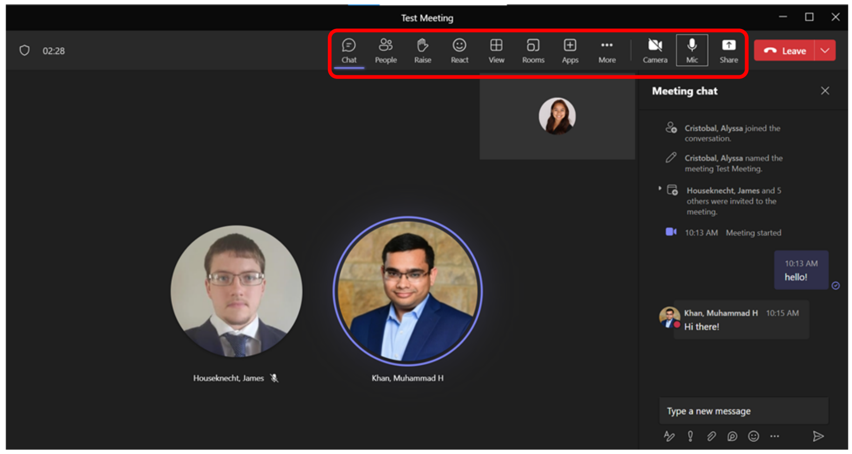
Teams Meeting Controls (All)

Meeting Controls:

1. **Chat:** Utilize to ask questions
2. **People:** See a list of everyone in the meeting
3. **Raise** your "hand" to let people know you want to contribute without interrupting
4. **View:** Customize how you see attendees and content
5. **Share:** Share your screen



Meeting controls are easy to use and extremely useful for participation. Meeting controls can be accessed by clicking each icon to hide/unhide:

- Chat: Selected in the screen shot above (see "Meeting chat" on the right side). You'll be able to access the chat after the meeting from your chat list.
  - Utilize the chat function to ask questions while the presenter is speaking. Feel free to raise your hand and unmute when the presenter asks if there are any questions at the end of each training module.
- People: See a list of everyone in *and* invited to the meeting.
- Raise your "hand" to let people know you want to contribute without interrupting: Meeting presenters will be notified, and everyone will see that your hand is raised when viewing People.
- React: Choose an emoji like 👍 and it will appear for a few seconds on screen for everyone in the meeting.
- View: Customize how you see attendees and content.
- Share your screen:
  - When you are sharing, the content being shared will be outlined in red.
  - If the Share icon is grey, you'll have to ask the meeting organizer to change the setting for Who can present?

Other notable icons to keep in mind:

- Click the Mic to mute/unmute.
  - The person speaking will be circled in purple.
- Click the Camera to tun your camera on/off.

TRAINEE NOTES

Electronic Construction Management System (eCMS)

Module 1: Basics

This module includes the following topics:

- Introduction
- eCMS Usage Requirements
- Naming Conventions
- eCMS Roles
- Setting up an eCMS Project (COR)
- Requesting eCMS User Accounts (COR)
- Logging into eCMS
- eCMS User Interface
- Navigating Projects
- My Actions Screen
- eCMS eMail Preferences
- Browsing to a Record
- Filtering a Record Log
- Sorting a Record Log
- Entering Data
- Adding Users to a Project (COR)
- Deactivating Users from a Project (COR)
- Adding an Attachment via Attachments Tab
- Adding an Attachment via Documents Section
- Opening Attachments
- Adding a Note
- Relating Objects
- Send IO Email
- History
- Exporting a Record Log
- Help Resources
- Summary

Training Structure & Registration (All)

Module 1: Basics	Module 8: Meetings
Module 2: Dashboards	Module 9: Non-Compliance Notices
Module 3: Communications	Module 10: PSPDF Viewer
Module 4: Issues	Module 11: Checklists
Module 5 & 6: RFIs and Submittals	Module 12: Distribution Lists
	Module 13: Reviewer Templates
Module 7: Daily Reports	Module 14: Punch Lists

Access the links below to find the training registration survey and other training material!
NAVFAC eCMS SharePoint Online Site
eCMS Public-Facing Site

- At this time the Deloitte team, in conjunction with the eCMS User Group, is offering 13 training sessions split up across 14 different Modules (see above).
- Training sessions are conducted multiple times a day, on a weekly basis. This schedule alternates timeslots and audiences to accommodate busy schedules and time zones that may not be EST. You can find the training schedule and training registration survey, along with training material, posted in the following locations:
  - the eCMS SharePoint Online site (NAVFAC Personnel Only): (https://flankspeed.sharepoint-mil.us.mcas-gov.us/sites/NAVFACHeadquartersConstructionDC5/SitePages/Electronic-Construction-Management-System-(eCMS).aspx)
  - eCMS Public Facing Site (Contractor & NAVFAC Accessible): (https://www.navfac.navy.mil/Directorates/Planning-Design-and-Construction/About-Us/Planning-Design-and-Construction-Documents/Electronic-Construction-Management-System-eCMS/)
- If you would like to attend a certain training session, you can do so by filling out the survey on the sites (see above).

- **NOTE: ***Registration must be done at least 1 day in advance.**
- Meeting invites are processed at the end of each day, so if you would like to obtain a meeting invite for a "same day" registration, please reach out to your eCMS POC.

TRAINEE NOTES

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Introduction (All)

- Web-based, enterprise project collaboration tool
- Improves NAVFAC/Contractor interaction
- Improves post-award management of schedules, RFIs, designs, submittals, etc.
- Intended for GOV and KTR users associated with a project (provided at no cost to the KTR or other users)
- Reduces “hard copy” document volume
- Enables document tracking
- Provides data exchange with other NAVFAC systems (e.g., ieFACMAN)
- Source of KPI Metrics
- Usable with mobile devices (e.g., tablet computers)
- Cards-on-the-table
  - Often many different ways to do things in eCMS
  - eCMS is constantly evolving
  - The ONLY way to “get good” at eCMS is to USE eCMS

- eCMS improves document FLOW while at the same time improving and standardizing project RECORDKEEPING. An additional benefit in today’s data-driven world is that it provides source data for many of our Key Performance Indicators.
- There are often several ways to accomplish the same goal when you’re using eCMS. This training, and the SOPs and other reference materials, are intended to guide you through the method that is most efficient, while noting other methods and their potential use cases.
- The eCMS application is constantly changing and evolving in response to requests from the NAVFAC eCMS User Group and suggestions from users like yourself.
  - If you don’t like something, if you think there’s a better way to do it, or if you get frustrated because something doesn’t work the way you think it should, address the issue with your local eCMS Power User first, then through your PDC staff, or through a STS ticket.
- Becoming proficient in using eCMS will require effort on YOUR part – the ONLY way to truly learn how to use eCMS well is to USE eCMS as much as you can. Try different things… discuss your experiences with your peers and your local Power User… actively participate in eCMS training events and eCMS usage conference calls to learn and share experiences…
- **NOTE: Refer to contract documents; specifically contract specifications that have requirements for preparation and information to be included with each eCMS object, regardless of if there is a designated eCMS field or data input.**

TRAINEE NOTES

eCMS Usage Requirements (All)

- NAVFACINST 5200.5 (18 Oct 2022) *requires*:
  - Full eCMS usage for all MILCON projects awarded after 30 June 2020
  - Full eCMS usage for all construction and repair projects awarded after 1 October 2020 with a contract value > $1MM
  - eCMS usage as an electronic filing cabinet for all construction and repair projects awarded after 1 October 2020 with a contract value > $250K (SAT) and less than $1MM
- NAVFACINST5200.5 (18 Oct 2022) *recommends*:
  - eCMS usage for construction and repair projects with a contract value < $250K (SAT) but it is not *required*

- NAVFACINST 5200.5 (18 Oct 2022) – superseding KiloGram 21-01 (released 2 Oct 2020) requires:
  - Full eCMS usage for all MILCON projects awarded after 30 June 2020.
  - Full eCMS usage for all construction and repair projects with a contract value greater than $1M and awarded after 1 October 2020.
  - eCMS usage (at a minimum) as an electronic share drive ("electronic filing cabinet") for all projects with a contract value greater than the Simplified Acquisition Threshold (currently $250K). Use of other features is highly recommended.
- NAVFACINST 5200.5 further encourages (but does not require) the use of eCMS for projects with a contract value less than $250K.

TRAINEE NOTES

Naming Conventions (All)

- Internal Users = NAVFAC Employees
- External Users = Customers, Contractors, Third Parties
- REV = Reviewer Role
- KTR = Contractor Role
- COR = Contracting Officer's Representative Role
- eCMS SME = Subject Matter Expert referring to those with a Super User role
- Objects = Records within eCMS such as RFIs, Submittals, Communications, Issues, Meetings, and Contacts

- Some naming conventions used throughout this training and eCMS are commonly used but not totally obvious in what they mean or are referring to.

TRAINEE NOTES

eCMS Roles (All)

- eCMS users are assigned to SECURITY roles and PROJECT roles in eCMS
- Each SECURITY role includes permissions – things you can see or do
  - A Contractor can ADD a new Submittal record
  - A COR can VIEW and UPDATE an existing Submittal record but cannot ADD a new one
- Roles are project-specific – you could be a COR on one project, but a Reviewer on another

- Within eCMS, some users can SEE objects and can do things with them once they've been created (such as RFI) while others can both SEE them and ADD new ones. For example, a Contractor can create an RFI record in eCMS but a COR cannot. This is an example of permissions that are dependent on a ROLE. These roles define what each user can SEE and what each user can DO.
- It is important to understand that if you are supporting multiple projects, the things you can SEE and DO could change based on the project you are working on and the role to which you are assigned on those projects.
- The initial Project Role your account was created with will be the default for future projects. The CM or DM can and should update the Project Roles for contacts in the Project Contact Directory when adding existing eCMS users to a project.
- Security Role permissions supersede Project Role permissions in terms of access and capabilities. In order to make use of the capabilities of a certain project role, you must have a security role of equivalent or greater permissions.

TRAINEE NOTES

Setting up an eCMS Project (COR)

1. **Determine if the project exists within eCMS already**
2. Navigate to the eCMS SharePoint Online Page (link below)
3. Download the eCMS Project Setup Request Form
4. Completely fill out all required fields on the form
5. Email the completed form to NITC Ops Watch (eMail address is in the form and below)

New eCMS Project Setup (COR / PMEB / SGE Only)
Version 5.00

To:	NITCOpsWatch@us.navy.mil		
From (COR / PMEB / SGE Name):		eMail:	

DESCRIPTION		INFORMATION
Project Administrative Contracting Office		
REQUIRED: Select Applicable Echelon III Command		<-- **STEP 1:** Select applicable Echelon 3 Command and Continue with **STEP 2.**
REQUIRED: Select Applicable Echelon IV Command		<-- **STEP 2:** Select applicable Echelon 4 Command and Contine with **STEP 3.** If STEP 1 is "CORE", leave blank.
REQUIRED: Select Applicable Field Office		<-- **STEP 3:** Select applicable Field Office.
Project Information		
REQUIRED: Project is in eContracts? Enter 7-Digit ACQR Number		<-- MOST, but not ALL eCMS Projects are in eContracts and will have a ACQR. The eContracts ACQR will become the Project Co
REQUIRED: Project is **NOT** in eContracts? Who is contracting the Project?		<-- SOME Projects are NOT in eContracts - mainly those contracted through a different Agency / Organizatio
Contract Number (Format: NXXXXX-XX-X-XXXX)		
Is this a Multi-Project Contract (Select YES or NO)?		<-- On RARE occasions, a single Contract with a single ACQR is used for multiple Projects - Contact local eCMS SME for guidanc
Should Multi-Project Contract be Set up as One eCMS Project or Multiple?		<-- Make a selection for this field ONLY if you selected YES previously.

