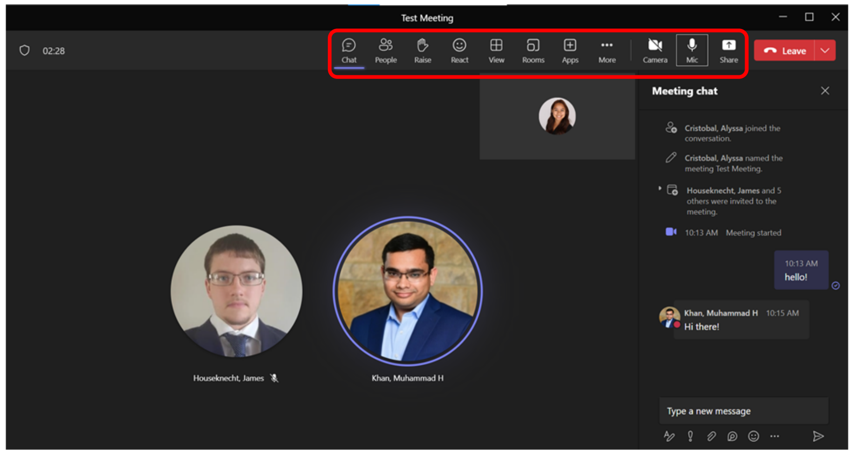
Teams Meeting Controls (All)

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 04: Issues

This module includes the following topics:

- Introduction
- Issues Workflow
- Creating an Issue (Navigating Bar)
- Creating an Issue from another eCMS Object (Submittal)
- Government Internal Issue (NAVFAC User)
- Tracking and Editing Issues
- Resolving and Closing Issues
- Adding a Note(s) to an Issue
- Printing an Issue
- Exporting an Issue Log
- Issues 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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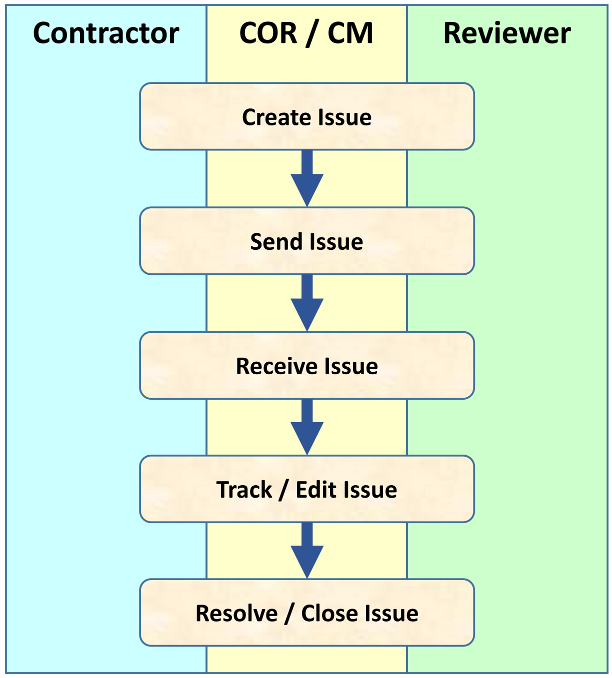
Introduction (All)

- Used to
  - Document potential problems that may result in a project change
  - Convey technical information on reports
  - Link concerns to specific RFIs or Submittals
- Can be created several different ways
  - Through navigation pane (Communication Management → Issues/Internal Routing)
  - Through related objects
  - From *some* Checklists
- Can be created by any role (COR, REV, KTR, etc.)
- Track issues from inception to resolution
- Issues tracked on My Actions page and Dashboards

- Issues can be used for many purposes in eCMS.
- As with many objects in eCMS, you can often create an Issue from "either end." You can either create the Issue directly, or – if you are already in a related object record – you can create the Issue from there. For example, if you're in a Submittal record, you can create the Issue directly from there.
- One reason why Issues are so powerful is that they can be created by project personnel filling just about any role.
- An important consideration with Issues is that they can often take time to fully resolve. The Issue record enables you to keep track of "what's happening" with the Issue from beginning to end.
- **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

