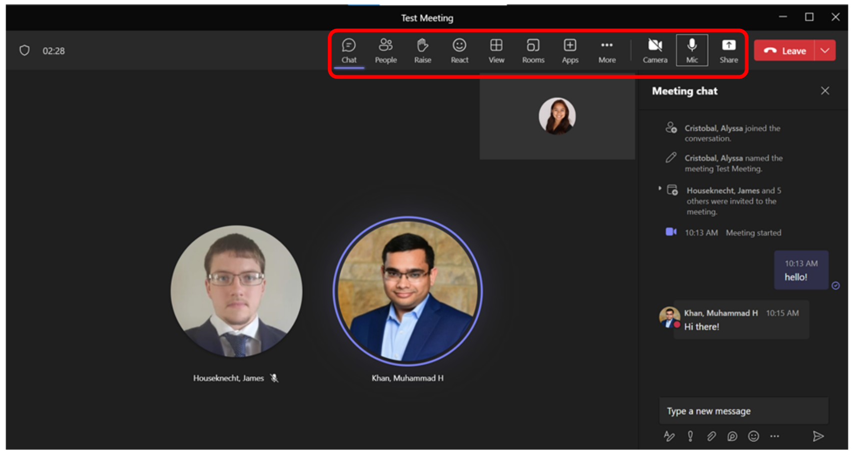
Teams Meeting Controls (ALL)

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 03: Communications (All)

This module includes the following topics:

- Introduction
- Communications Workflow
- Creating a Communication (Navigation Bar)
- Creating a Communication from another eCMS object (Submittal)
- Using an Existing Communication as a Template
- Responding to a Communication
- Closing and Reopening a Communication
- Printing a Communication
- Communication Workflow Recap
- 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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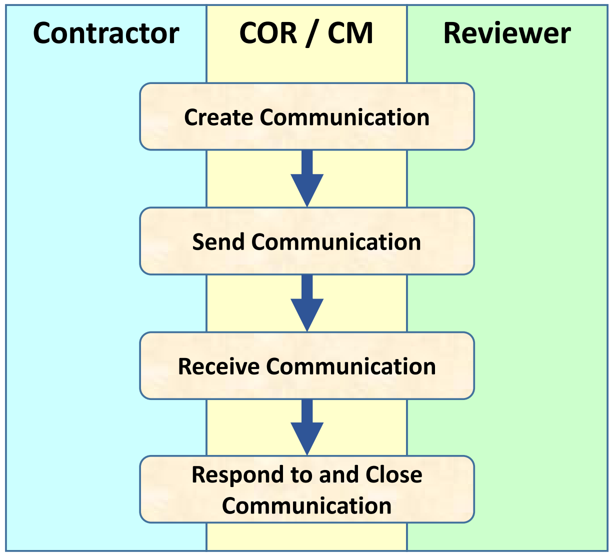
Introduction (All)

- The Communications module
  - Documents communications that are not part of other eCMS modules
  - Can act as a method to convey information or assign a task to a team member
  - Can be used to transmit other information / files (e.g., progress photos)
  - Can be used to memorialize prior communications (e.g., a telephone call in which the eCMS communication is a "record to file")
- Can be created two ways
  - Through navigation pane (Communication Management → Communications)
  - Through related objects
- Can be created by any role (COR, REV, KTR, etc.)
- Issues tracked on My Actions page*

- Communications can be used for many purposes in eCMS.
- As with many objects in eCMS, you can create a Communication from "either end." You can either create the Communication directly, or – if you are already in another eCMS record – you can create the Communication from there. For example, if you're in a Submittal record, you can create the Communication directly from there.
- One reason why Communications are so powerful is that they can be created by project personnel filling just about any role. Think of them as a replacement for eMail on your project.
- An important consideration with Communications is that they can be tracked on your My Actions screen or Action Items Dashboard. BUT this is only possible if a Due Date is entered when the Communication record is created.
- **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

Communications Workflow (All)