Project Data for Single or Multi-project Contracts (Use first line if single project contract)

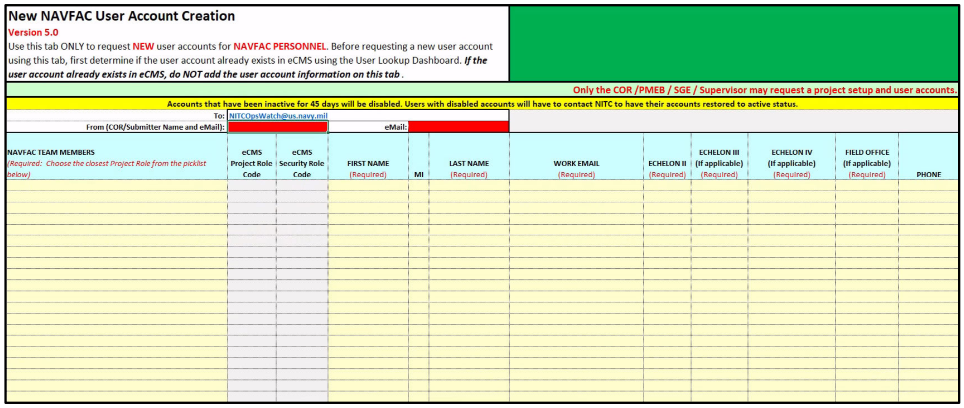
Project Title (REQUIRED)	Task Order No. (Format: YYYYY-YY-Y-YYYY)	Project P-Number (If MILCON)	Prime Contractor (REQUIRED: Enter Contractor Company Name)

- For now, there is only ONE way to get contracts loaded into eCMS:
  - Download Project Setup Request Form: https://flankspeed.sharepoint-mil.us/sites/NAVFACHeadquartersConstructionDC5/SitePages/Electronic-Construction-Management-System-(eCMS).aspx
  - Complete a Project Setup Request Form and send it to the NITC Operations Watch eMail address (NITCOpsWatch@us.navy.mil). NITC will create a ticket in the Support Tracking System (STS) where the project creation team will process the ticket and create the project within eCMS using the information on the form.
  - The wait-time for this process is typically less than 2 hours during the workweek, however, if you submit a ticket after hours on Friday or during the weekend, the team will process that ticket on Monday of the next week.
- When filling out the Task Order Number, the first part of the string is the UIC for the contracting organization. Second element is the FY for the contract or TO, third string is the contract type (almost always C or D for our purposes), and the 4th element is the contract or TO number.
- NAVFAC is currently working on a process in which you can flag projects in eContracts to indicate that they should go into eCMS. A nightly eContracts query will pull the necessary eContracts data so it can be used to automatically set up the project in eCMS.
- NOT ALL projects requiring NAVFAC Project Oversight are in eContracts. For example, certain contracts are awarded by USACE but are overseen by NAVFAC. These projects cannot be created automatically, so we will always need to retain the Project Setup Request form.

TRAINEE NOTES

Requesting eCMS User Accounts (COR)

1. **Determine if the user already has an eCMS account**
2. Navigate to the eCMS SharePoint Online Page (link below)
3. Download the eCMS New User Account Request Form



New NAVFAC User Account Creation

Version 5.0

Use this tab ONLY to request NEW user accounts for NAVFAC PERSONNEL. Before requesting a new user account using this tab, first determine if the user account already exists in eCMS using the User Lookup Dashboard. ***If the user account already exists in eCMS, do NOT add the user account information on this tab .***

Only the COR /PMEB / SGE / Supervisor may request a project setup and user accounts.

Accounts that have been inactive for 45 days will be disabled. Users with disabled accounts will have to contact NITC to have their accounts restored to active status.

To: NITCOpsWatch@us.navy.mil

From (COR/Submitter Name and eMail): eMail:

NAVFAC TEAM MEMBERS (Required: Choose the closest Project Role from the picklist below)	eCMS Project Role Code	eCMS Security Role Code	FIRST NAME (Required)	MI	LAST NAME (Required)	WORK EMAIL (Required)	ECHELON II (Required)	ECHELON III (If applicable) (Required)	ECHELON IV (If applicable) (Required)	FIELD OFFICE (If applicable) (Required)	PHONE

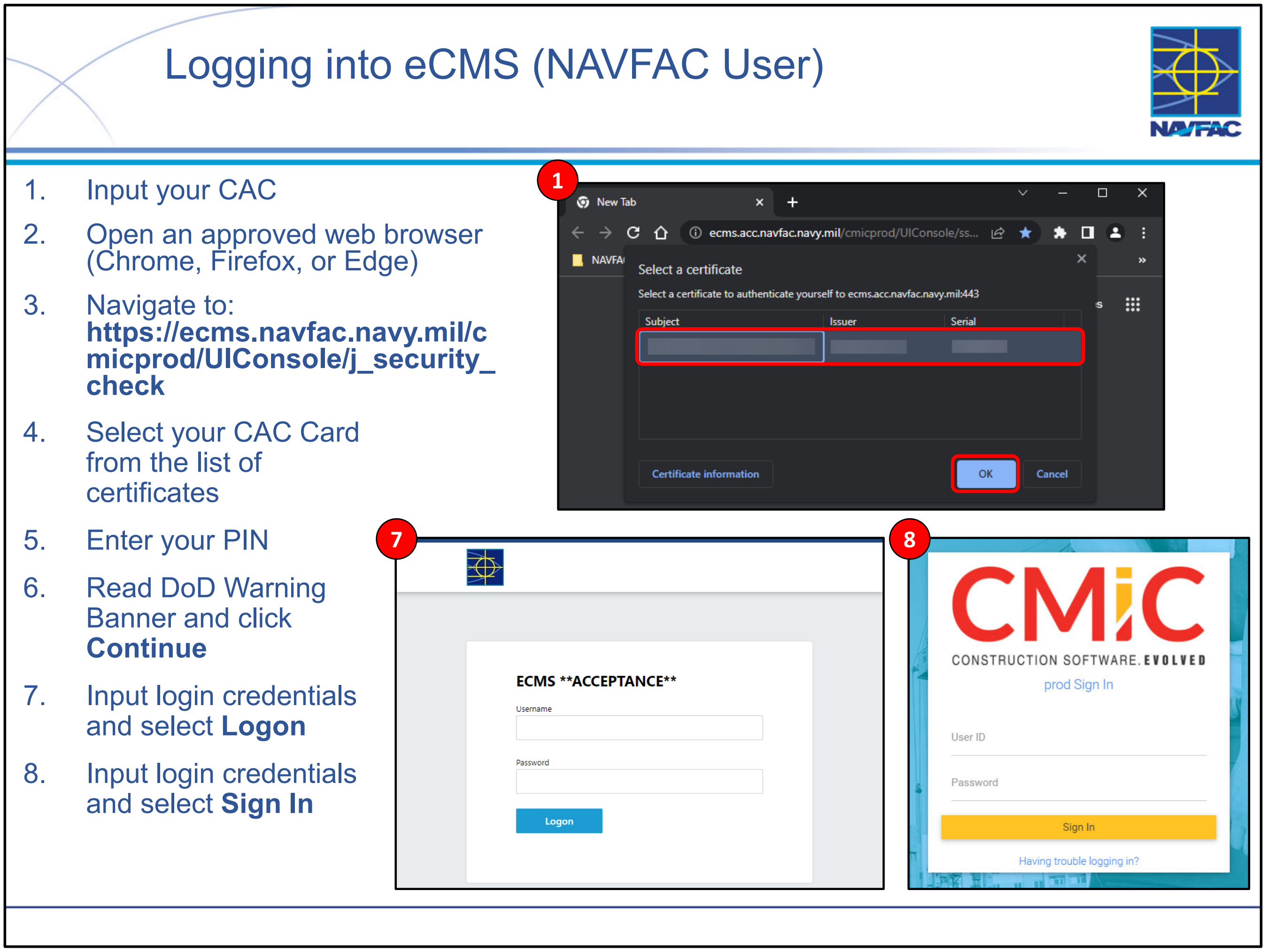
4. Completely fill out all required fields on the form
5. Email the completed form to NITC Ops Watch (eMail address is in the form and below)

- You **MUST** determine if the user already has an eCMS account BEFORE adding the user's information to the Access Request Form.
  - You can utilize the User Lookup Dashboard for determining a user's existence in eCMS (*see Module 2 – Dashboards*)
- Within the New User Account Request Form there are two tabs, one for NAVFAC personnel and one for other personnel.
- For now, there is only ONE way to get users loaded into eCMS:
  - Download Access Request Form: https://flankspeed.sharepoint-mil.us/sites/NAVFACHeadquartersConstructionDC5/SitePages/Electronic-Construction-Management-System-(eCMS).aspx
  - Complete the New User Account Request Form and send it to the NITC Operations Watch eMail address (NITCOpsWatch@us.navy.mil). NITC will create a ticket in the Support Tracking System (STS) where the project creation team will process the ticket and create the user account(s) within eCMS using the information on the form.
- If you are requesting that a user's account be updated, then include this information in the ticket and make sure the STS ticket is under the correct category: "User Account Update Request".

LESSON LEARNED: NITC is REJECTING submissions that use the incorrect version of the form! Always download the most current from the NAVFAC Portal eCMS Page.

LESSON LEARNED: NITC is REJECTING submissions that contain users that already exist within the system, always check to be sure the user does not exist in eCMS!

