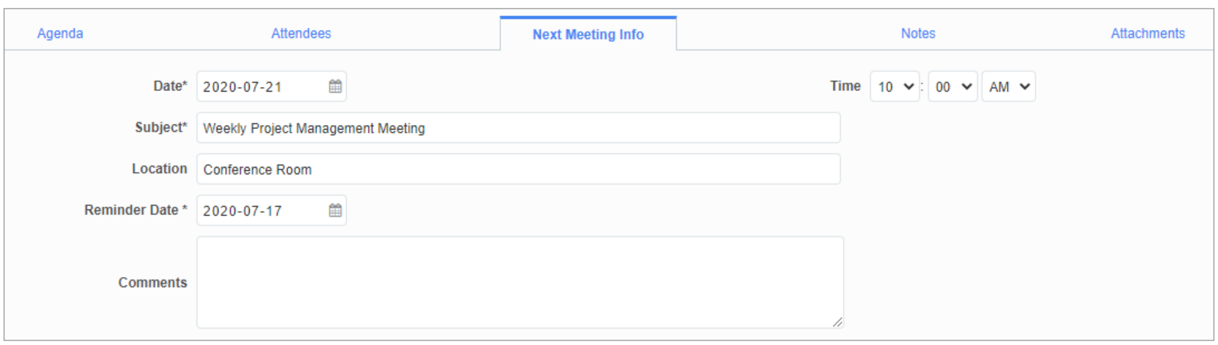


A pop-up will appear with everyone currently assigned to the project. Select the team members that attended or were invited to this meeting and click [**Accept**]. Finally, click [**Save**].



3.7.5 Next Meeting Info

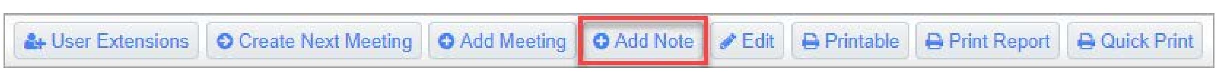
This section will display if a related meeting is scheduled. Click on the Next Meeting Info tab on the Meeting Detail screen.



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.

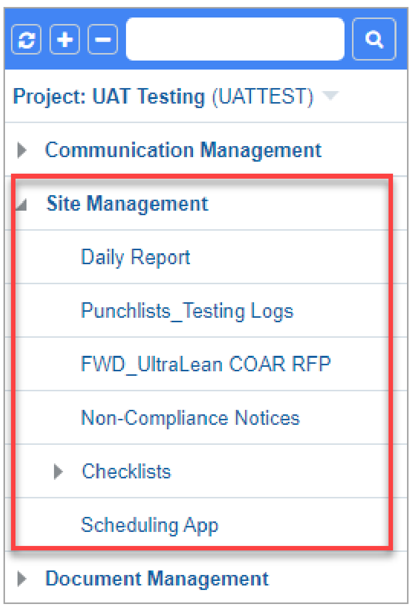
Once you have added all of the information to your meeting, click the [**Submit**] button at the top of the screen. You can return to this meeting at any time by using the Communications Management folder in the navigation pane.

4 Site Management

4.1 Background

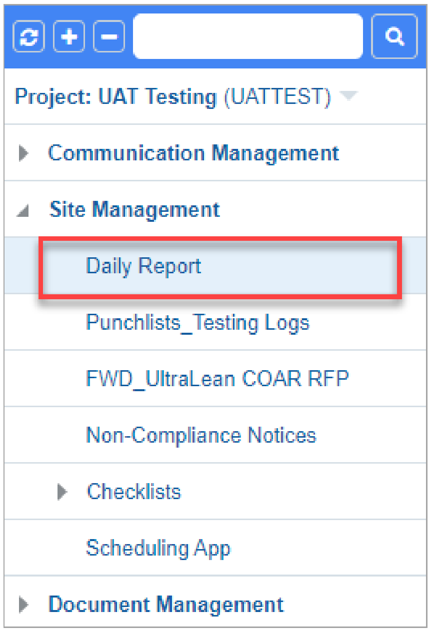
The Site Management section contains Daily Reports, Punchlists, and Checklists that serve as deliverables KTRs give to NAVFAC. Site Management also contains Non-Compliance Notices, which the government can issue to KTRs. These features allow KTRs to easily add, track, and update deliverables within the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

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

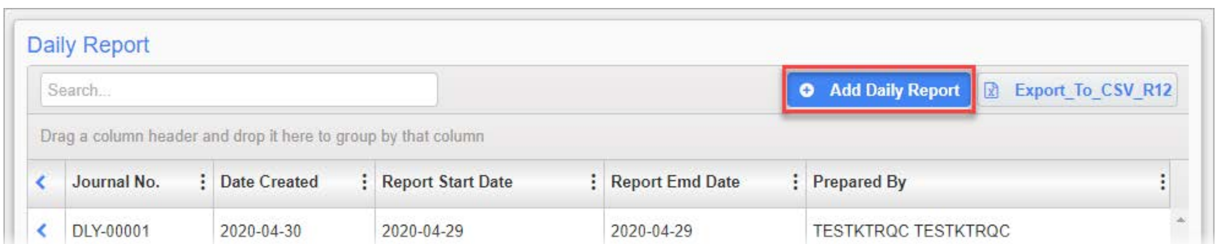


4.2 Daily Reports

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. The following section details how a Daily Report is created by the KTR.



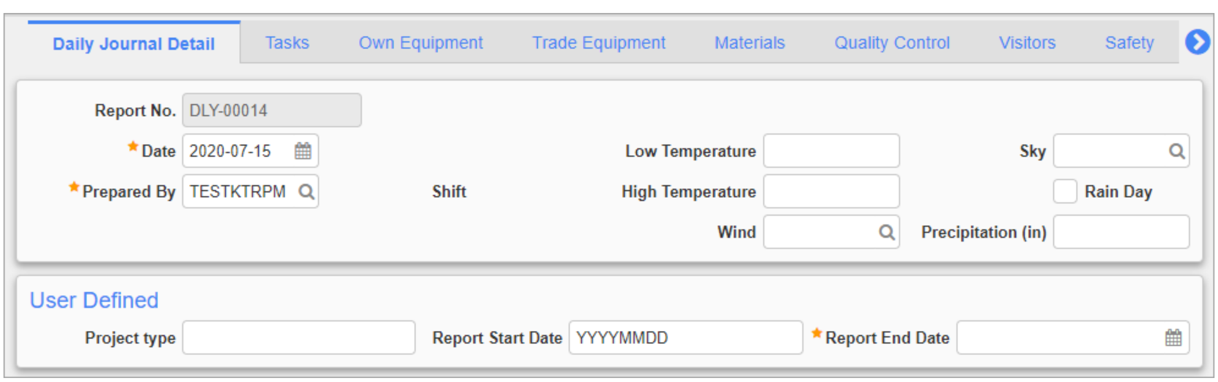
This will open a screen to start the Daily Report. It opens the Daily Report Log where you can view all Daily Reports submitted for this project. Click Add Daily Report from the top, right corner to create a new report.



4.2.1 Information in a Daily Report

4.2.1.1 Report Identifiers

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

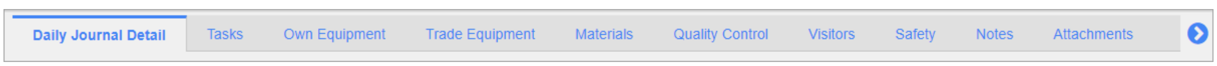


The fields in these sections are described below.

- **Report No.**: The Report No. is filled in automatically.
- **Date**: The Date prepared is also automatically filled in with the day the report is created.
- **Prepared By**: The Prepared By field shows the name of the user creating the report.
- **Low Temperature** (F): Enter the minimum temperature for the day.
- **High Temperature** (F): Enter the maximum temperature for the day.
- **Wind**: Use this field (Search icon) to select the wind conditions for the day.
- **Sky**: Use this field (Search icon) to select the sky conditions for the day.
- **Rain Day** - Checkbox: Check this box if there is rain.
- **Project Type**: Use the box in this field to type if this is a Construction Project (CON) or Facilities Services Project (FSC).
- **Report Start Date**: 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.
- **Report End Date**: If the report is created on the same day it is covering, just enter the date in this field.
- **Submitted By**: 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.