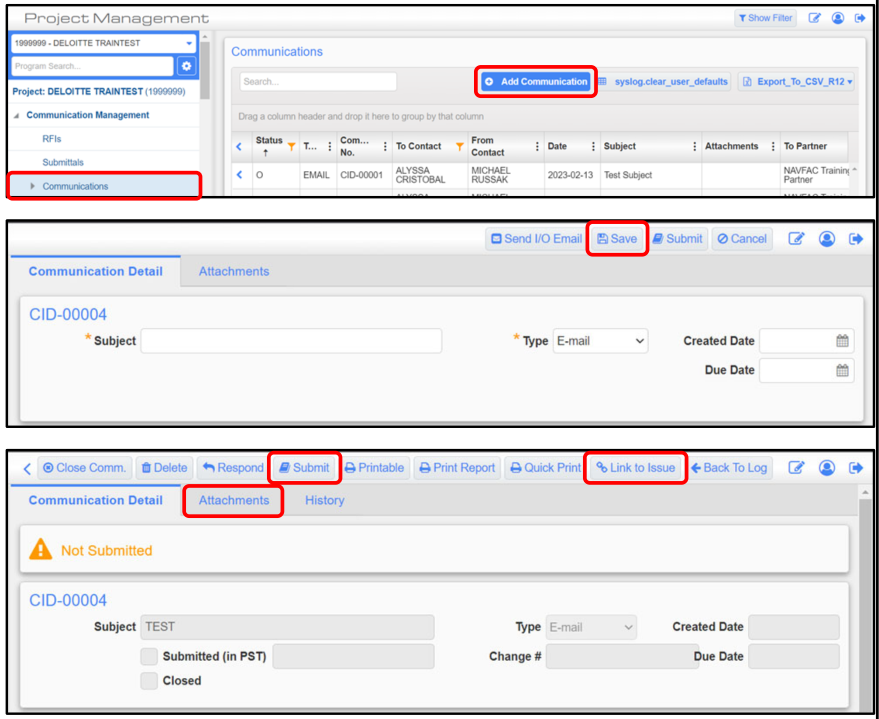


- The Communication workflow is very simple and applies to just about every role.

TRAINEE NOTES

Creating a Communication (Navigation Bar) (All)

1. Navigate to Communications
2. Click **Add Communication**
3. Complete Add Communication Form
4. Click **Save** to save without submitting
5. Add Attachments
6. Click **Submit** to save and make Communication available to recipient(s)

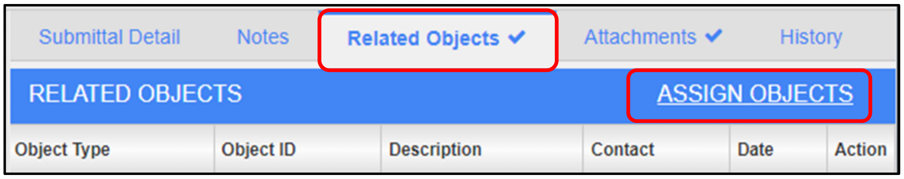


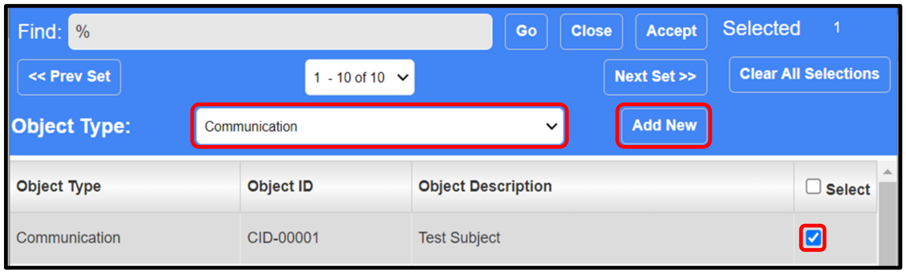
- The important thing to remember is that if you want to add attachments, you must first SAVE the Communication record. The completed (but not necessarily submitted) record must already exist <u>before</u> you can add an attachment to it.
- You can add additional attachments after the Communication record has been submitted.
- As previously mentioned, you can create a Communication many different ways:
  - As shown on the slide, you can create the Communication record directly.
  - You can create the Communication by navigating to a different object (for example a Submittal or a RFI record) and you can create the associated Communication directly from there.
- **NOTE**: Choose the Type that most correctly aligns with the Communication you are trying to memorialize (e.g., a telephone call, email, zoom call).
  - If the KO issues a letter of concern, upload a copy of the letter as an attachment and select type: “Letter”.
- **NOTE**: Difference between comments and messages:
  - Message: The message is the actual content of Communication; ie. the email message, text, what was said on the phone call, etc.
  - Comment: A comment is used as the backdrop for Communication; ie. the setting, context, or any additional explanation that helps someone with no context understand the message.
- **NOTE**: How to utilize the “Follow Up” features:
  - Click the Follow Up checkbox if a formal follow up is required.
  - The “Follow Up By” field will indicate this Communication record is in the user’s court for action.
  - The “Follow Up Notes” field is for the recipient of the Communication to populate notes (if applicable).