Issues Workflow (All)

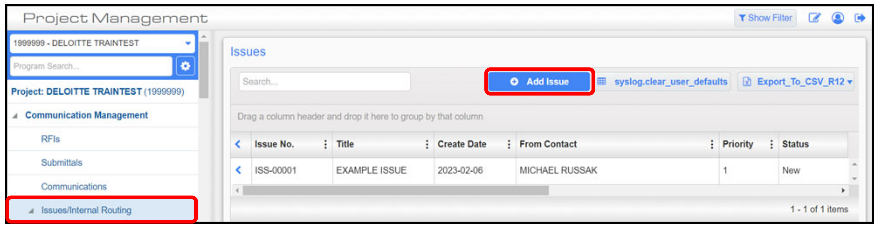


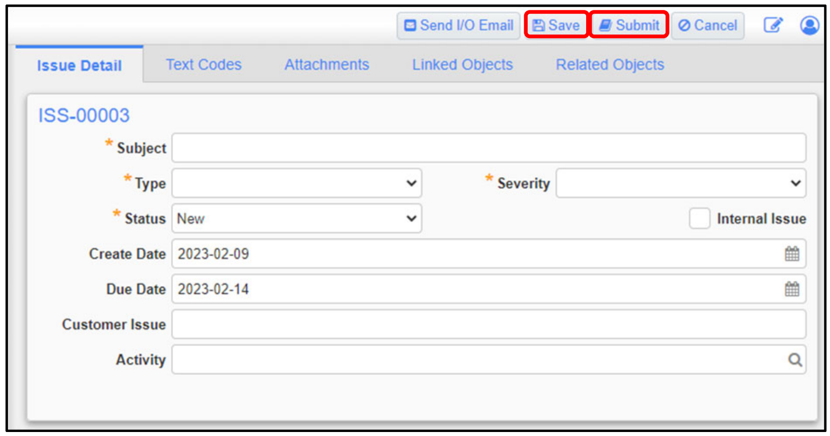
- The Issue workflow is very simple and applies to just about every role.

TRAINEE NOTES

Creating an Issue (Navigation Bar)

1. Navigate to Issues/Internal Routing
2. Click **Add Issue**
3. Complete Add Issue Form
4. Click **Save** to save without submitting
5. Add Attachments, Link to other object(s), or Relate to other object(s)
6. Click **Submit** to save and make Issue available to recipient(s)