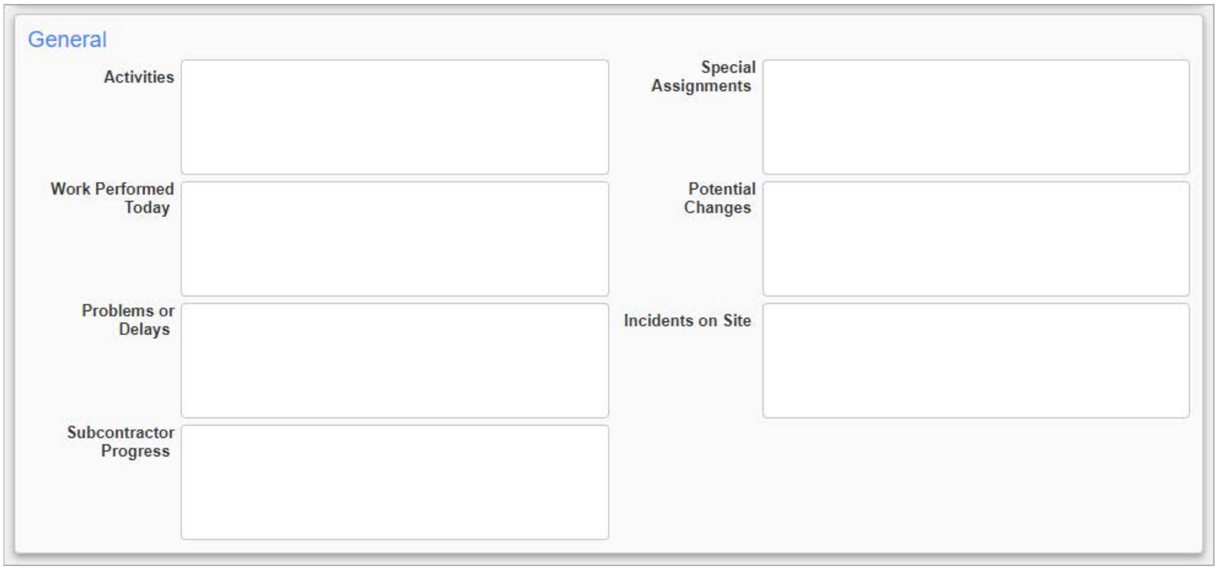
When selected, each tab will open a screen with different sections of a Daily Report. The fields in each screen can be completed at the office or in the field on a portable tablet device.

Click on the [**Edit**] button to begin adding details to tabs.

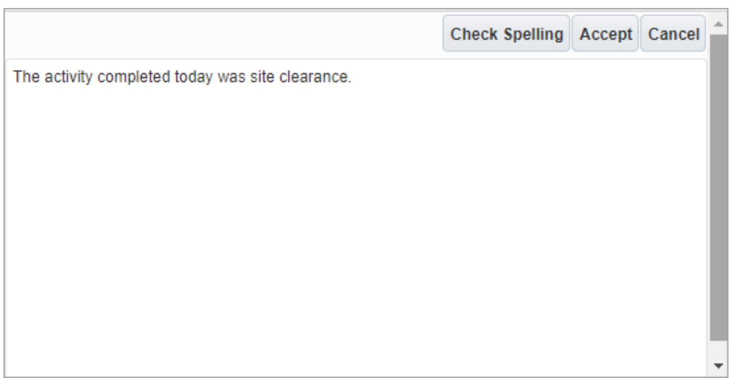
Daily Journal Detail Tab

The Daily Journal Detail tab contains a General section which provides 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.



Tasks Tab

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. The Trades field provides a list of trades to select the trade you are tracking hours for.

Tasks

Action	Company	Contractor/Employer	Trades
	NAVFAC	ABC Contractor	Carpenter

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.

Tasks

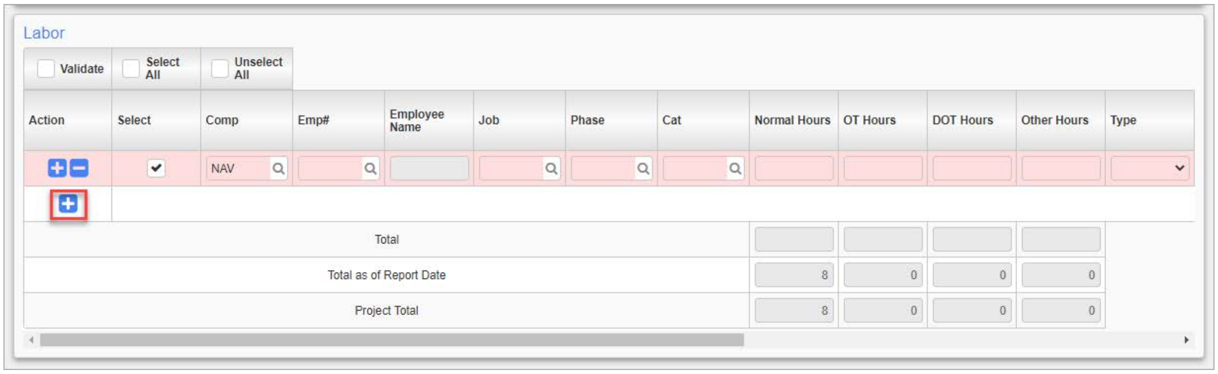
Action	Company	Contractor/Employer	Trades	Work Date	No. of Workers	Man-Hours	OT Hours	DOT Hours	Daily Man-Hours
	NAVFAC	ABC Contractor	Carpenter	07/14/2020	3	8	2		30
Total									
Total as of Report Date					17	32	0	0	136
Project Total					17	32	0	0	136

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

Activity Code	Notes	Action
	Additional Notes	

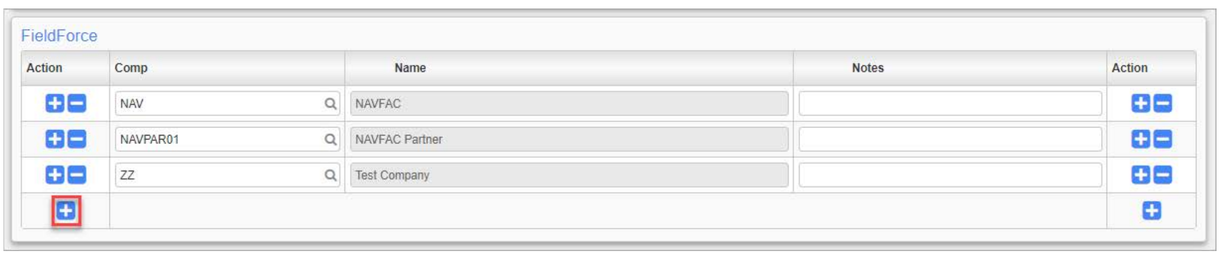
Labor Tab

This tab is used to record the hours worked by individual employees. To open a new line, click the blue plus sign under the Action column.



Field Force Tab

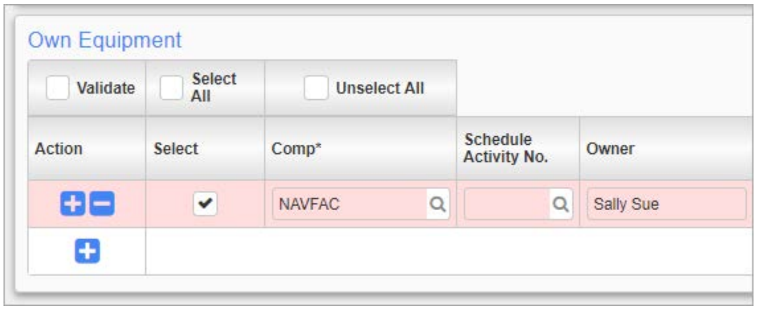
This tab allows for the recording of your own crews or subcontractor crews that worked on the job during the day. To open a new line, click the blue plus sign under the Action column.



Own Equipment Tab

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.

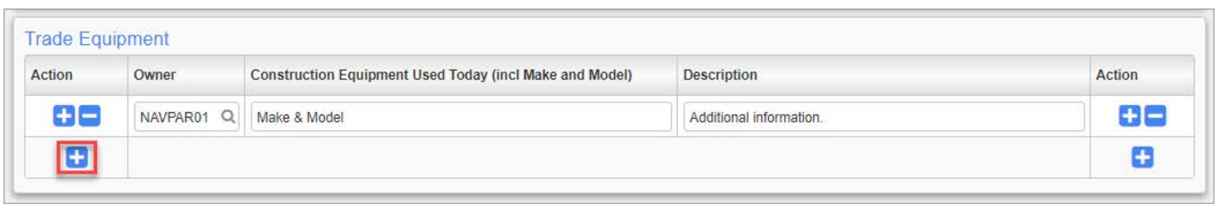
Enter your company in the Company field. If you imported the Schedule Activities with the baseline schedule in the Schedule App under Document Management, then you can use the Search icon to select an Activity Code for this work. Otherwise, leave this field blank. Enter the person responsible for the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



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.