TRAINEE NOTES

Creating a Communication from another eCMS Object (Submittal) (All)

1. Navigate to and open Submittal
2. Click **Related Objects** tab
3. Click **ASSIGN OBJECTS**
4. Select **Object Type**
5. Click **Add New**
6. Complete Add Communication Form
7. Click **Save** to save without submitting
8. Click **Submit** to save and make Communication available to recipient(s)





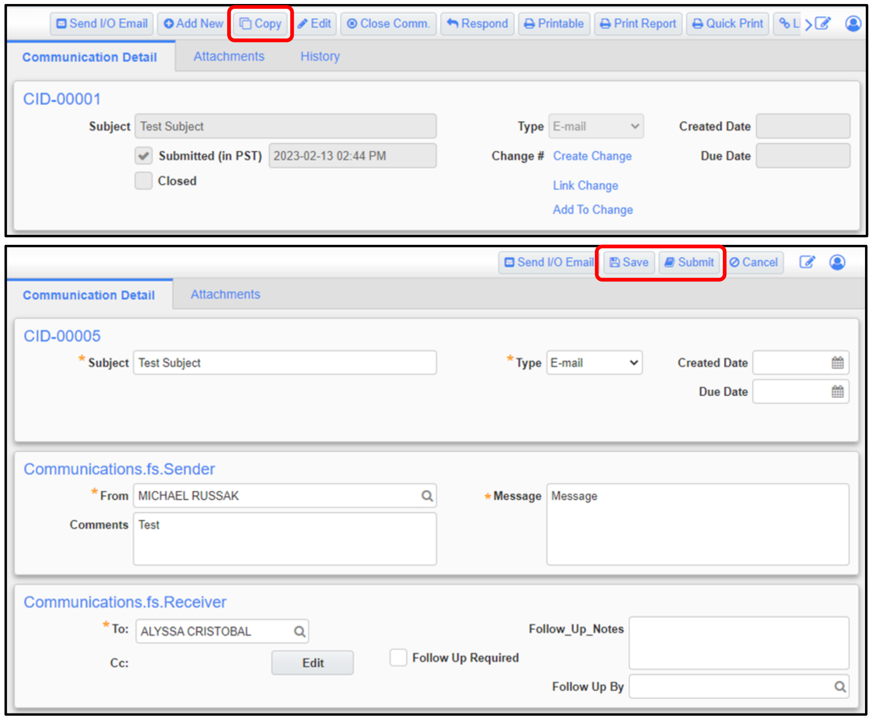
9. Locate the desired Communication and click the checkbox to select it
10. Click **Accept**

- eCMS is a system that manages "objects." An object could be a RFI, a Submittal, an Issue, a Communication, a Daily Report, etc.
- The most confusing part of the "relating" process is the screen you see when you click the ASSIGN OBJECTS. The resulting screen is very "busy" with many buttons, fields, and options.
  - First, you need to choose the type of object you want to relate to the Submittal.
  - Then, you need to find the specific object you want to relate, either by browsing through the list or by searching.
  - You can also **Add New** to create a new Communication and follow the steps to completing a Communication Form.
  - **NOTE:** If you save the Communication form, the window will close and you will need to navigate back to the Communications view via the navigation panel to add attachments and submit the form.
- **BEST PRACTICE:** Submit the Communication form to save and make available to recipient(s).
- **EMPHASIZE:** If you save the Communication form, you will need to navigate back to the Communications view via the navigation panel to add attachments and submit the form.
- **BEST PRACTICE:** Finally, after choosing the desired Object, you need to click a button (Accept) that is not located intuitively.