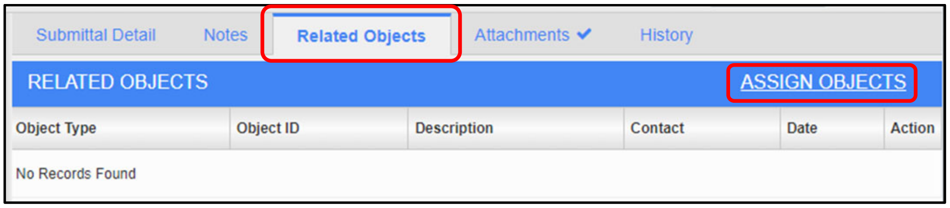


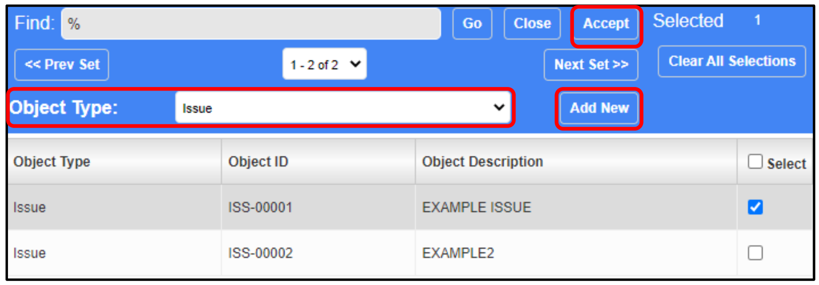
- Adding a new Issue is very straightforward. The important thing to remember is that if you want to add attachments or link/relate the Issue to other eCMS objects, you must first SAVE the Issue record. The completed (but not necessarily submitted) record must already exist before you can add an attachment to it or before you can link/relate another object to it.
- You can create an Issue many different ways:
  - As shown on the slide, you can create the Issue record directly.
  - You can create the Issue by navigating to a different object (for example a Submittal or a RFI record) and you can create the associated Issue directly from there.
- When selecting an Issue Type, note that the numbered items at the top of the picklist correspond to the CPARS rating categories. This makes it easy to flag Issues, their narratives, and their resolutions for later incorporation as evidence when writing a CPARS annual or final narrative.
- When creating an Issue, note the difference between the "To" field and the "Responsibility" field – the "To" field identifies the person to whom the Issue is being sent while the "Responsibility" field identifies the person responsible to address / resolve the Issue.

TRAINEE NOTES

Creating an Issue from another eCMS Object (Submittal) (All)

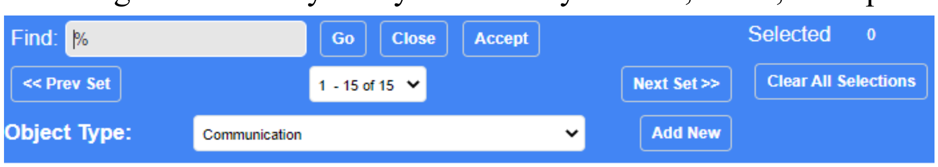
1. Navigate to and open a Submittal
2. Click **Related Objects** tab
3. Click **ASSIGN OBJECTS** link
4. Select Object Type
5. Click **Add New**
6. Complete Add Issue Form
7. Click **Save** to save without submitting
8. Add Attachments, Link to other object(s), or Relate to other object(s)





9. Click **Submit** to save and make Issue available to recipient(s)
10. Locate the desired Issue and click the checkbox to select it
11. 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 link. The resulting screen is very "busy" with many buttons, fields, and options.

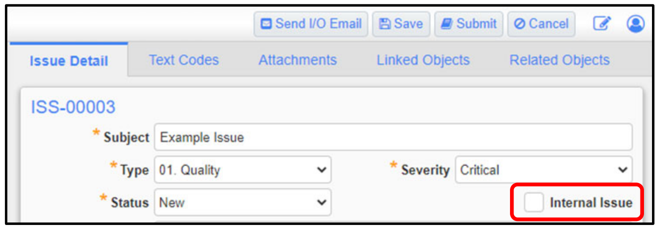


- First, you need to choose the type of object you want to relate to the Submittal.
- Then, you need to find the specific object you want to relate, either by browsing through the list or by searching.
- Finally, after choosing the desired Object, you need to click a button (Accept) that is not located intuitively.
- Note that if necessary, you can relate and issue to several objects at once.
- **LESSON LEARNED**: You can create a new object that you can relate the Submittal to, but you can ONLY do this if you have permission to create that object. For example, you cannot create a new Submittal using the Add New button because CORs do not have permission to create Submittal records.

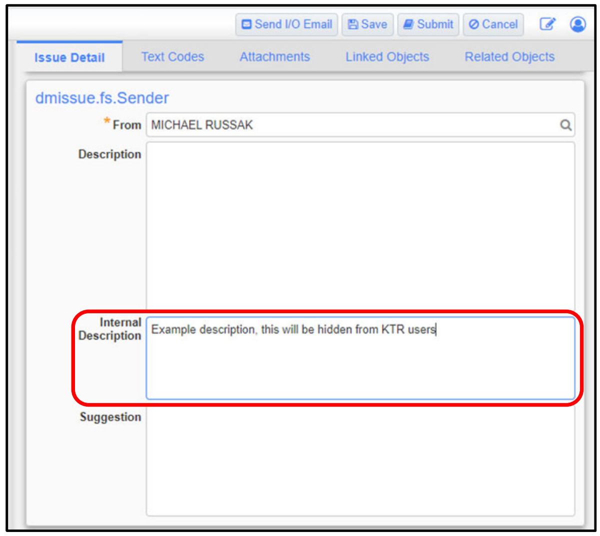
TRAINEE NOTES

Government Internal Issue (NAVFAC User)

- When a NAVFAC user (COR, REV, etc.) adds an Issue they have the option to select the **Internal Issue** checkbox
- Selecting **Internal Issue** will only allow NAVFAC users to see the Issue; it will be hidden from KTR users.