Trade Equipment

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

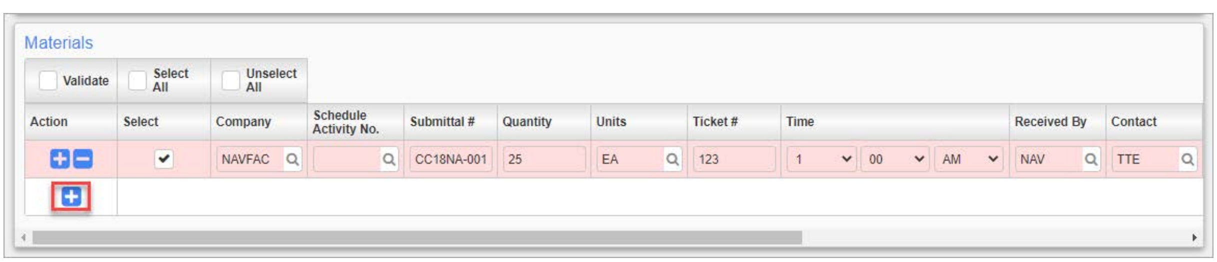


Enter the Subcontractor in the Owner field. Include the Equipment Make and Model.

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

Materials Tab

The Materials tab is for recording deliveries to the jobsite. Click the blue plus sign under the Action column to create a new line.

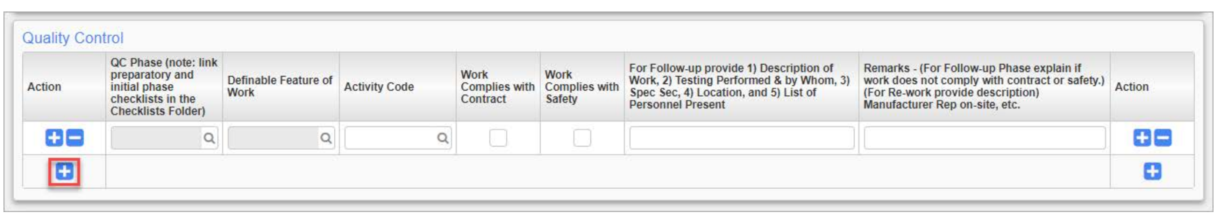


The fields in this tab are described below.

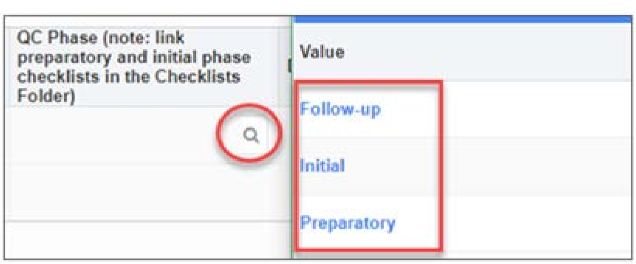
- **Company**: Use the Search icon to select the company. Choose NAVFAC if submitting on materials for the Navy, Subcontractor if discussing a subcontractor, or the KTR company if reporting for yourself.
- **Schedule Activity No.**: If you imported the Schedule Activities with the baseline schedule in the Schedule App under Document Management, then you can use the Search 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 Search 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 Search icon to select the company of the person who received the materials.
- **Contact**: Use the Search 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 Tab

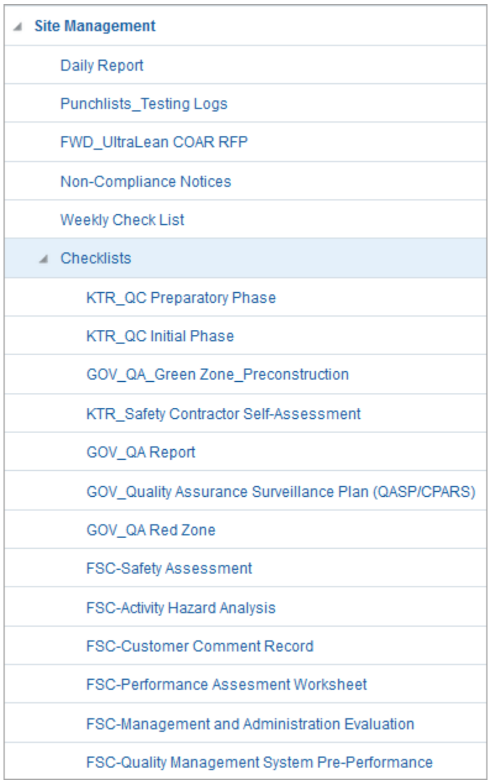
Under the Quality Control tab, click the blue plus sign under the Action column to create a new line.



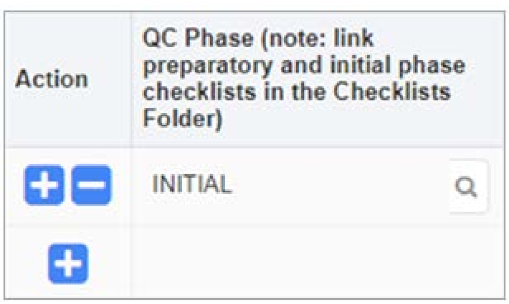
In the next column, QC Phase, select the Search icon to choose the type of checklist completed for this daily report.



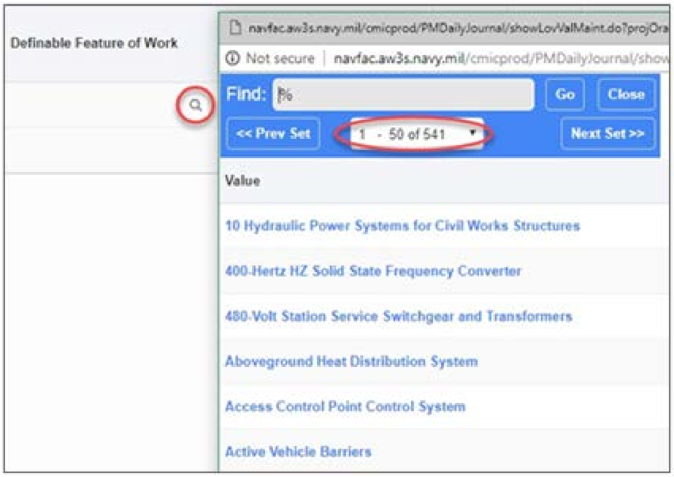
Checklists can be found in the Navigation Pane, under Site Management and then Checklists.



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.



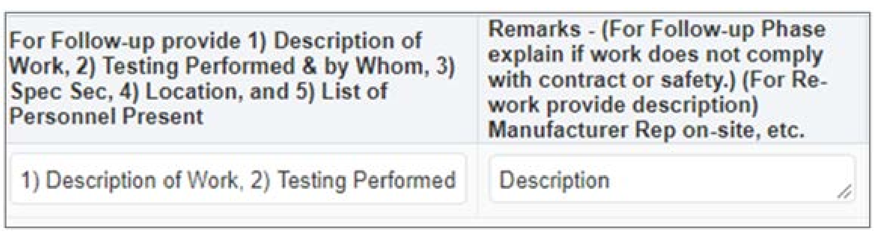
In the next column, use the Search icon to select the Definable Feature of Work. A pop-up will appear with a list of 541 Definable Features of Work.



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

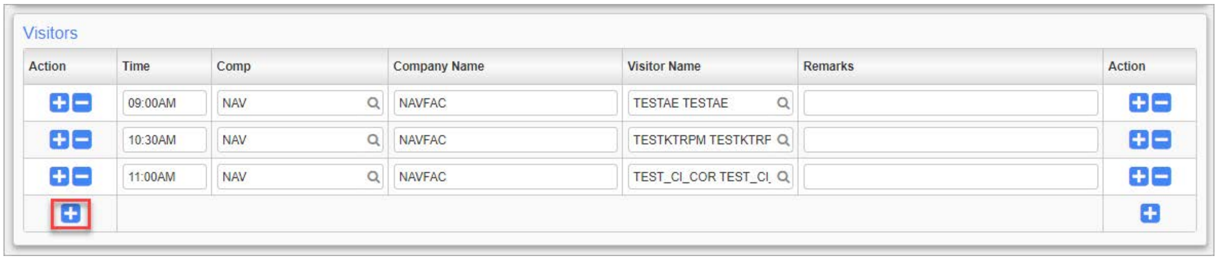
Check the boxes to indicate with the work reported in the Daily Report complied with the Contract and with Safety.

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.