TRAINEE NOTES

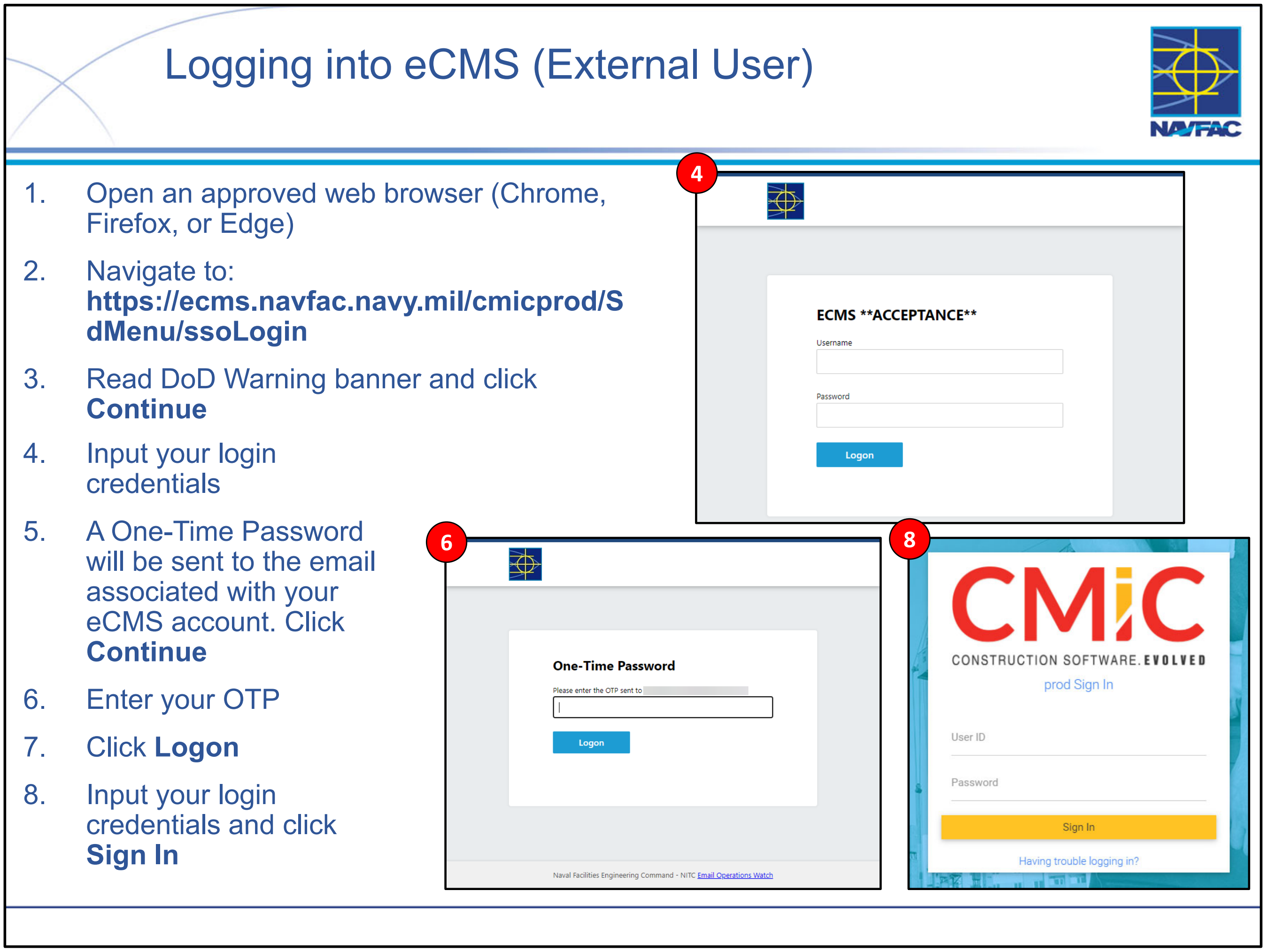


- **NOTE ON SYSTEM STATUS:** While eCMS is up and operating normally, NAVFAC users are encountering an issue accessing the site using the NAVFAC Web Browser URL. Root cause analysis is ongoing. Until further notice, NAVFAC personnel should use the Contractor URL (https://ecms.navfac.navy.mil/cmicprod/SdMenu/ssoLogin) to access eCMS instead of the normal, NAVFAC URL. You can use your normal eCMS user credentials (Username and Password), and user experience in logging in to eCMS will be the same as it normally is – you're just using a different URL.
- Logging in to eCMS is a straightforward process:

1. Insert your CAC into your computer.
2. Open an approved web browser. This could be Google Chrome, Mozilla Firefox, or Microsoft Edge.
3. Navigate to eCMS (https://ecms.navfac.navy.mil/cmicprod/UIConsole/j_security_check).
   1. **NOTE:** The links to sign into eCMS are different for NAVFAC Users vs External Users. The correct links can be found linked on this slide, on the eCMS Public-Facing Site (Contractor & NAVFAC Accessible), or on the eCMS SharePoint Online site (NAVFAC Personnel Only).
4. Your browser will prompt you to choose a certificate form a list of options – choose your CAC card.
5. A dialogue box will appear prompting you to enter your pin – enter your pin.
6. Read the DoD Warning Banner and click Continue.
7. Input your login credentials (for the first time).
   1. **NOTE**: The password is case sensitive. If you need to reset your password, please submit a ticket via the Support Tracking System (STS) or send an email to the NITC Operations Watch eMail address (NITCOpsWatch@us.navy.mil).
8. Input your login credentials (for the second time).

- You have successfully logged into eCMS!

TRAINEE NOTES

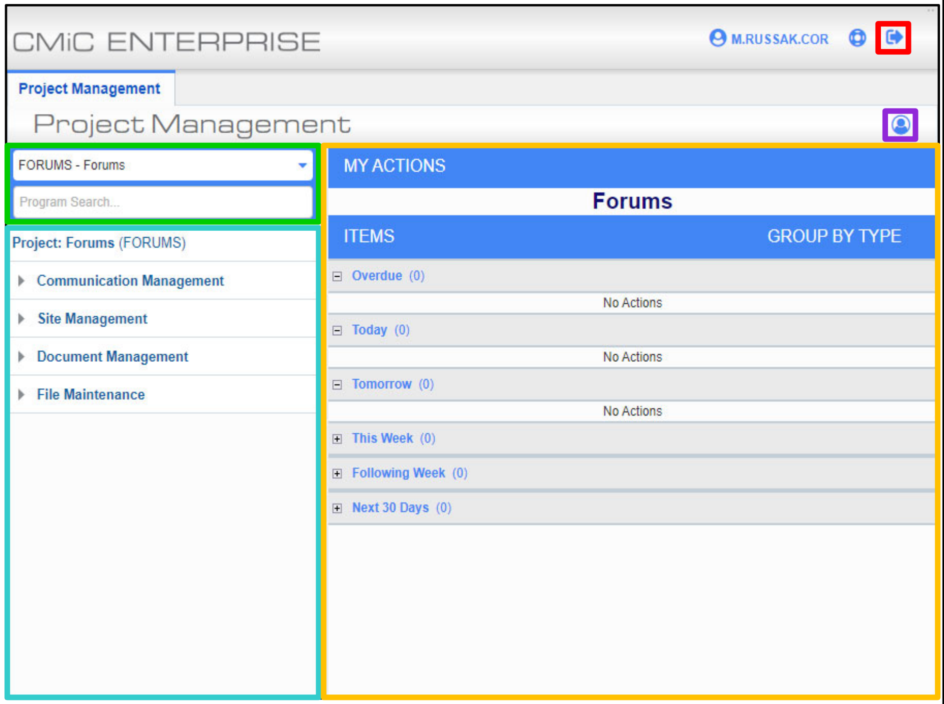


- Logging in to eCMS is a straightforward process:
  1. Open an approved web browser. This could be Google Chrome, Mozilla Firefox, or Microsoft Edge.
  2. Navigate to eCMS (https://ecms.navfac.navy.mil/cmicprod/SdMenu/ssoLogin).
     1. **NOTE:** The links to sign into eCMS are different for NAVFAC Users vs External Users. The correct links can be found linked on this slide, on the eCMS Public-Facing Site (Contractor & NAVFAC Accessible), or on the eCMS SharePoint Online site (NAVFAC Personnel Only).
  3. Read the DoD Warning Banner and click Continue.
  4. Input your login credentials (for the first time).
     1. **NOTE**: The password is case sensitive. If you need to reset your password, please submit a ticket via the Support Tracking System (STS) or send an email to the NITC Operations Watch eMail address (NITCOpsWatch@us.navy.mil).
  5. Acknowledge One-Time Password (OTP) screen and click Continue.
  6. A One-Time Password will be sent to the email associated with your eCMS account. Enter the OTP and click Logon.
  7. Input your login credentials (for the second time).
- You have successfully logged into eCMS!

TRAINEE NOTES

eCMS User Interface (All)

- Project Navigation and Project Search Bar
- Navigation Pane
- Content Pane
- User Profile
- Exit

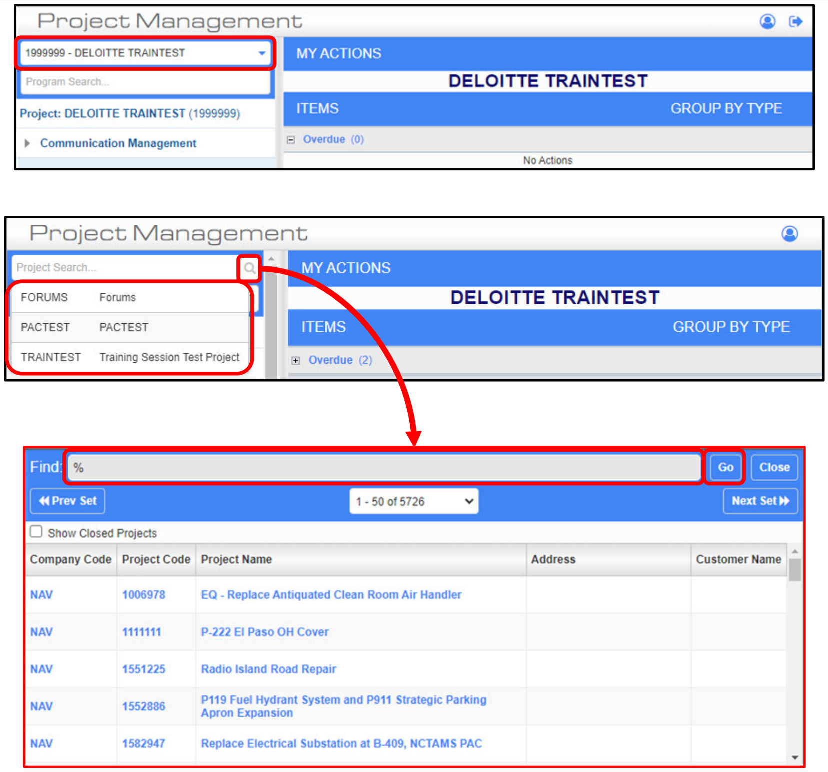


- Shown in the slide is the default landing page you will see once you log into eCMS. Depending on your role, this page might look slightly different, but the fundamental building blocks for navigating eCMS are the same for every role:
  - [GREEN] **Project Navigation Dropdown** – In its default state, this dropdown will display the project you are currently in (slide is displaying the FORUMS project, a default project within the system). Upon selecting the dropdown, you have the ability to "step into" one of your other projects, or search for a specific project (more on this later).
  - [GREEN] **Program Search Bar** – This search bar is an easy way to step into a specific eCMS Object without having to use the navigation pane to find it (ie. Searching RFI will allow you to select the RFI module from the dropdown and take you to the RFI log for the project).
  - [BLUE] **Navigation Pane** – This pane is where you will navigate to various modules that a project is comprised of (RFI, Submittals, Communications, Dashboards, etc.).
  - [YELLOW] **Content Pane** – This pane is where you will perform most of your work to add, edit, review, or otherwise manipulate the Object you are working with.
  - [PURPLE] **User Profile** – This is where you can quickly access your profile and edit selected profile information. This is where you can update your email notification preferences (more on that later).
  - [RED] **Exit** – This is where you can log out / exist the eCMS application.
- As shown in the slide, the default eCMS Landing Page is the MY ACTIONS page (more on that later).

TRAINEE NOTES

Navigating Projects (All)

1. Login to eCMS
2. Click **Project Search** dropdown
3. Select project from dropdown **OR** select the magnifying glass to search for a project

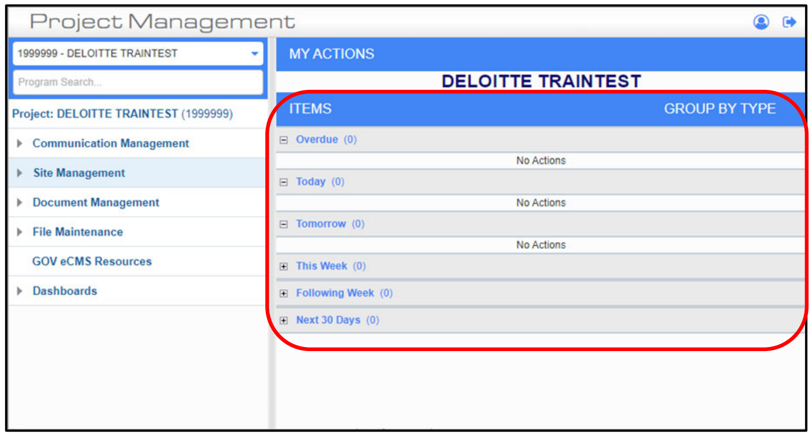


- One of the most important "rules" when you are working in eCMS is to **always ensure you're working in the correct project.** You always must check this because there is a potential that you are involved in more than one project. The Project Search dropdown in the upper left-hand side of your screen will indicate which project you are currently in.
- eCMS "remembers" the last 10 projects you have accessed – this makes the "navigate to the correct project" issue an easy one to resolve.
- Finding a project that is NOT on your "remembered projects" list is accomplished with a straightforward search, but getting to the search screen is not completely intuitive. Whenever there is a User Defined Field with a magnifying glass icon, use the magnifying glass icon to select a value.
- **NOTE**: Depending on the resolution of the user's screen, the magnifying glass icon may be hidden behind the dropdown list of projects. The way to fix this is to zoom out in the browser window. This will make everything on your screen smaller, and you will now see the magnifying glass icon available when selecting the search bar.
- When you search, your search is applied globally across all fields. A quick way to search is by Project Code – this is almost always the ACQR for the project.
- KTRs are not able to step into different projects if they're not added to any other projects.
- CORs have the ability to step in and out of any project (anyone else with the Master role as well: Supervisor, CM, DM, REV).