TRAINEE NOTES

Using an Existing Communication as a Template (All)

1. Navigate to and open a Communication
2. Click **Copy** button
3. Edit Communication record data
4. Click **Save** to save without submitting
5. Add Attachments
6. Click **Submit** to save and make Communication available to recipient(s)

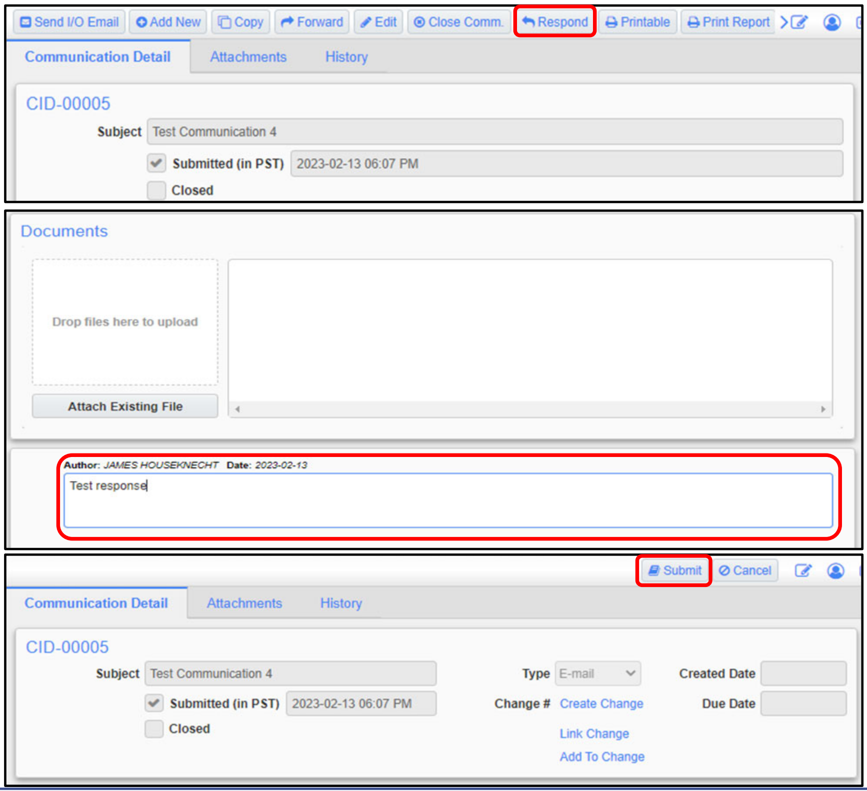


- If you have an existing Communication that you would like to use as a template (i.e., to "reuse" most of the content), it is quick and easy.
  1. Find and open the desired Communication.
  2. Click the Copy button to make a new copy of the Communication based on the original.
  3. Edit any or all of the fields.
  4. Save the Communication and make sure it says what you want it to say.
  5. Add Attachments to the new Communication record.
  6. Submit the completed Communication.
- Creating a Communication from an existing Communication utilizing the **Copy** feature will cause the fields for new Communication to prepopulate based on the Communication record you had created the **Copy** from. It is important to update/edit these required fields as relevant.
- **NOTE**: Add a Due Date if the Communication is to be tracked on the My Actions screen or Action Items Dashboard.

TRAINEE NOTES

Responding to a Communication (All)

1. Navigate to and open a Communication
2. Click **Respond**
3. Enter response
4. Select **Submit** to save the object and make available to recipient(s)

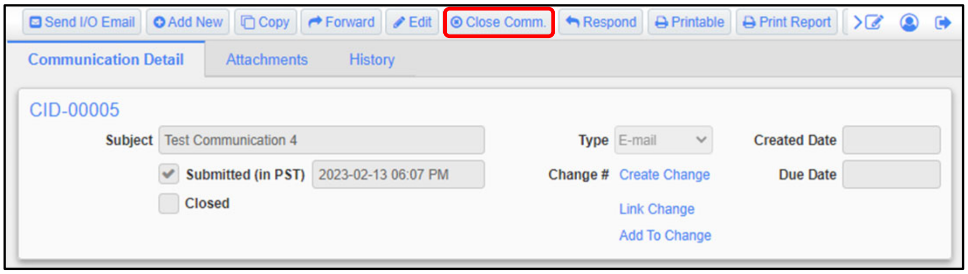


- Responding to a Communication is very straightforward.
  - Locate and open the Communication record.
  - Select **Respond**.
  - Enter your response in the Response field.
  - Select **Submit** to save the object and make available to recipient(s).
- **NOTE**: CORs and Reviewers can respond to any Communication in the project, whether or not they created it or it was directly sent to them.