Visitors Tab

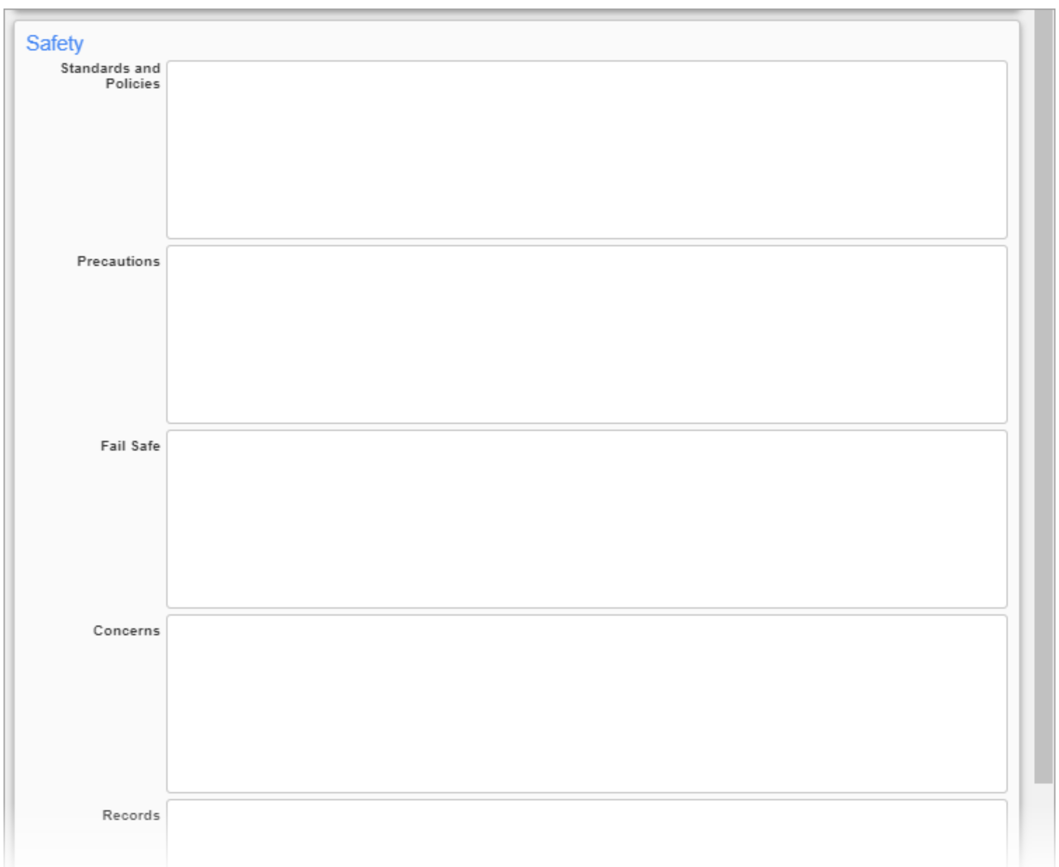
This tab is for recording who visited the site during the day, the time they arrived, and the reason for the visit. Click the blue plus sign under the Action column to create a new line.



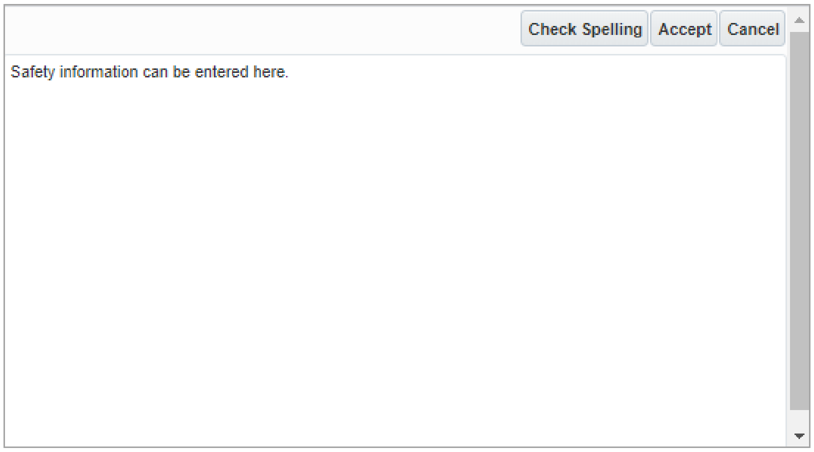
Safety Tab

The Safety tab is used to enter safety related incidents on site for the specified date. 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.



Billing Units Complete Tab

This tab automatically displays all lines of a contract that are defined with the billing type of UPHS – “Phase Unit Billing”. Each billing line will show the bill code, the bill code name, the billing weight measure, the contracted units, and previously invoiced (billed) units. There is one enterable field: the Today’s Units column.

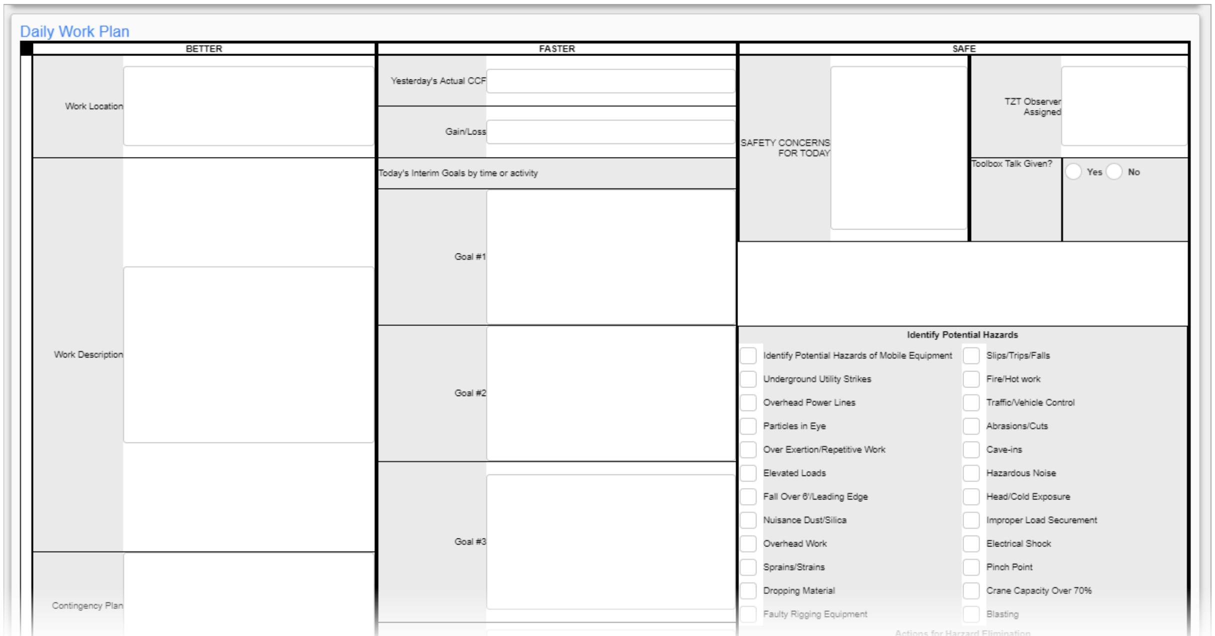
A Previously Submitted Units column has also been added to this tab. It is the total of the Today's Units column accumulated for daily journals prior to the current journal date, for SUBMITTED journals.

Units Complete Tab

This tab is used to track a job’s completed units. Phases are selected and then units completed against those phases can be tracked for the day.

Daily Work Plan Tab

This tab is used to enter a daily work plan for a specified work crew.