TRAINEE NOTES

My Actions Screen (All)

1. Log into eCMS
2. Navigate to **MY ACTIONS**
3. The following Actions are displayed:
   1. Overdue
   2. Due Today (Day 1)
   3. Due Tomorrow (Day 2)
   4. Due this week (Days 3-7)
   5. Due next week (Days 8-14)
   6. Due in the next 30 days (Days 15-30)

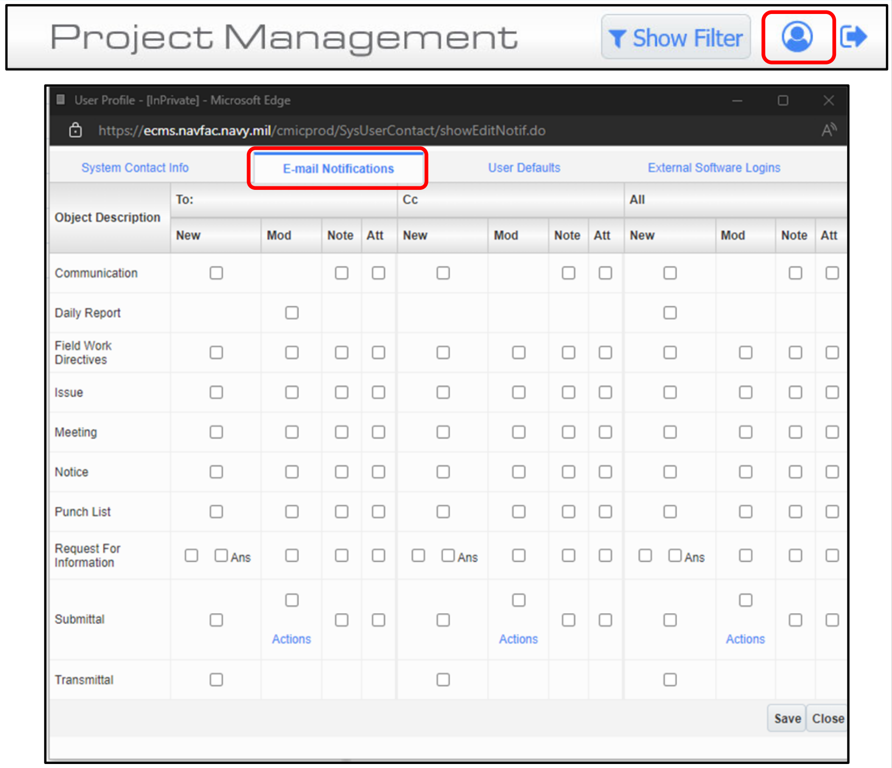


- The default Landing Page is the MY ACTIONS page. It succinctly presents the actions that are assigned to you and categorizes them by due date.
- NOTE: No duplicates! If something is in one category, it will NOT be in another.
- For example, if a task is due TOMORROW, then it will not also be displayed in the THIS WEEK category. It WILL be displayed in the category that appears soonest (tomorrow is before the end of this week for example).

TRAINEE NOTES

eCMS eMail Preferences (All)

1. Click user icon to access user profile
2. Click **E-mail Notifications**
3. Select the necessary notifications

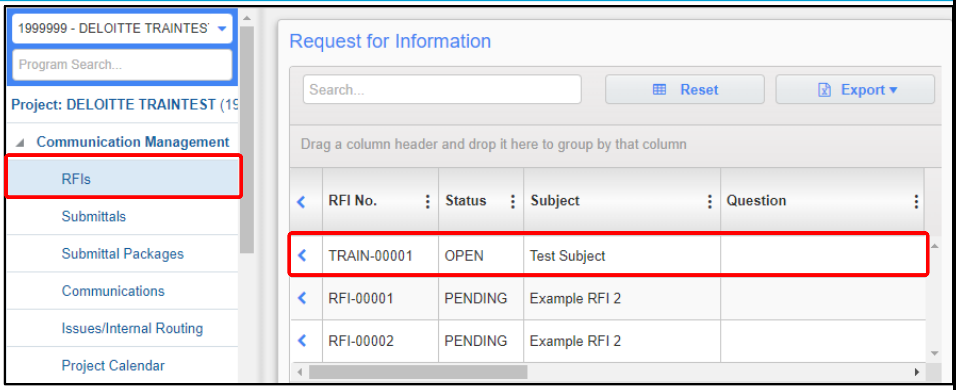


- Global eMail preferences apply to all projects you are assigned to while project-specific preferences are (just as the name implies) unique to each project.
- Notifications are managed based on a number of "triggers" for each eCMS OBJECT. A trigger is an event that occurs (e.g., a new object has been created, or an existing object has had an attachment added). If the trigger occurs, and if you have checked the associated checkbox, then an eMail will be automatically generated and sent to you.
- Our experience is that the Project-specific preferences will override the Global preferences.

TRAINEE NOTES

Browsing to a Record (All)

1. Ensure you have stepped into the correct project
2. Navigate to the eCMS object you want to browse (RFI, Submittals, etc.)
3. Browse to and click the desired record

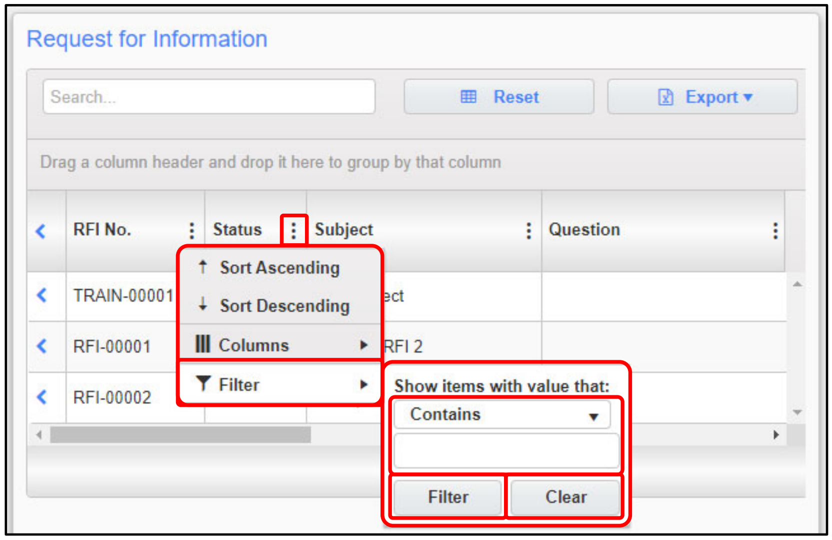


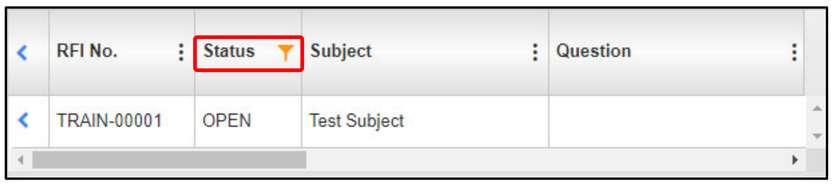
- The single most important watch-out when locating a record in eCMS is to ensure you are in the right project. This is particularly important if you are assigned to multiple projects.
- When you click the object link in the Navigation Pane, the project's Record Log is displayed in the Content Pane. In the coming slides we will do a deep dive of a Record Log, there are quite a few powerful tools for navigating a Record Log to visualize the information you are searching for.
  - New records will be displayed at the top with an orange NEW banner.
  - Recently-modified records appear next with a blue MOD banner.
  - Recently opened records appear as links in the Navigation Pane.
- Simply scroll to the record you want and click on it to open it.

TRAINEE NOTES

Filtering a Record Log (All)

1. Navigate to the eCMS Object you wish to access (RFIs, Submittals, etc.)
2. Click ellipses in any column to filter by that column
3. Select **Filter** to open filter dialog box
4. Enter filter criteria and click **Filter**
5. To clear the filter, use the same process (1-4) and click **Clear**



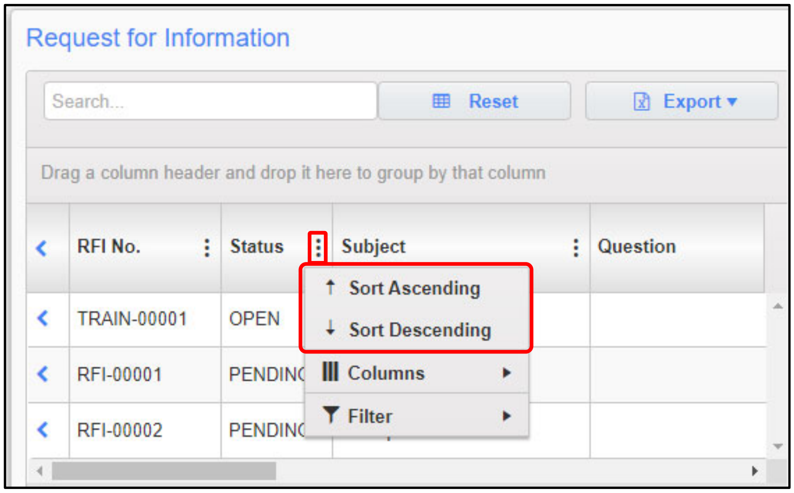


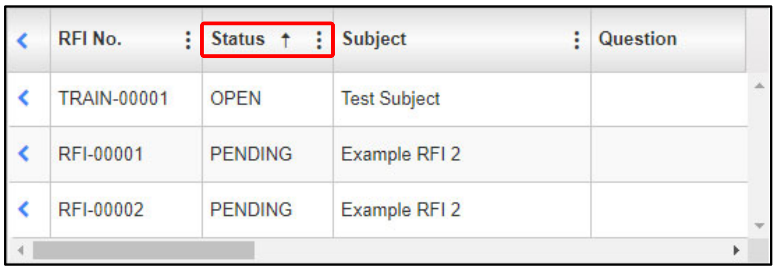
- A very large project may have hundreds of records and it could be very time consuming to scroll to the one you want. Filtering is a method of searching for a specific record:
  - Navigate to the Log you wish to access (RFIs, Submittals, etc.)
  - Click the ellipses in any column to filter by that column
  - Select **Filter** to open the filter dialog box
  - Enter filter criteria and click **Filter**
  - To clear the filter, use the same process as above and click **Clear**
  - **NOTE:** If you access an eCMS object such as RFIs or Submittals and see fewer records than you are expecting, or no records at all, double-check all the column headers for a lingering column filter (orange filter icon shown in the slide) and clear that filter from the log. This may fix your issue.
- You can filter on multiple columns at the same time to really "drill down" to your desired record set quickly.
- **LESSON LEARNED**: ALWAYS clear your filters when you are done with them. Filters are PERSISTENT, which means that they remain until you explicitly clear them. If you have a filter applied and either navigate somewhere else or log out and log back in again, the filter will still be applied and you may not see the expected results (or anything at all for that matter). If you have filtered on multiple columns, you must clear each filter individually.