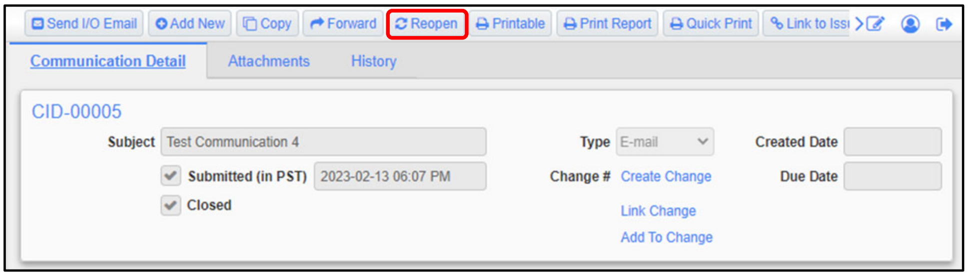
TRAINEE NOTES

Closing and Reopening a Communication (All)

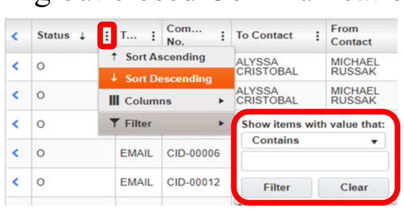
1. Navigate to and open a Communication
2. Click **Close Comm.**



1. Navigate to and open a Communication
2. Click **Reopen**



- When the Communication is complete, it can be closed.
  - Locate and open the Communication you want to CLOSE, click **Close Comm.**
  - When you do this, the Close Comm. button is changed to a Reopen button and a check appears in the Closed checkbox. The Edit and Respond buttons will also disappear as these actions can no longer be taken.
- Either party on a Communication can close the communication. Closing a Communication is important because Open Communications (with a Due Date) remain on your Action Items Dashboard until they're closed.
- **NOTE**: Contractors can only close/reopen Communications they have created. Reopening Communications may be necessary if additional information/documents may be required.
- **NOTE**: CORs and Reviewers can close any Communication in the project, whether or not they created it or it was directly sent to them.
- Reopening a Communication that has been closed is simple:
  - Locate and open the Communication you want to REOPEN (ensure that the Status column on the Communications log is not filtering out closed Communications).

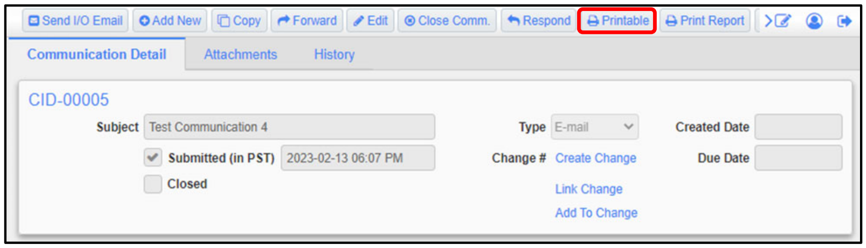


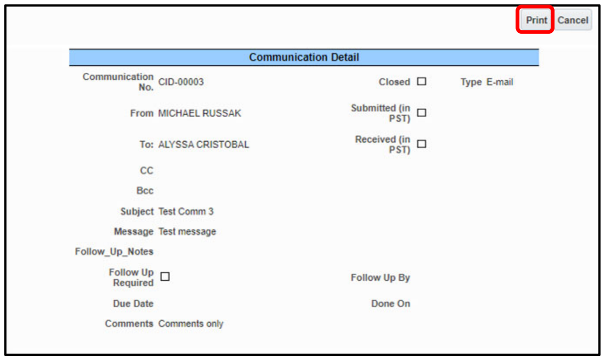
  - Click **Reopen.**
  - When you do this, the Reopen button is changed to a Close Comm. Button and a check disappears in the Closed checkbox. The Edit and Respond buttons will also appear as these actions can be taken.