The Daily Work Plan uses the following acronyms:

- CCF: Crew Cost Factor
- TZT: Targeting Zero Together
- TCT: Traffic Control Technician
- TCS: Traffic Control Supervisor

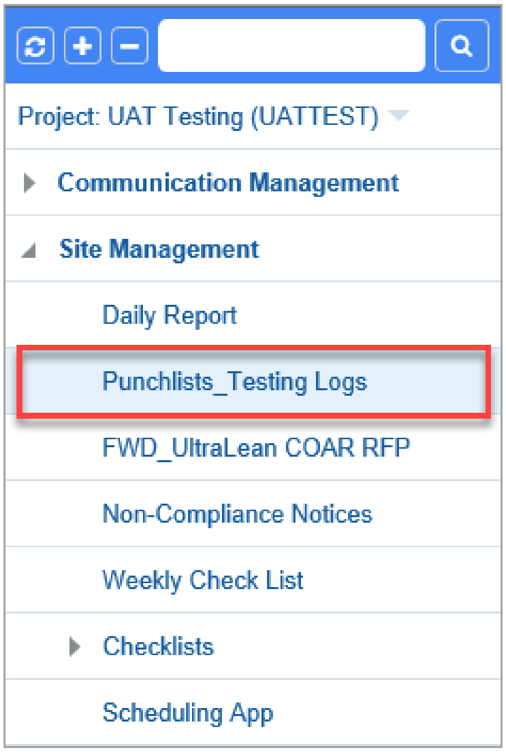
4.2.1.3 Copy Previous Reports

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

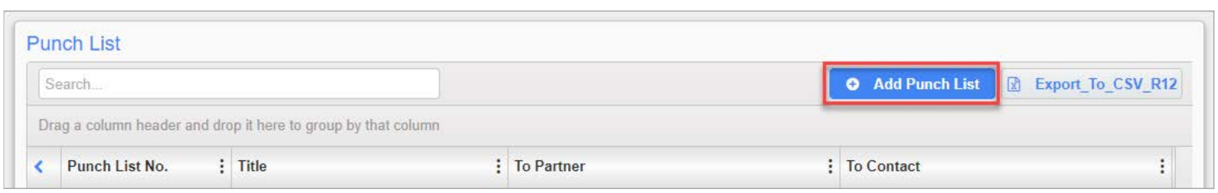
The Punchlists and Testing Logs allow KTRs to report any work that is incomplete or damaged near the end of a project. Punchlists and Testing Logs are in the Navigation Pane under the Site Management folder.



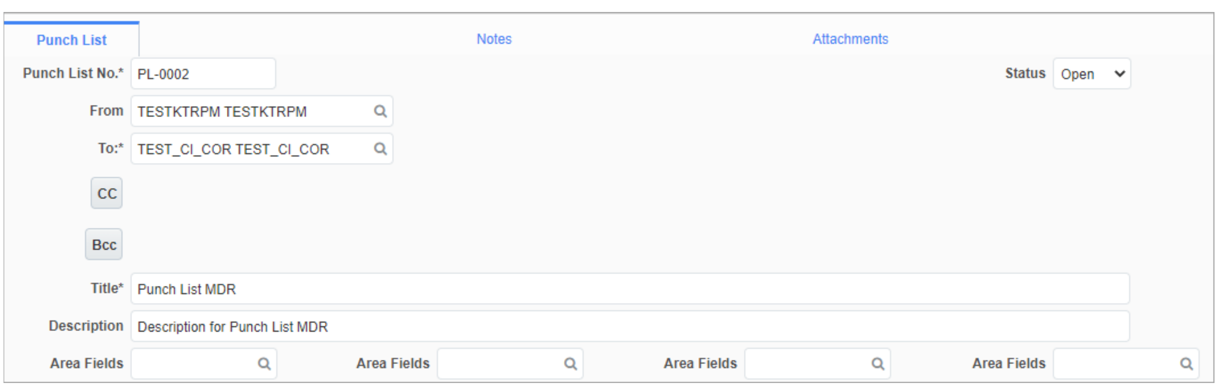
4.3.2 Adding a New Punchlist

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.



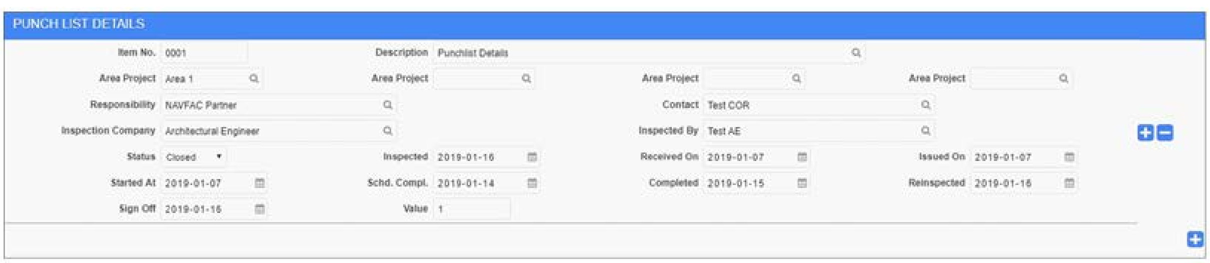
Below is a short description of each field.

- **Punchlist No.**: This is the auto- generated number of the Punchlist.
- **From**: This field indicates who sent the Punchlist.
- **To**: This field is used to select the receiver of the Punchlist.
- **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.
- **Area Fields**: Select the locations affected by the Punchlist.

The following describes the fields in the Punch List Details section of the screen. Click the blue plus sign to add more punch list details.



- **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.

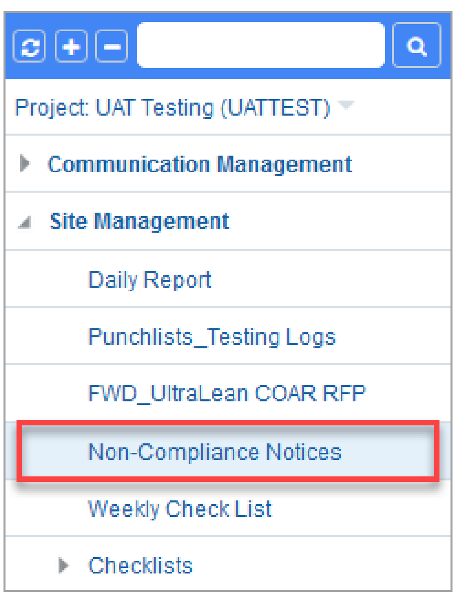
Once the Punchlist has been completed, select [**Submit**] in the upper-right hand corner.

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

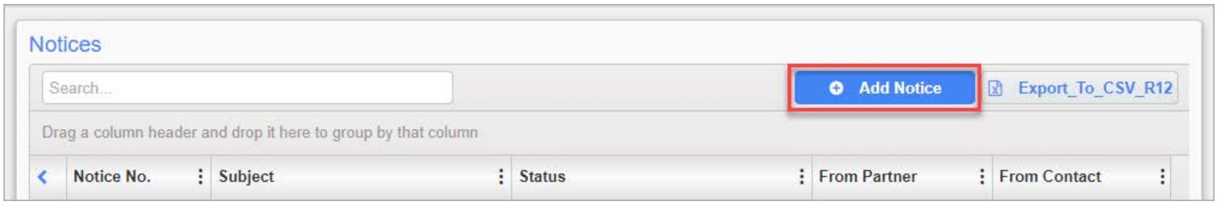
4.4.1 Purpose

Non-Compliance Notices can only be issued by NAVFAC. Non-Compliance Notices are in the Navigation Pane under the Site Management folder.

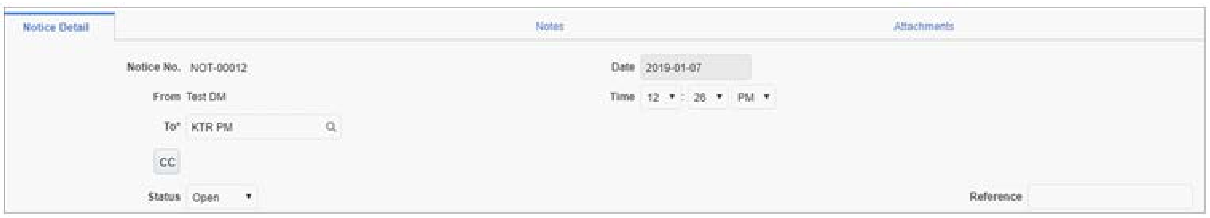


4.4.2 Adding a New Non-Compliance Notice

Select Add Notice from the top, right corner of the screen.



The first four fields will auto populate with the Notice Number, Date, your user name in the From field, and the Time the non-compliance notice is created (in Eastern Time). Enter the name of the contractor in the To field. Use the CC function to notify other users of the notice. Using the drop-down list, select the Status of the notice.

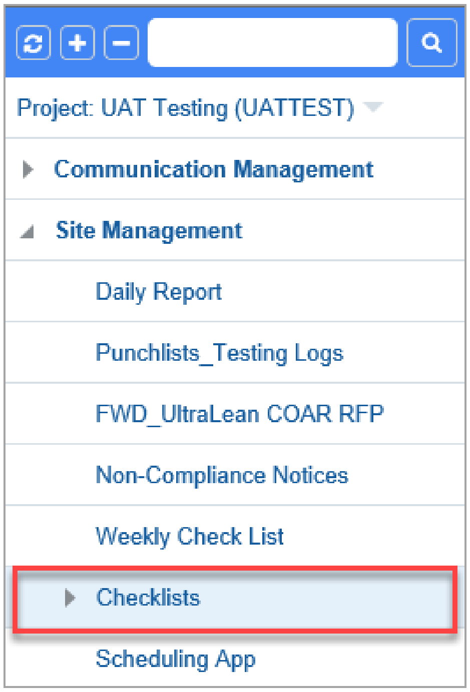


In the Subject line, enter a brief description of what this non-compliance notice pertains to. Use the Notes field to add details about the non-compliance. Follow-Up Notes can be added by NAVFAC or the KTR at a later date. A Follow-Up reminder can be set using the button and Date field at the bottom to add this to the KTR's action items.