TRAINEE NOTES

Sorting a Record Log (All)

1. Navigate to the eCMS Object you wish to access (RFIs, Submittals, etc.)
2. Click ellipses in any column to filter by that column
3. Select **Sort Ascending** or **Sort Descending** to sort by that column



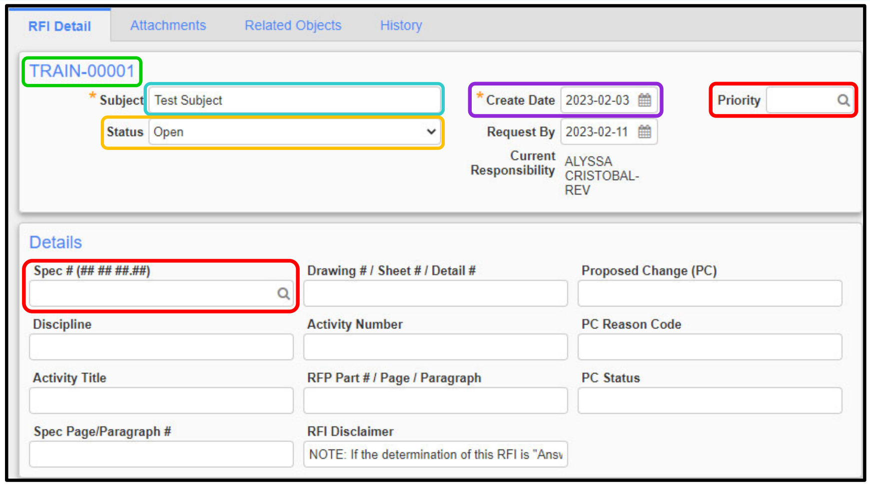


- A very large project may have hundreds of records and it could be very time consuming to scroll to the one you want. Sorting can be helpful for navigating these records:
  - Navigate to the Log you wish to access (RFIs, Submittals, etc.)
  - Click the ellipses in any column to filter by that column
  - Select **Sort Ascending** or **Sort Descending**
- You can only sort by one column at a time. When you sort in a second column, the new sort overrides your original sort.

TRAINEE NOTES

Entering Data (All)

- Types:
  - Auto-populated / Record Identifiers
  - Common data entry field (text / mixed / number)
  - Pick List / List of Values / Dropdown
  - Date Picker
  - Search Field
- Required fields (marked with asterisk)
- Character limits
- Data entry conventions
- File naming standards for attachments
- Saving / Submitting a record to enable additional data entry

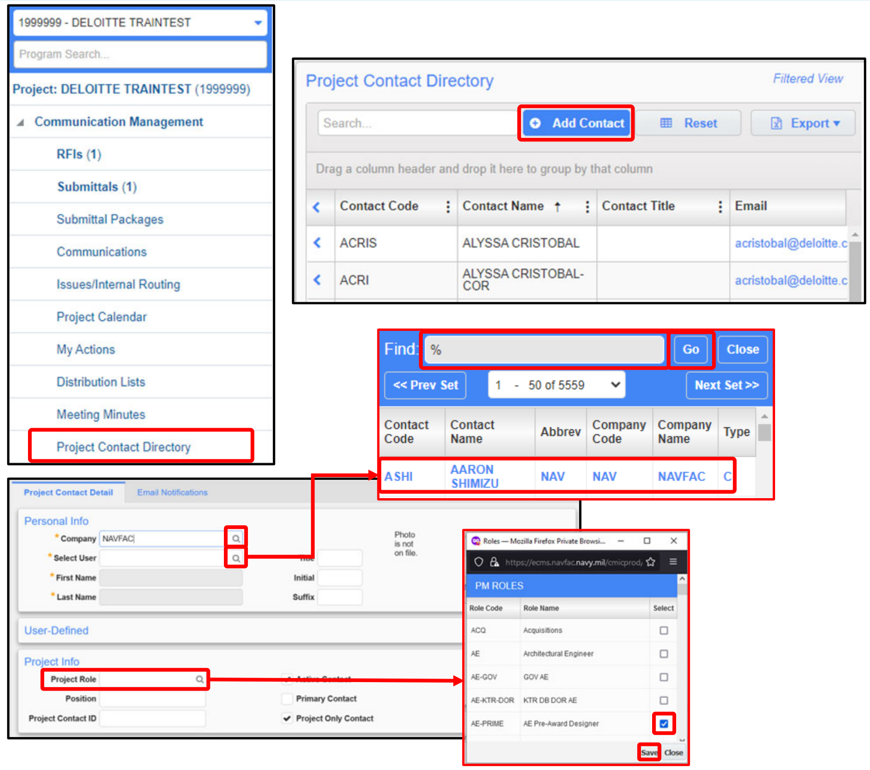


- eCMS incorporates a number of different data entry field *types*:
  - [GREEN] **Auto-populated / record identifiers** – when you create a new record, some fields are automatically populated with data. A subset of these are the record identifiers. It is generally best to accept the default values.
  - [BLUE] **Common fields** – you can enter any combination of text, numbers, and other characters.
  - [YELLOW] **Pick list / LOV / Dropdown** – you must choose one of the available values.
  - [PURPLE] **Date picker** – click the "calendar" icon and select a date.
  - [RED] **Search field** – when there are too many values to include on a pick list, clicking the magnifying glass will open a standard search screen where you can browse to or search for the desired value. If you do try to enter a value in the field that's not on the search screen, you'll get a "NULL ERROR" and red banner and will not be able to save the record
- Required fields are indicated by a yellow / gold star.
- SOME fields have character limits (i.e., the number of characters you can enter) – these vary by field.
- It's important to communicate with the Contractor around data conventions:
  - "We will always begin the field with these characters…"
  - "We will never use these characters in our data…"
- It's important to follow file naming conventions for all attachments (so they're easy to find) and also to never use prohibited characters in the file names. There is guidance in the eCMS Division 01 Specifications on naming conventions for attachments. The CM and KTR should coordinate to determine a naming convention that works for the project. In almost every case, when you create a new record in the system, you have to enter basic information, then either SAVE or SUBMIT the record before you can perform other actions.

TRAINEE NOTES

Adding Users to a Project (COR)

1. Ensure you have stepped into the correct project
2. Select **Project Contact Directory** from the Navigation Pane
3. Click **Add Contact**
4. Search for the correct Company (default is NAVFAC)
5. Search for User
6. Click **Save**

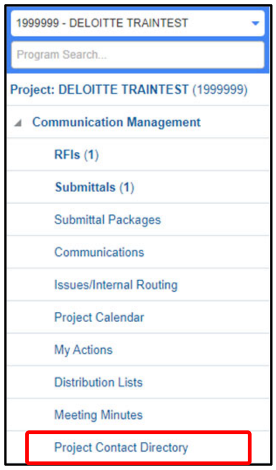


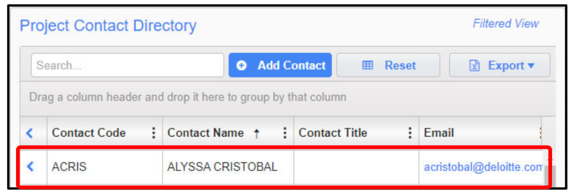
- BEFORE completing the User Account Request form, the COR must determine if the accounts already exist in eCMS. This can be accomplished using the User Lookup Dashboard detailed in Module 2. If the user account is NOT in eCMS, then add the user to the Access Request Form. Once you have used the User Lookup Dashboard to verify the user is in eCMS:
  - Ensure that you have stepped into the correct project.
  - Select **Project Contact Directory** from the sidebar
  - Click **Add Contact** at the top of the **Project Contact Directory**
  - Search for the proper Company (default is NAVFAC) that the user is a part of. To do this, click the magnifying glass on the right of the company box. Put the Company name between two '%'s (wildcard characters) to better encapsulate results with your search term.
  - After selecting the correct Company, search for the User through the Contact Code field.
- **NOTE:** A User that is already assigned to your project will not appear in the User search results.
- If you need to add a user to a project, but the user does not already have an account, then you must submit a User Account Request form to get the user added to eCMS.
- Perform quality control when adding a user. Ensure the user's contact info and Project Role is correct. The initial Project Role an account is created with will be the default for future projects. The CM or DM can update the Project Roles for contacts in the Project Contact Directory when adding existing eCMS users to a project. To do so, click the magnifying glass on the right of the Project Role box. Using the checkboxes, select the checkbox associated to the correct Project Role the user should hold.
- **NOTE:** Security Role permissions supersede Project Role permissions in terms of access and capabilities. In order to make use of the capabilities of a certain project role, you must have a security role of equivalent or greater permissions.

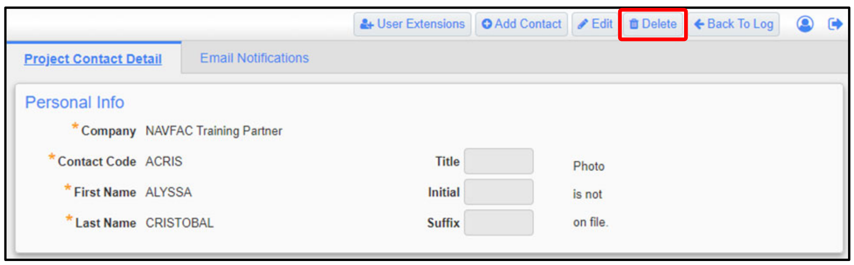
TRAINEE NOTES

Deactivating Users from a Project (COR)

1. Ensure you have stepped into the correct project
2. Select **Project Contact Directory**
3. Select the user you want to deactivate from the directory
4. Click **Delete**





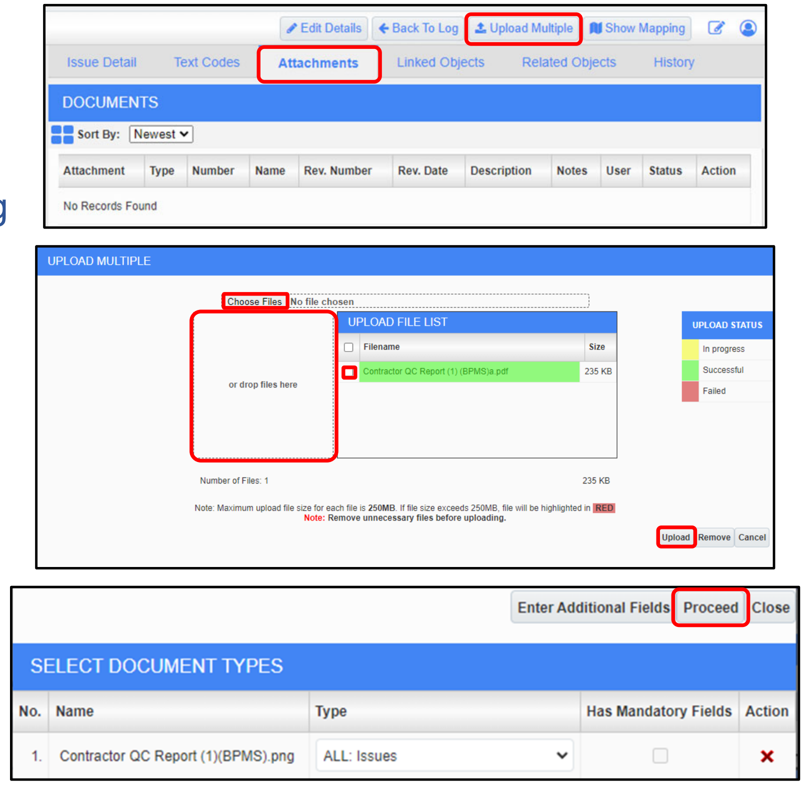


- Deactivating a user from your project is a simple process, but it carries significant ramifications.
- If the user being deactivated is a **NAVFAC** user, clicking the Delete button results in:
  - User can no longer be the addressee for records like RFIs or Submittals.
  - User can no longer be assigned as a Reviewer for records like RFIs or Submittals.
  - If user is already assigned to a record, then the user will continue to have access to those records as those records cannot be without an assignee.
- If the user being deactivated is a **Contractor** user, clicking the Delete button results in:
  - User will no longer have access to that project at all.
  - User will continue to exist on any existing records but will no longer have access to them.
  - If user is assigned to any "open" records, user's assignment to those records will need to be transferred to other users to prevent those records from having no assignee.
  - If this is the only project (or the last project) that the user had access to, user will no longer be able to access eCMS and will receive a notification that they do not have access to any projects in eCMS when attempting to log in.
  - If user IS assigned to other projects in eCMS, then user's access to those projects is unaffected.