TRAINEE NOTES

Printing a Communication (All)

1. Navigate to and open a Communication
2. Click **Printable** button to open PDF version of the Communication in a new browser window
3. Click **Print**

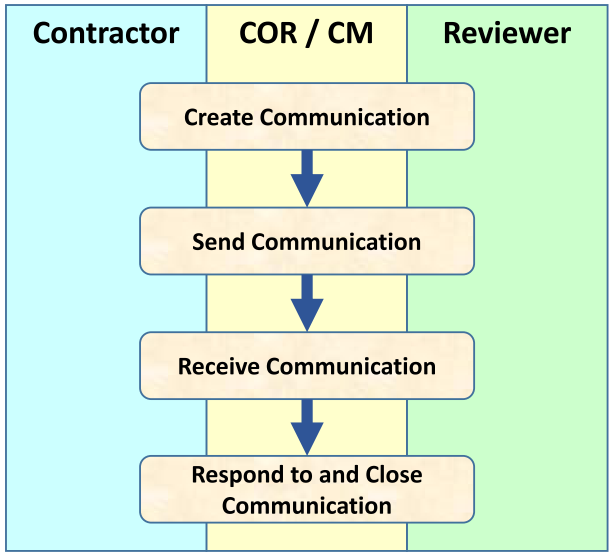




- Printing a Communication is very simple with the **Printable** button.
- When you click **Printable**, a printable version of the Communication is displayed in a separate pop-up browser window. Clicking the Print in that window will open a prompt to either print the Communication as a hard copy or save as a PDF file locally.
- Ensure that the browser being used is not blocking pop-ups from eCMS.
- **LESSON LEARNED:** If you want to save the file as a PDF to your computer, select **Microsoft Print to PDF** as your printer. This works <u>much</u> better than the **Adobe PDF** printer.

TRAINEE NOTES

Communication Workflow Recap (All)



TRAINEE NOTES

Summary (All)

- Communications are powerful tools to keep users aware of what's going on with the project – they preserve a record of project activities *with the project* instead of outside the project as with conventional Outlook eMail
- The Communications workflow is one of the simplest in eCMS
- Communications records can be created by just about anyone
- The Communications screen enable you to both create a new Communications and to manage existing Communications throughout their lifecycle
- Relating enables you to establish relation to other eCMS objects that are germane to the Communications

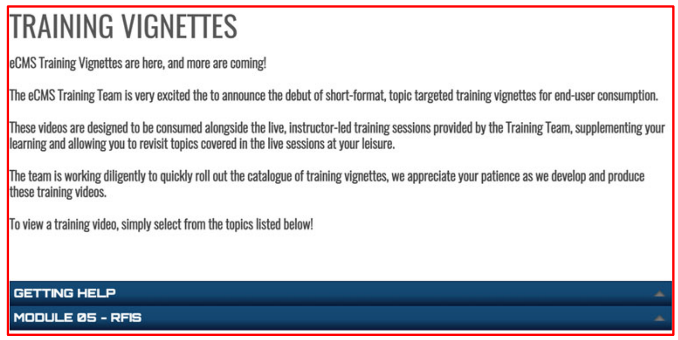
TRAINEE NOTES

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


TRAINING VIGNETTES

eCMS Training Vignettes are here, and more are coming!

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.

To view a training video, simply select from the topics listed below!

GETTING HELP

MODULE 05 - RFIS

- 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

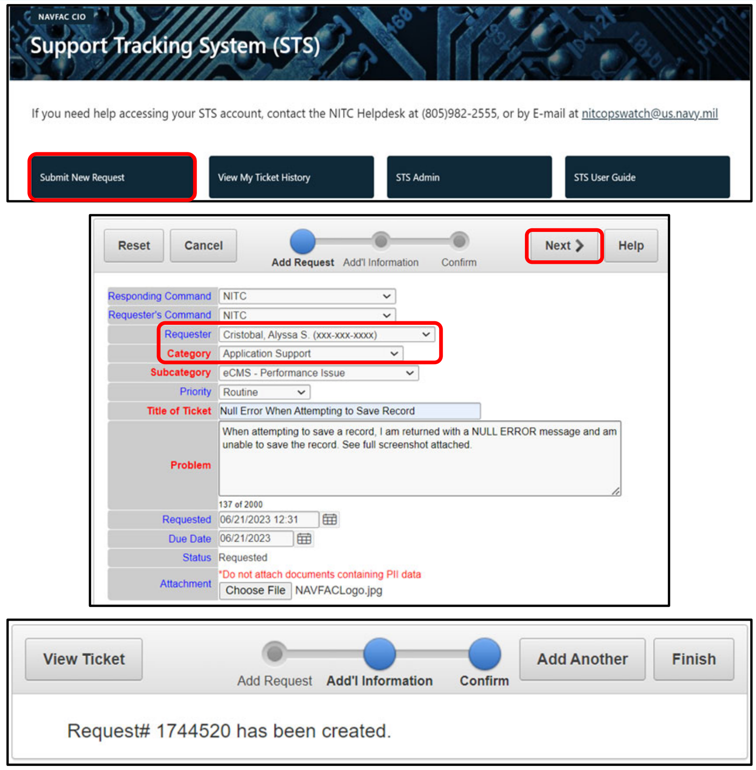
Requesting eCMS Help (All)