You may use the Attachments tab to add drawings and photos. When done, click [**Submit**] on the top, right of the screen. The KTR will receive an indicator that a non-compliance notice is in their queue and the notice will show up in their My Actions list and on their Project Calendar in eCMS.

4.5 Checklists

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

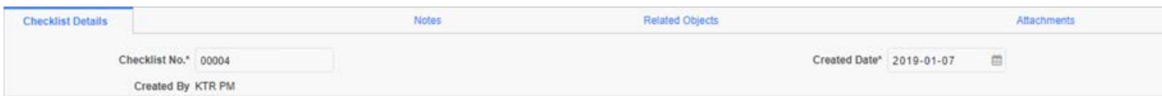


Then, click Checklists. The following are the Checklists that are currently available:

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.

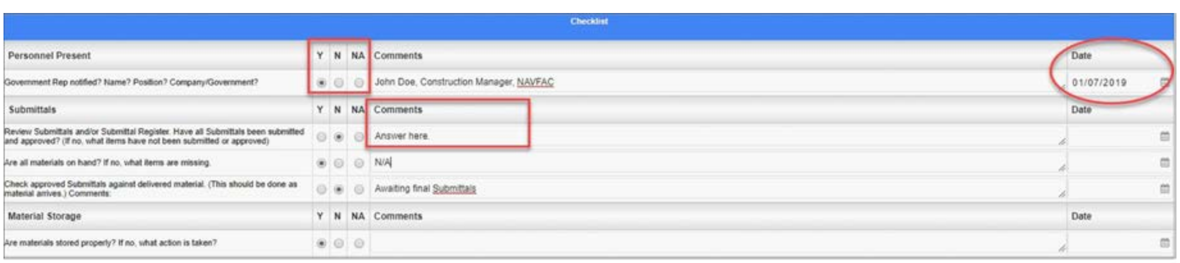
Fill in the required fields of the upper half of the Checklist. A short description of the top fields is provided below.



- **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 is 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.

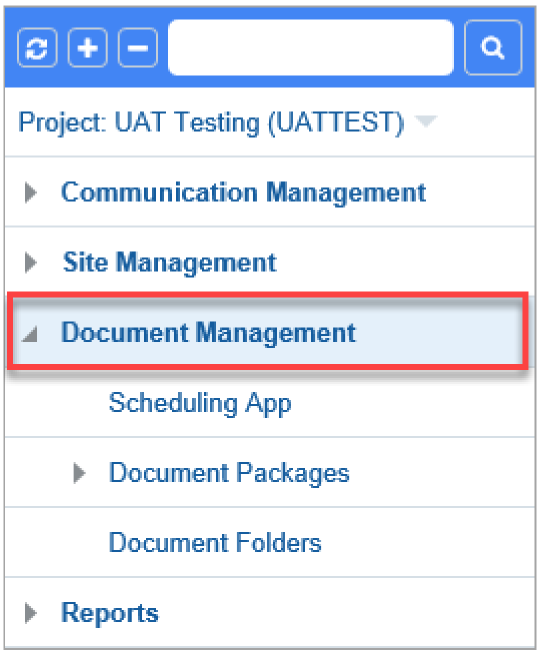


All checklists should be similar to existing forms that you are familiar using. Complete all pertinent information and then select [**Submit**] in the top, right corner of the screen.

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.

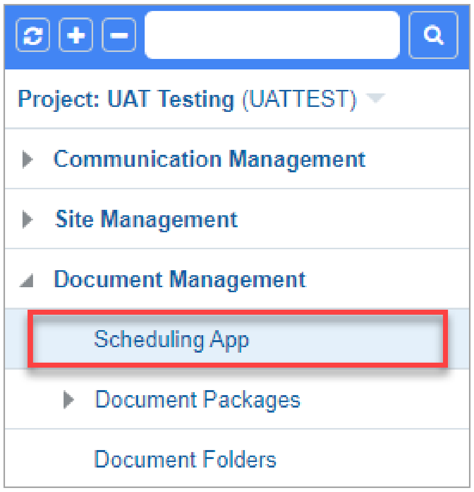
This section also includes Documents.

5.2 Restrictions on Document Upload

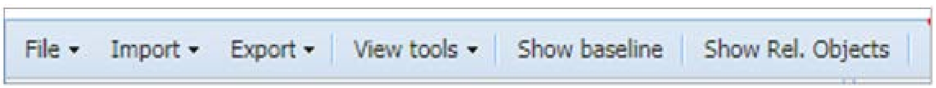
A user can upload as many files as needed However, the size limit of files per batch upload is 200 MBs.

5.3 Schedule App

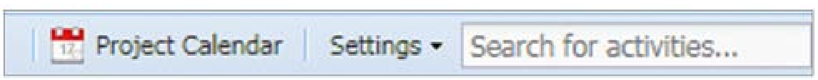
In the Navigation Pane on the left side of the screen, open the Document Management folder and select the Schedule App. If any baseline schedules have been uploaded, they will appear here.



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



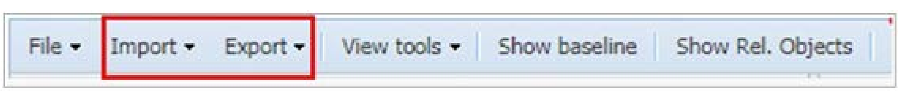
On the right side of the same bar, the Project Calendar displays the Schedule. With the drop-down, adjust the settings to only see critical path milestones, cascade changes, or view only tasks that are less than 30% complete. Users can also use the search bar to search for specific activities



5.3.1 Files

Using the drop-down 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 drop-down. Select the file type. A pop-up will appear for the Import.

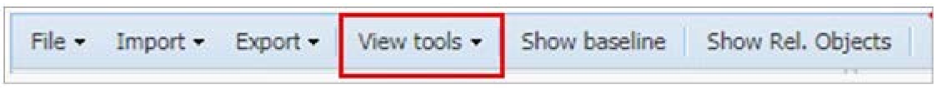
Click the [**Browse**] button to find the file on your computer and select [**Import**] when done.

To Export, select the drop-down next to the [**Export**] button on the tool bar. Select the file type to Export. This will automatically download the file to the desktop.

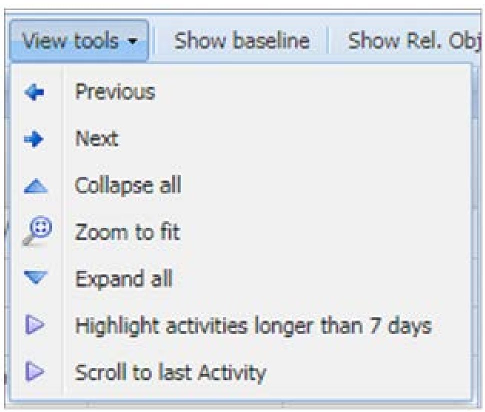
NOTE: If the user does not have Primavera or MS Project installed on their computer, these file types will not work.

5.3.3 Tools

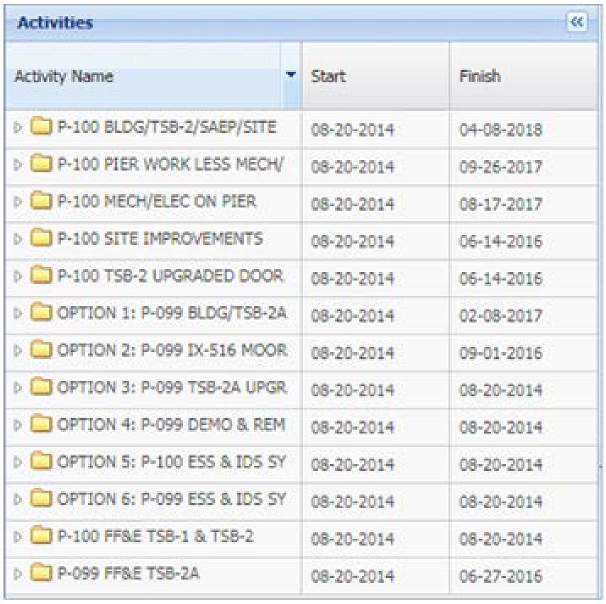
Select the drop-down next to View Tools on the tool bar.