TRAINEE NOTES

Adding an Attachment via Attachments Tab (All)

1. Navigate to desired object
2. Click **Attachments**
3. Click **Upload Multiple**
4. Click **Choose Files** or drag and drop the file(s)
5. The file color will change according to the upload status
6. Select **checkbox** to select file(s)
7. Click **Upload**
8. Click **Proceed**

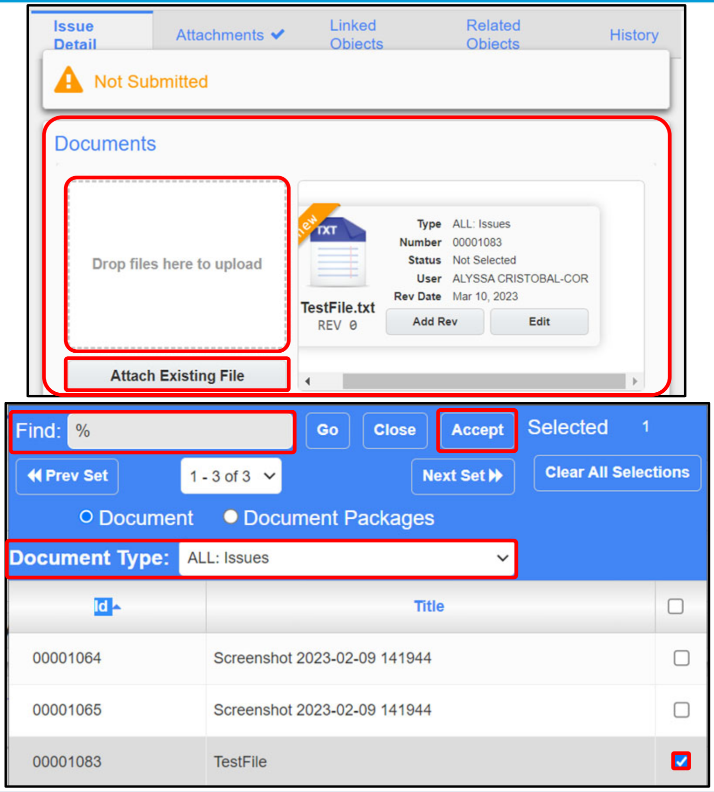


- Adding attachment(s) can be done one of two ways. The first, shown here, is to upload via the Attachments tab.
- You **MUST SAVE** the Object before you can add attachments. An attachment cannot be added to the record until the record "exists" in eCMS. When creating an object, the completed (but not necessarily submitted) record must already exist <u>before</u> you can add an attachment to it.
- Ensure you follow a rigorous, consistent file naming convention for all attachments. There is guidance in the eCMS Division 01 Specifications on naming conventions for attachments. The CM and KTR should coordinate to determine a naming convention that works for the project.
  - Filenames for attachments become hyperlink URLs in eCMS. Include only Uppercase, Lowercase, Numbers, Hyphens, Underscores, and Periods in your filenames. Do not include spaces or any "weird" characters in filenames.
- You can continue to add additional attachments at any time after you have submitted the Object.
- When you upload attachments, those attachments COULD be uploaded to many different folders within eCMS. It's important to not change the default folders for attachments or you might make the attachment "invisible" to other users (such as the Contractor). Always use the default setting if you are given a choice.

TRAINEE NOTES

Adding an Attachment via Documents Section (All)

1. Navigate to desired object
2. Navigate to **Documents** section in object **Detail** view
3. Drag and drop files to attach new files or click **Drop files here to upload** to choose files
4. Click **Attach Existing File** to search for and select an existing file
5. Select **Document Type**
6. Use **checkbox** to select files
7. Click **Accept**

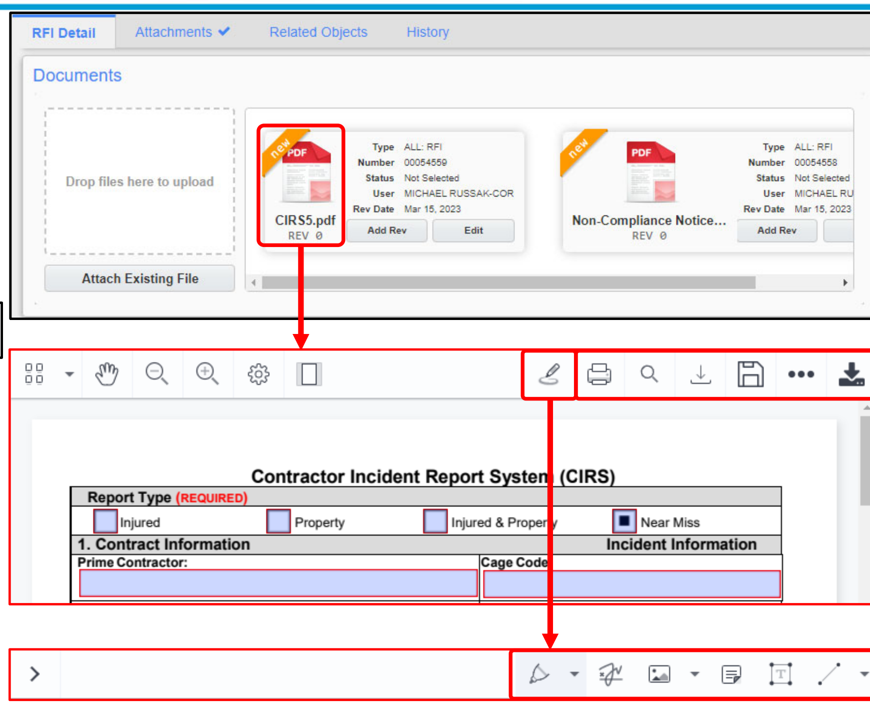


- Adding attachment(s) can be done one of two ways. The second, shown here, is to upload via the Documents section in the Detail view.
- You **MUST SAVE** the Object before you can add attachments. An attachment cannot be added to the record until the record "exists" in eCMS. When creating an object, the completed (but not necessarily submitted) record must already exist <u>before</u> you can add an attachment to it.
- Ensure you follow a rigorous, consistent file naming convention for all attachments. There is guidance in the eCMS Division 01 Specifications on naming conventions for attachments. The CM and KTR should coordinate to determine a naming convention that works for the project.
  - Filenames for attachments become hyperlink URLs in eCMS. Include only Uppercase, Lowercase, Numbers, Hyphens, Underscores, and Periods in your filenames. Do not include spaces or any "weird" characters in filenames.
- You can continue to add additional attachments at any time after you have submitted the Object.

TRAINEE NOTES

Opening Attachments (All)

- **PDF Attachments**
  1. Navigate to an object containing attachments
  2. Click the file icon to open attachment in PSPDF viewer
  3. Annotate using PSPDF tools
  4. Save PDF as new revision using the Save icon:
- **Non-PDF Attachments**
  1. Navigate to an object containing attachments
  2. Click the file icon to download attachment
  3. Annotate offline using desktop application
  4. Save new version to desktop and rename file
  5. Upload new version to eCMS



- Attachments can come in many different formats and file types but can be broken down into two types:

1. Non-PDF

- Follow the steps above to download the file to your PC, review using desktop applications, make edits, save a new version, and then reupload that new version to the eCMS record.

2. PDF

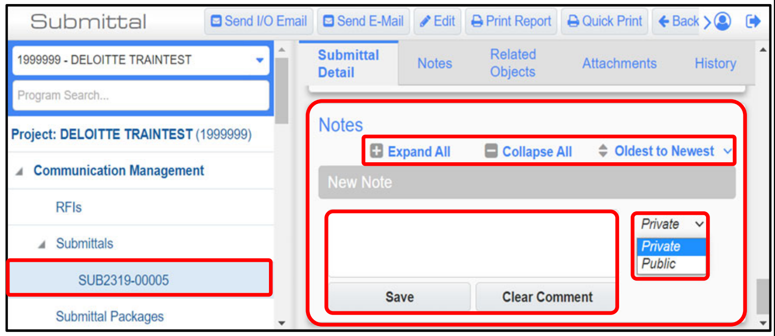
- With PDF attachments you gain much more functionality and flexibility. Upon clicking the file icon, a new window will launch – the PSPDF viewer. This viewer behaves similarly to PDF annotators you may be familiar with (Adobe Acrobat) and allow you to pan, zoom in/out, adjust page layout, print the PDF, download a copy local to your machine, and search the document, however, the most powerful feature of the PSPDF viewer lies in its ability to directly annotate the document and save that annotation as a revision within eCMS without having to download, edit, save, and re-upload to eCMS.
- To make use of these functions, select the draw icon. Once you have selected the draw icon you will be met with several familiar options, including the ability to draw/highlight, insert images, insert stamps (can create custom stamps as well), add notes, add text, and create shapes (for more information on the functionalities of the PSPDF viewer please see Module 10).
- After you have finished annotating to your liking, select the **Save** icon to save your annotations as a revision.
- Your annotation will appear as a new attachment and will appear in the documents on your project
- **NOTE:** The ONLY way to insert a proper, digital signature on a file is to download it, digitally sign it, then upload the signed version.

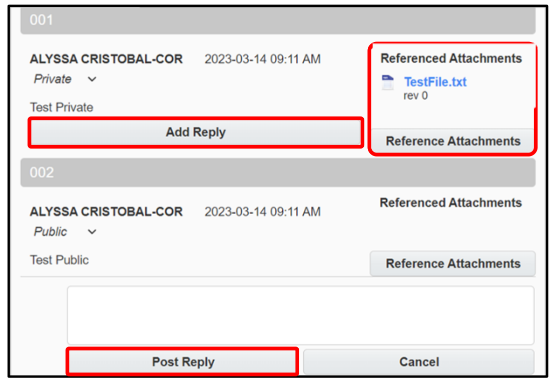
- If you would like to open a PDF from your browser's PDF viewer: Navigate to the Attachments Tab, right-click on the file name, and select "Open Link in New Tab" (see Module 10 for more detailed steps).

TRAINEE NOTES

Adding a Note (All)

1. Navigate to desired object
2. Navigate to **Notes** section in object **Detail** view
3. View previous notes and utilize buttons to filter the view of the notes
4. Create a new note and set the view to **Private** or **Public**
5. Click **Save**
6. Click **Add Reply** to respond to a previous note
7. Click **Reference Attachments** to view the attachments connected to the object
8. Click **Post Reply**



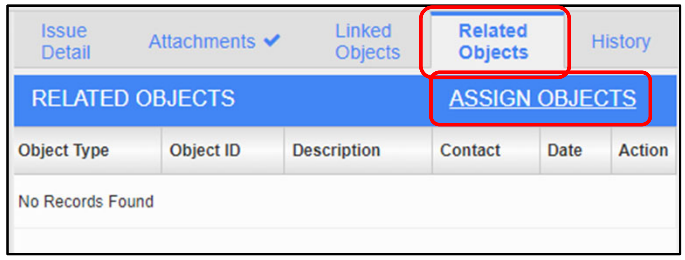


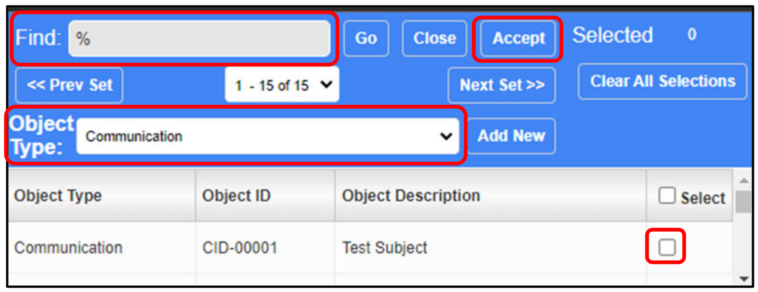
- Adding notes is a straightforward process that can be done one of two ways. The first, shown here, is to upload via the Notes Section in the object Detail view.
- You **MUST SAVE** the Object before you can add notes. A note cannot be added to the record until the record "exists" in eCMS. When creating an object, the completed (but not necessarily submitted) record must already exist before you can add a note to it. A user will not see the notes section in an Object appear until the Object is saved or submitted.
- You can continue to add additional notes at any time after you have submitted the Object.
- Once an Object is closed or voided, it is locked and can no longer be modified (including notes).
- Reference Attachments button is a helpful tool to reference any documents (must already be attached to the record) while you are creating a note.
- Remember that private Notes are not visible to the Contractor, but Public Notes are visible to the Contractor.
- If you want to comment on something and want your comment to only be visible to NAVFAC personnel, use a PRIVATE note (this is the default).
  - **Public** – Anyone can view this note, including KTRs.
  - **Private** – Visibility of this note is limited to NAVFAC employees.
- [KTR – All Notes should be public, any Notes (Private or Public) created by KTRs will be visible by all parties]