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

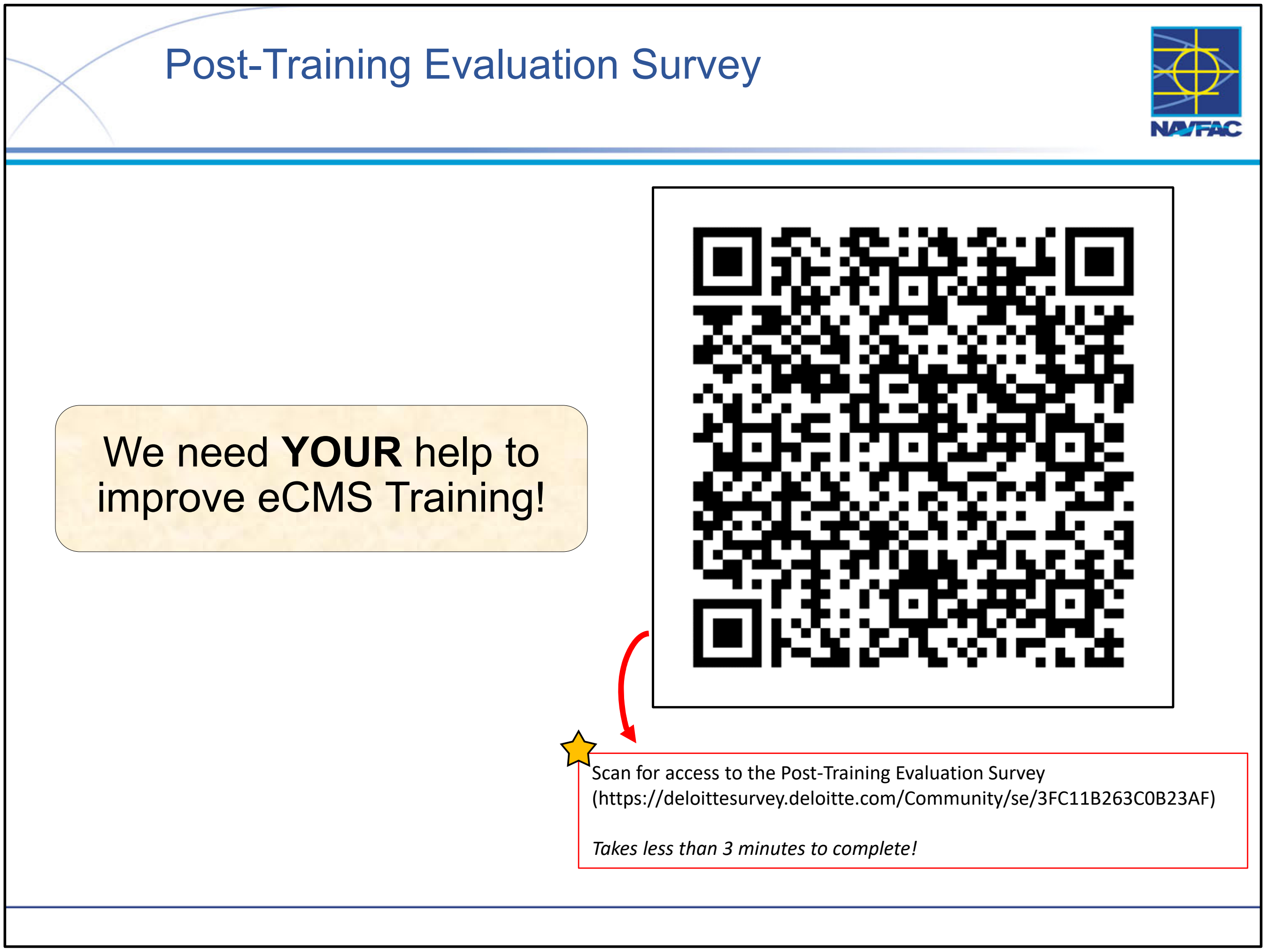
KTR Users

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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