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

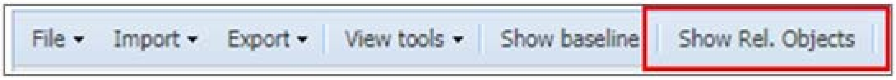
Use the [**Highlight Activities Longer than 7 Days**] button to see what tasks need extra attention.

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



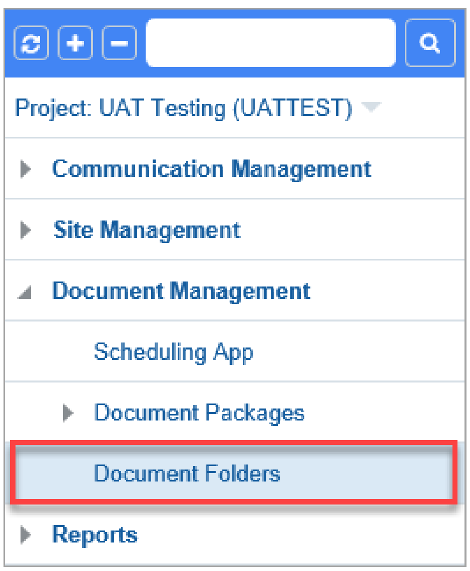
Select the [**Show Related Objects**] button to see if any Communications, Internal Routing tasks, RFIs, Submittals, or other documentation are attached to the schedule.

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.

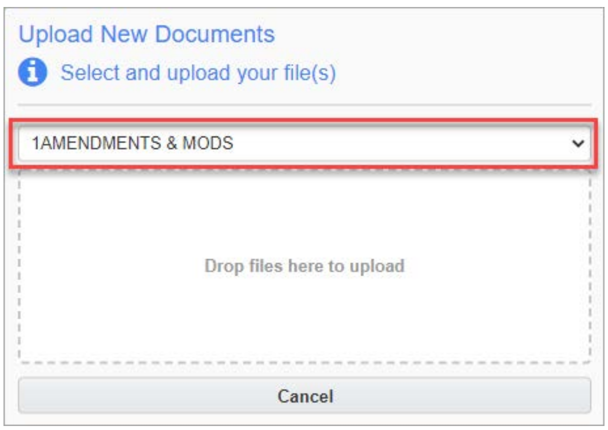
5.4 Document Folders

The Document Folders screen 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 Document Folder in the Navigation Pane under Document Management.

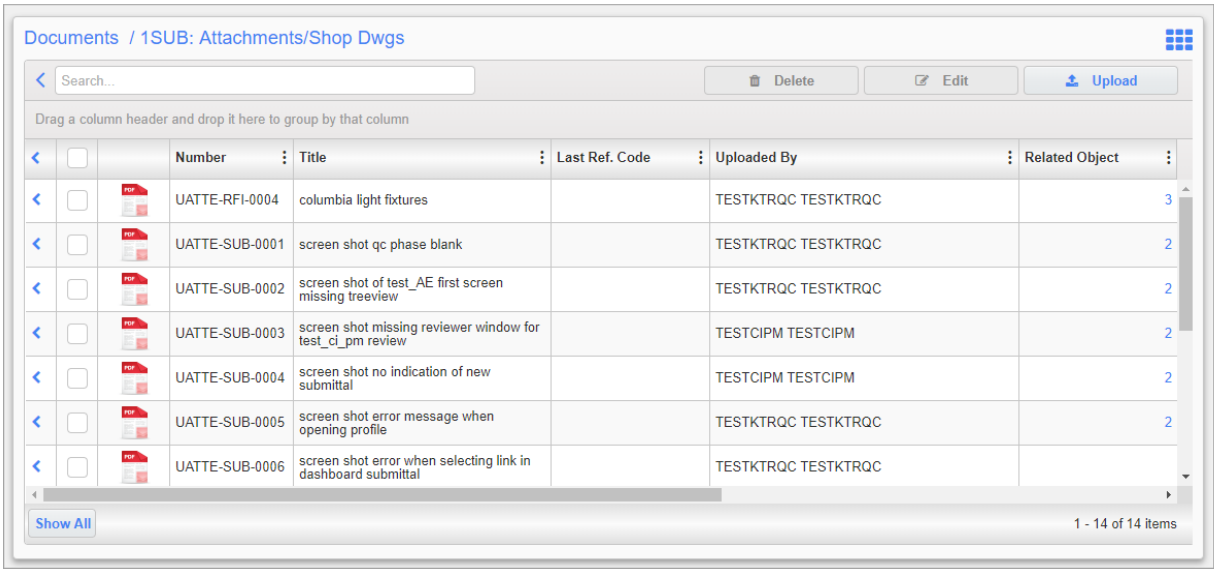


Your Documents folders may vary from the picture below. Click on a folder icon to open the log screen for documents of that type.

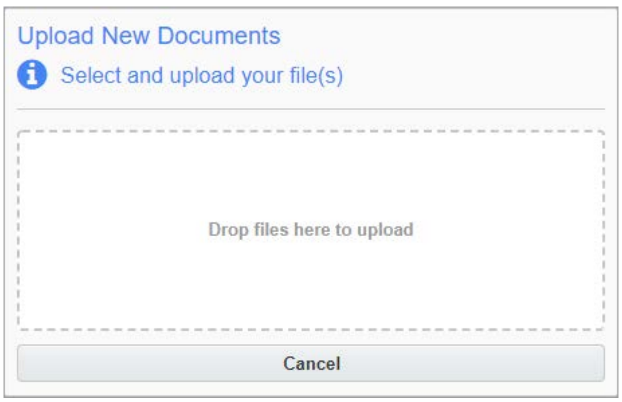
Click the [**Upload**] button on the Documents screen to bring up the pop-up screen shown below to add a new document. Select the document-type folder with the drop-down field and then drag the desired document in the area labelled “Drop files here to upload”.



Click one of the folder icons to bring up the contents of that folder, as shown below.



Here, documents can be opened by clicking on their document icon, edited, or deleted in batch by checking the corresponding checkboxes and pressing the [**Delete**] or [**Edit**] buttons, or uploaded to the selected folder by pressing the [**Upload**] button.



NOTE: The [**Upload**] button described here differs from the one mentioned above in that it only allows documents to be uploaded to the opened folder.

5.4.1 Uploading Attachments

5.4.1.1 Uploading Attachments to an RFI, Submittal, and Other Records

There are two options for uploading attachments:

- Using the Attachments Tab
- Using the Document Strip

One major difference between the two options is accessibility of the attachments once they are uploaded.

When uploading an attachment into the Document Strip, the attachment will automatically be placed in a default public folder: Open Submittals or Open RFIs. The attachment will immediately become accessible to the public. From there, the [**Edit**] button can be used to move it to another folder, if desired.

Uploading attachments using the Attachments tab allows the user the flexibility to designate which folder the attachment is uploading to. This way, the attachment can be automatically placed in a private folder, if desired.

Both options are described in more detail below.

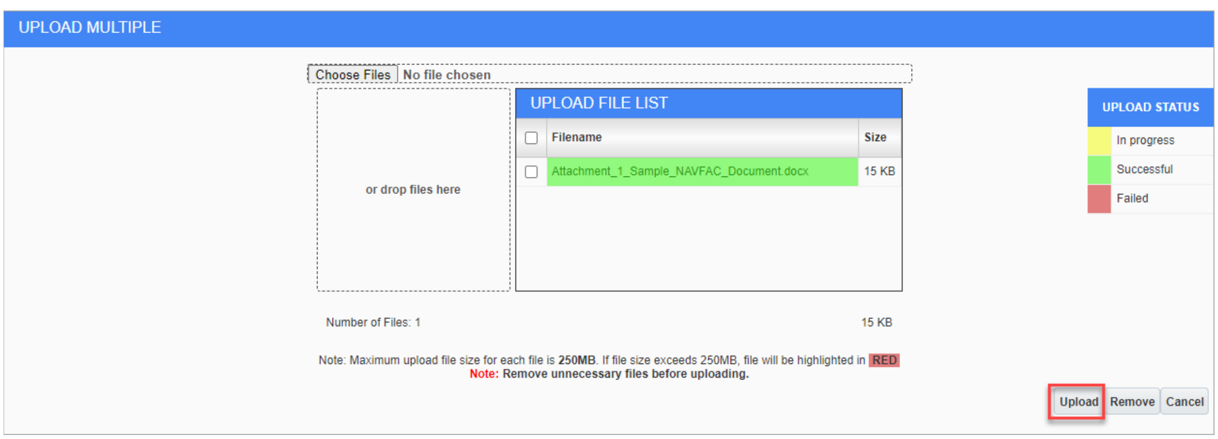
Uploading Attachments Using the Attachments Tab