TRAINEE NOTES

Relating Objects (All)

1. Navigate to an eCMS Object Record
2. Click on **Related Objects**
3. Click on **Assign Objects**
4. Search or select the object you want to add
5. Click Accept



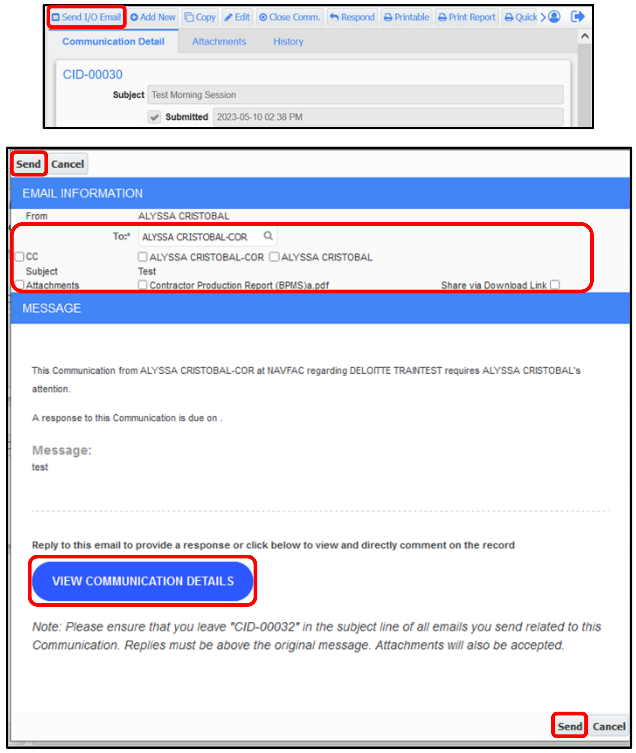


- When working with certain objects in eCMS (RFIs, Submittals, etc.), you may wish to indicate that the current record relates to another record in some way (an RFI relates to a Submittal). In this case, you can make use of **Related Objects** in eCMS, which is a method of "tying together" 2 or more eCMS objects.
- For 2 related eCMS Objects, they will appear on one another's Related Objects tab. For instance, if TEST_RFI is related to TEST_SUBMITTAL, TEST_SUBMITTAL will appear in the Related Objects tab for TEST_RFI, and TEST_RFI will appear in the Related Objects tab for TEST_SUBMITTAL. This is important to note because it shows that Relating Objects is a bidirectional procedure, meaning, if you relate an RFI to a Submittal, you do not need to then go relate that Submittal to that RFI, they will already be related.
- Relating Objects is a fairly straightforward process:
  - Navigate to an eCMS record
  - Select the Related Objects tab
    - **NOTE:** Related Objects are not available for *all* eCMS Objects but they *are* available for most
  - Select ASSIGN OBJECTS
  - Search for desired Object by Object Type, using keywords wrapped in % as relevant.
  - Select the Object(s)
  - Select Accept
- **NOTE:** Accessing documents that are uploaded to eCMS Documents but not attached to specific record can be done by creating a new record and using Related Objects to relate to those existing documents. For example, you can create a record in the Communications module with the subject "Linking to Design Documents" and use the Related Objects feature to relate all the documents you choose. The Object Type will be "Documents – [FileName]"

TRAINEE NOTES

Send IO Email (All)

1. Navigate to the eCMS Object you wish to access (RFIs, Submittals, etc.)
2. Click **Send I/O Email**
3. Search and select recipient in **To** field
4. Select recipient(s) in CC field (if applicable)
5. Select attachments and notes to include (if applicable)

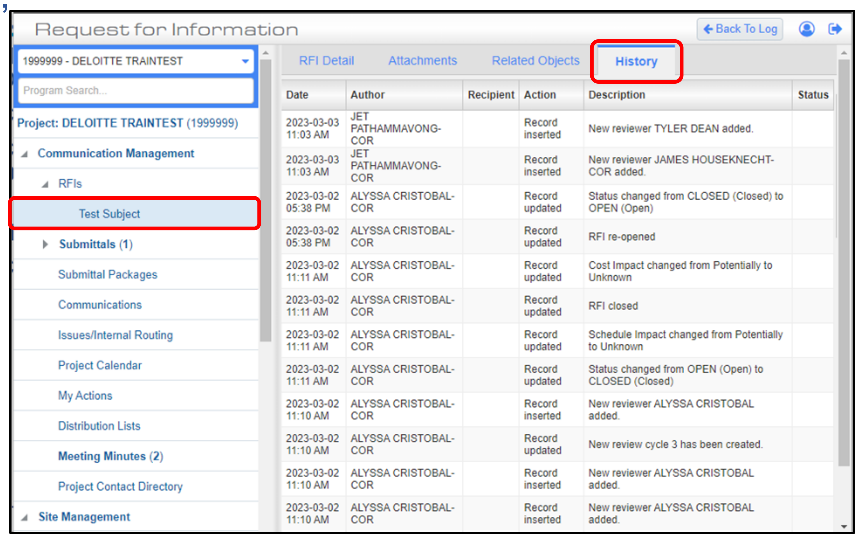


- Notifying your project contacts of collaboration on a record is very simple with the **Send I/O Email** button.
- Send I/O (Input/Output) Email allows a user to send an email notification to a project contact including details of the selected record and a direct link to access the object record.
- When you click **Send I/O Email**, an HTML version of the object is displayed a separate pop-up browser window. Choose the contacts you would like to send the IO email to and click **Send**. This feature also allows the user to indicate if CCs, notes, and/or attachments are to be included in the email.
- The user may also choose whether to attach the selected files to the email or send a download link for the attachments by checking the **Share via Download Link** checkbox.
- The Send I/O Email message cannot be edited directly; however it pulls data from the record detail that can be edited. To update the "Current Responsibility", a user can adjust the "To" field in the Receiver section of the Record.
- **NOTE:** Ensure that the browser being used is not blocking pop-ups from eCMS.
- **NOTE:** If attachments are more than 7MB, use the **Share via Download** checkbox.

TRAINEE NOTES

History (All)

1. Navigate to desired object (RFI, Submittals, etc.)
2. Select specific object
3. Click on **History**

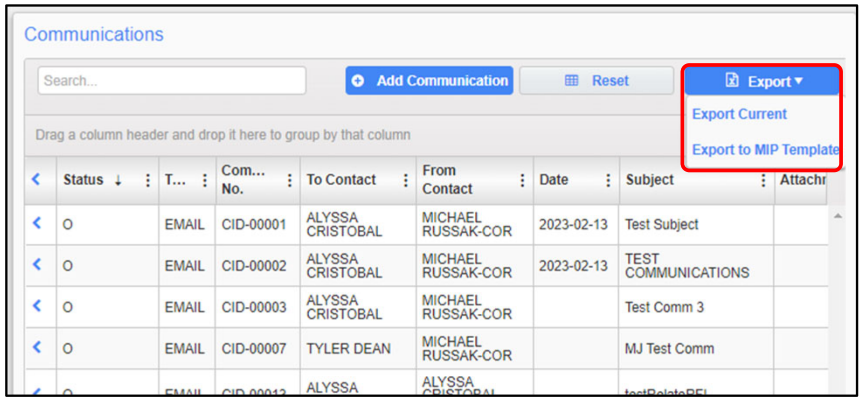


- The History tab displays an “audit trail” of everything that has happened with that record.
- When working with certain objects in eCMS (RFIs, Submittals, etc.), you may wish to view the history of the record.
- The history will display:
  - Date (YYYY-MM-DD, 12:00 AM)
  - Author (First name, last name)
  - Recipient
  - Action (E.g. Record inserted, updated, deleted, etc.)
  - Description (E.g. New Review XX added)
  - Status

TRAINEE NOTES

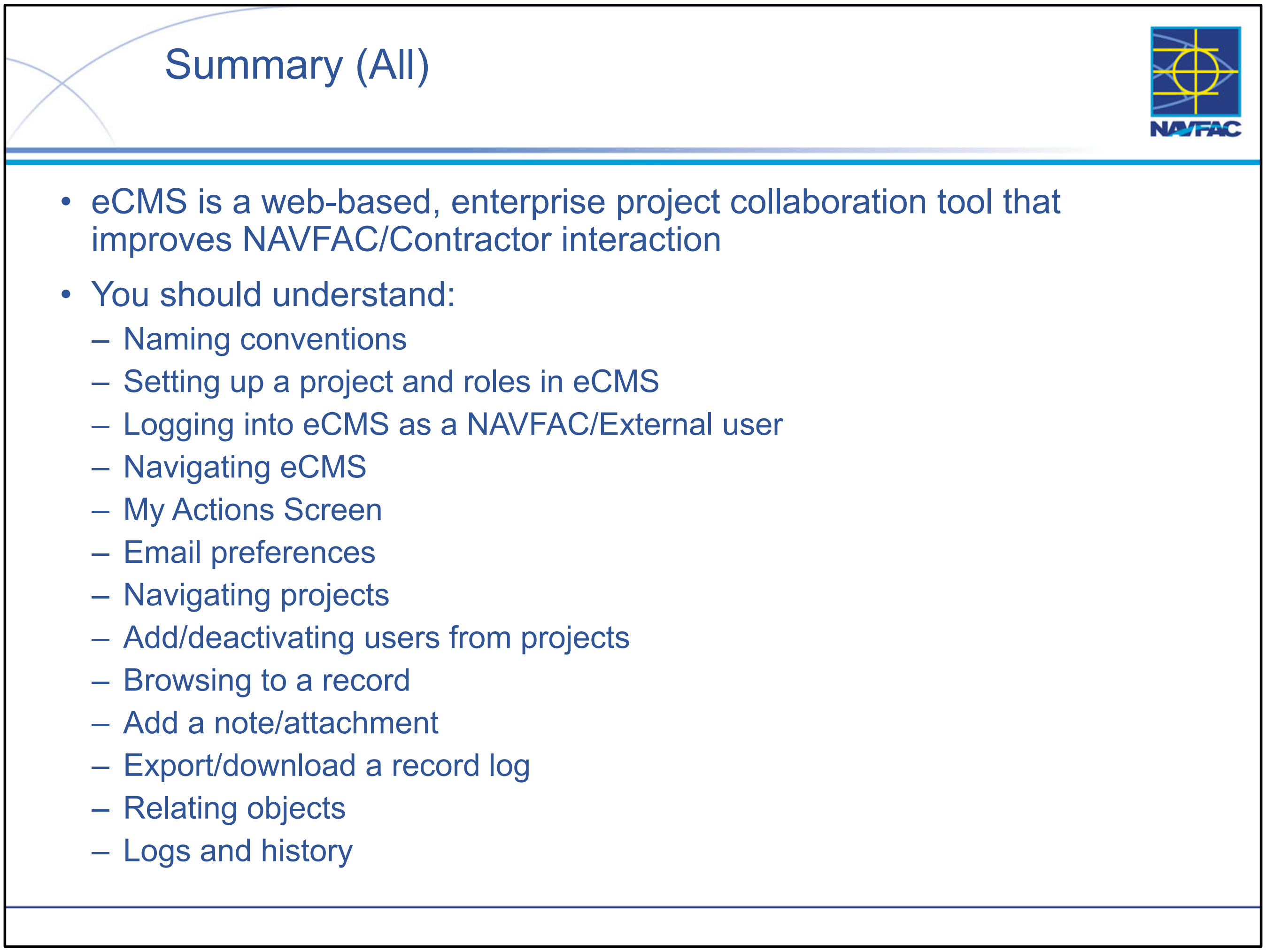
Exporting a Record Log (All)

1. Navigate to a Record Log with existing Records
2. Click the **Export** button to show the picklist for formats
3. Select **Export Current** or **Export to MIP Template** to download either an xlsx or csv of the log respectively
4. The file downloads automatically in the format of the selected option



- Exporting a Record log is very simple. Record logs which can be exported include RFIs, Submittals, Communications, Issues, Meetings, and the Project Contact Directory.
- This will only export the metadata and information of the log as a whole, exporting/downloading individual Records is a different process that though is similar between different types of Records, is still specific to each Record type. This process is detailed in each Record type's own module.
- The download is automatic once a format is selected:
  - **Export Current** corresponds to .xlsx formats which include cell and table formatting.
  - **Export to MIP Template** corresponds to .csv formats which do not include cell and table formatting.

TRAINEE NOTES



- Improves post-award management of schedules, RFIs, designs, submittals, etc
- Intended for GOV and KTR users associated with a project (provided at no cost to the KTR or other users)
- Reduces “hard copy” document volume and enables document tracking
- Provides data exchange with other NAVFAC systems (e.g., ieFACMAN)
- Use two browsers to log into two accounts

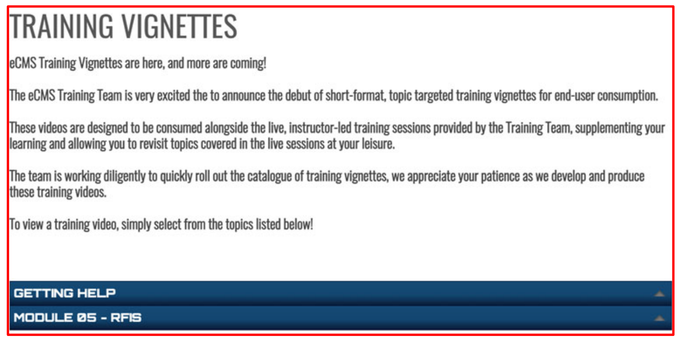
TRAINEE NOTES

Help Resources (All)

- NAVFAC resources:
  - NAVFAC eCMS Page
  - STS System:
    - Category → Application Support
    - Subcategory → eCMS - XX
  - Local Power Users
  - PDC Staff
- Externally accessible resources:
  - eCMS Public-Facing Site
  - Send email to nitcopswatch@us.navy.mil
  - Local Power Users
  - PDC Staff

Check out the new eCMS **Training Vignettes**!

Available on both the NAVFAC eCMS Page and eCMS Public-Facing Site



- Help resources are available for both NAVFAC users and External / Contractor users.
- Note that some help resources are accessible to Contractors (such as the Public-Facing Site) but ALL resources are accessible by NAVFAC personnel.
- Help resources are constantly being changed and updated – you should always "go to the source" and get the latest version of a help resource because the eCMS application and associated help tools could have changed since you last used them.
- **The eCMS Training Team is very excited the to announce the debut of short-format, topic targeted training vignettes for end-user consumption.** These videos are designed to be consumed alongside the live, instructor-led training sessions provided by the Training Team, supplementing your learning and allowing you to revisit topics covered in the live sessions at your leisure. The team is working diligently to quickly roll out the catalogue of training vignettes, we appreciate your patience as we develop and produce these training videos.

TRAINEE NOTES

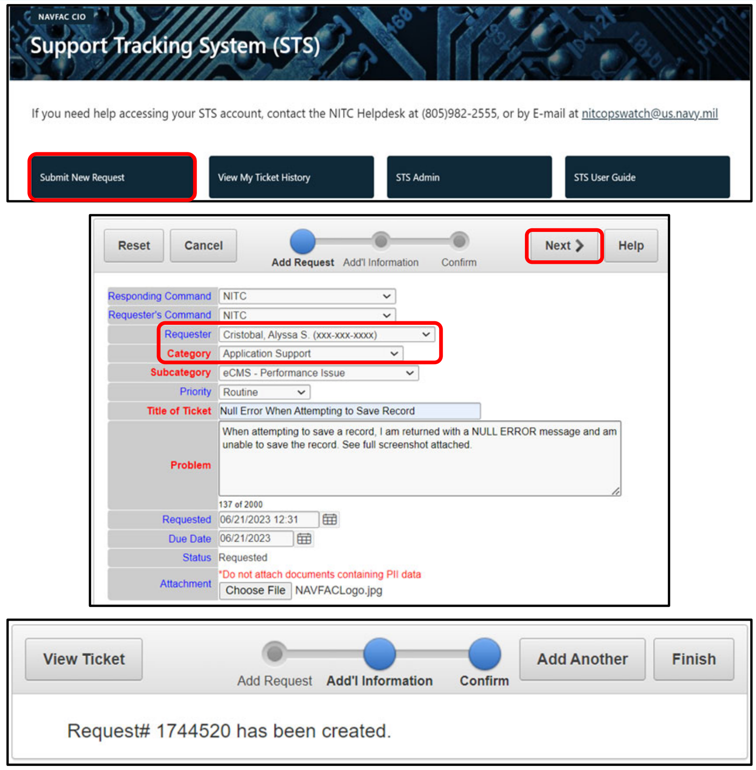
Requesting eCMS Help (All)

NAVFAC Users

1. Navigate to the [eCMS SharePoint Online Page]
2. Submit New Request
3. Fill in required information:
   a) Category = Application Support
   b) Subcategory = eCMS – XX
4. Attach supporting information: ie Full Screenshot
5. Select **Next** to submit ticket

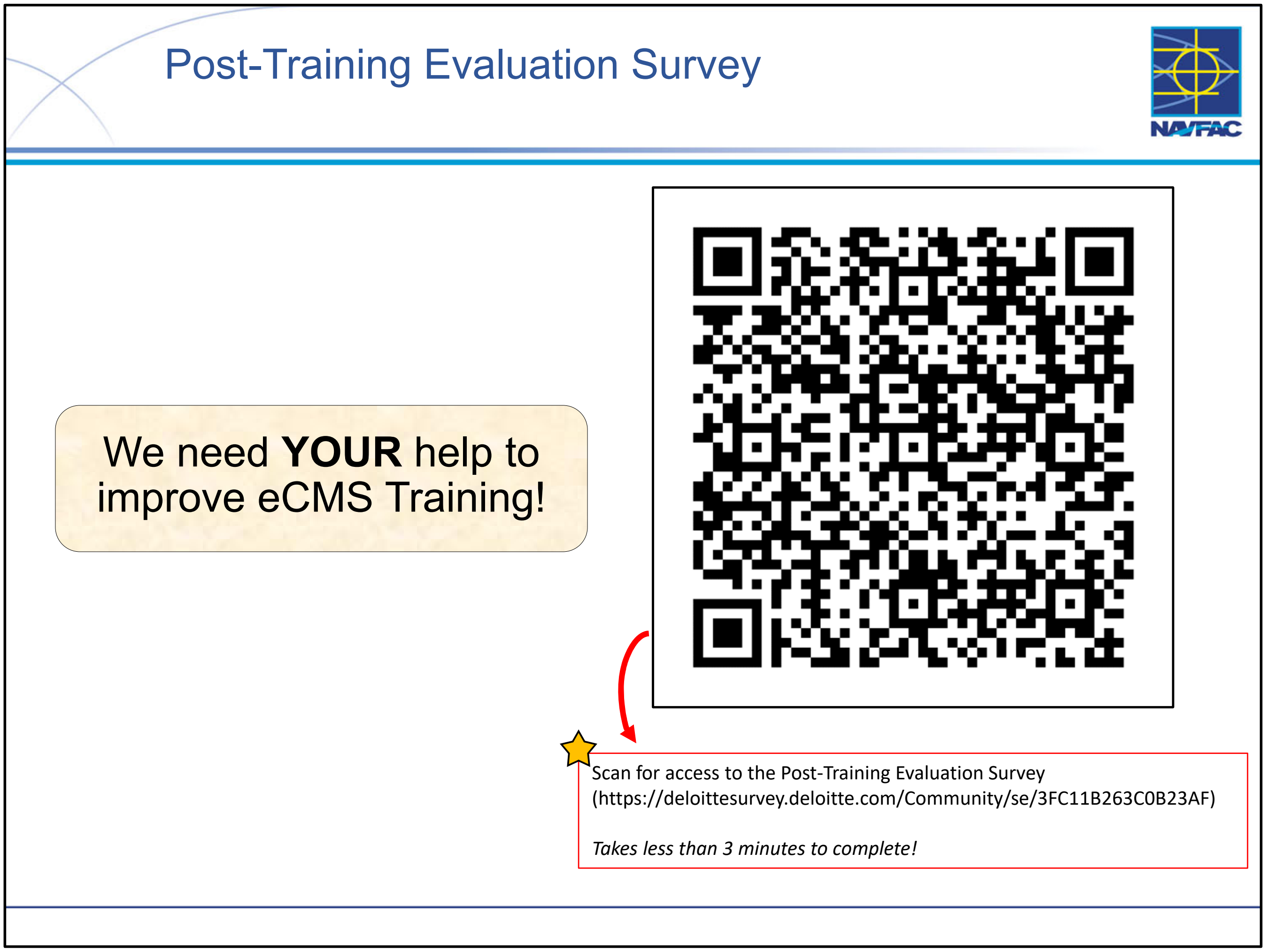
KTR Users

1. Send email to nitcopswatch@us.navy.mil
2. Attach supplemental information



- There are several reasons that you may need to request support concerning eCMS – You may need a new user or project created in the system, be experiencing technical issues/errors preventing your usage of the system, or may not be able to access the system entirely.
- The primary medium for requesting support is through [NAVFAC's Support Tracking System] (STS).
- If you do not have access to the STS Portal (if you are a KTR User), you can instead send an email directly to nitcopswatch@us.navy.mil.
- When submitting a help request through STS, either directly, or through NITC Ops Watch, there are certain pieces of information or attachments you must provide in order to effectively receive the help you require.
  - A detailed breakdown of what to include with your help request (via STS Ticket or email) can be found in the **eCMS Get-Help Guide.**
  - If you are experiencing technical issues/errors, attach a full-screen screenshot of your browser. Include your full name, User ID, Email address (associated with eCMS account) along with a detailed explanation of the issue you are experiencing.
  - If you are requesting a new project or user creation, make sure you are attaching the associated forms (these forms are found on the eCMS SharePoint Online Site and more information about them can be found in eCMS Training Module 1: Basics).
- **NOTE: NITC will REJECT submissions containing insufficient information.**

TRAINEE NOTES



- **This survey will take you less than 3 minutes to complete!**
- We want to hear from you!
- Taking a few minutes to complete our post-training evaluation survey is a powerful way to shape the future of our eCMS training curriculum.
- These insights help us understand what worked well, what didn't, and how we can improve to meet your specific needs.
- Your voice directly influences the design and content of our future training sessions, ensuring that we're delivering the most effective and relevant learning experiences. Your input is invaluable in making our training the best it can be.
- Thank you for being an essential part of this improvement journey!

- The post-training evaluation survey can be found by scanning the QR code on the slide, or following the link shown: (https://deloittesurvey.deloitte.com/Community/se/3FC11B263C0B23AF).

TRAINEE NOTES

Questions

What Questions do YOU Have?

TRAINEE NOTES

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