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

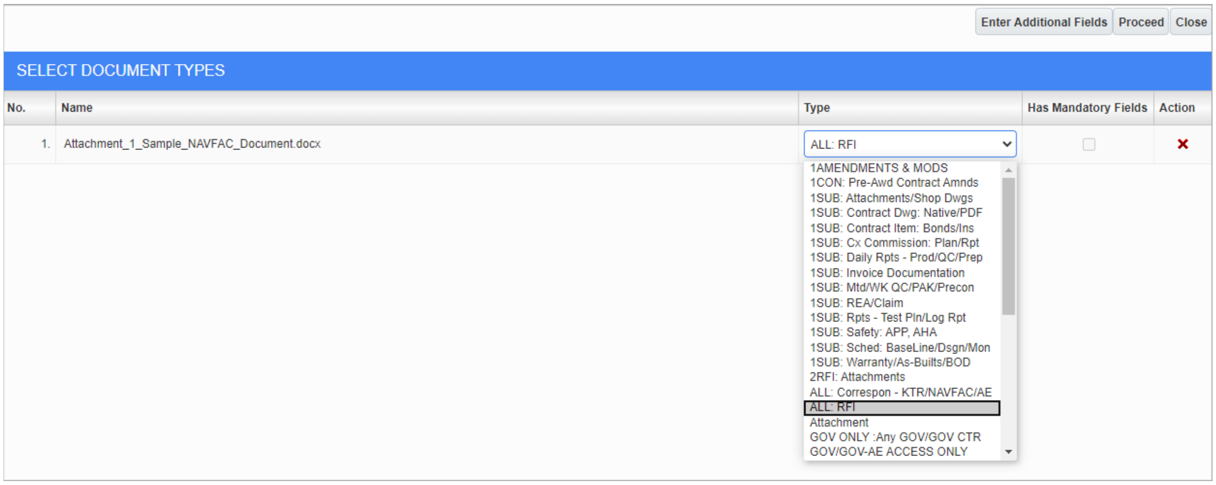
Select [**Upload Multiple**] on the upper-right corner.

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**].

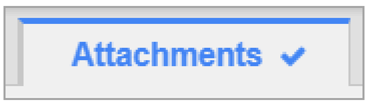
NOTE: The maximum file size per batch upload is 250 MB.



A new screen will appear asking for more information about the files. Use the drop-down 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.

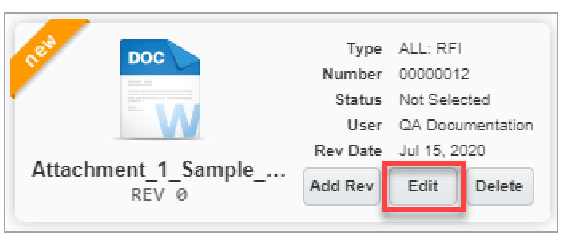


Uploading Attachments Using the Documents Strip

To upload an attachment to the Document Strip, the record must first be saved as a draft or submitted.

Documents can be added by dragging and dropping files into or clicking within the dashed area labelled “Drop files here to upload”.

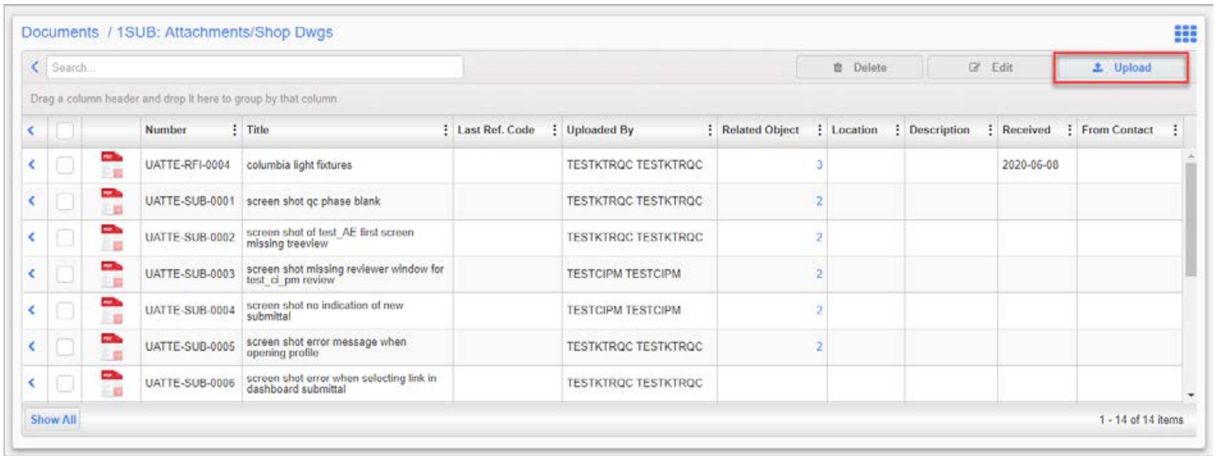
As mentioned earlier in this section, when an attachment is uploaded to the Document Strip, the attachment will automatically be placed in a default public folder: Open Submittals or Open RFIs. The attachment will immediately become accessible to the public. Once inside the Document Strip though, the [**Edit**] button can be used to move it to another folder, if desired.



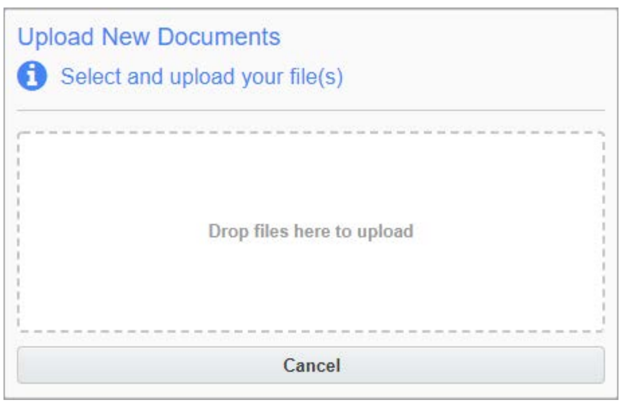
Documents that are uploaded to the Document Strip also then appear in the record’s Attachments tab.

5.4.1.2 Uploading Attachments to a Document Folder

Choose the folder to add an attachment. Then select [**Upload**] to add a single file or to add several attachments at once.



A pop-up window will open where a new document can be added. Users can either drag the desired document in the area labelled "Drop files here to upload" or click inside that same area to browse and select documents to upload.

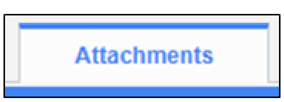


When a user uploads a file, the Title will automatically generate. Enter drawing numbers under the Designer Ref. box.

5.4.2 Downloading Attachments

5.4.2.1 Downloading Attachments from an RFI, Submittal, and Other Records

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

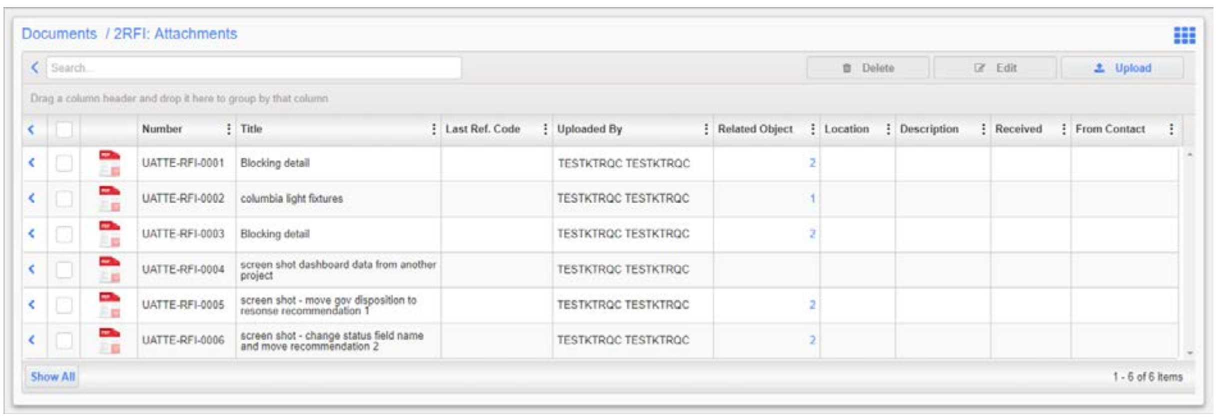


This tab displays all attachments currently attached to the record. For this example, there are three attachments.

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 in which the attachment is located. RFI – Attachments will be used for this example. Locate the attachment you want to download. Hove over the row that contains the document and click 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.