- Similarly, when a user fills out the **Sender** field for the Issue, they have the option to include an **Internal Description** that only NAVFAC users can see; it will be hidden from KTR users.

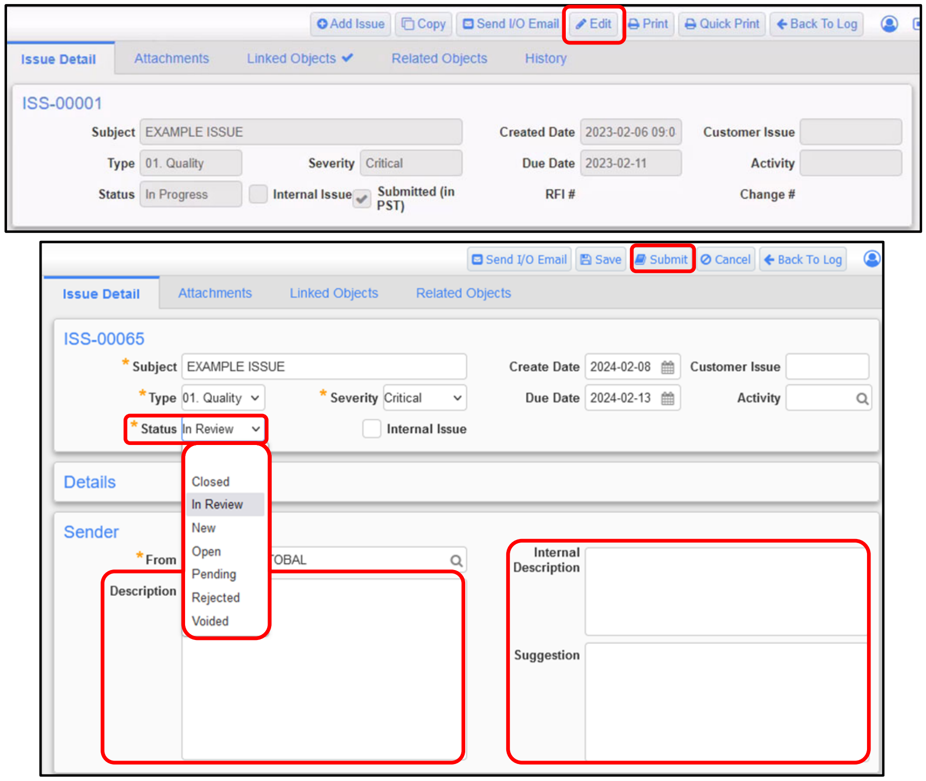


- This feature of Issues makes it more powerful as it allows NAVFAC personnel to keep track of items that they do not want to be visible to the contractor. This allows for the partitioning of Issues from KTRs both for Issues associated with other eCMS Objects and standalone.
- This allows NAVFAC users to keep track of "what's happening" without including the KTR.
- **NOTE:** If an Issue is saved without **initially** checking the Internal Issue checkbox, it will become a public issue, visible to KTR users. If the Internal Issue checkbox is selected in subsequent edits of the Issue, the Issue will remain visible to KTR users.

TRAINEE NOTES

Tracking and Editing Issues

1. Locate and open Issue
2. Add Attachments, Link to other object(s), or Relate to other object(s)
3. Click **Edit**
4. Update **Status**
5. Edit **Description information** or add **Notes**
6. Click **Submit** to save and make Issue available to recipient(s)

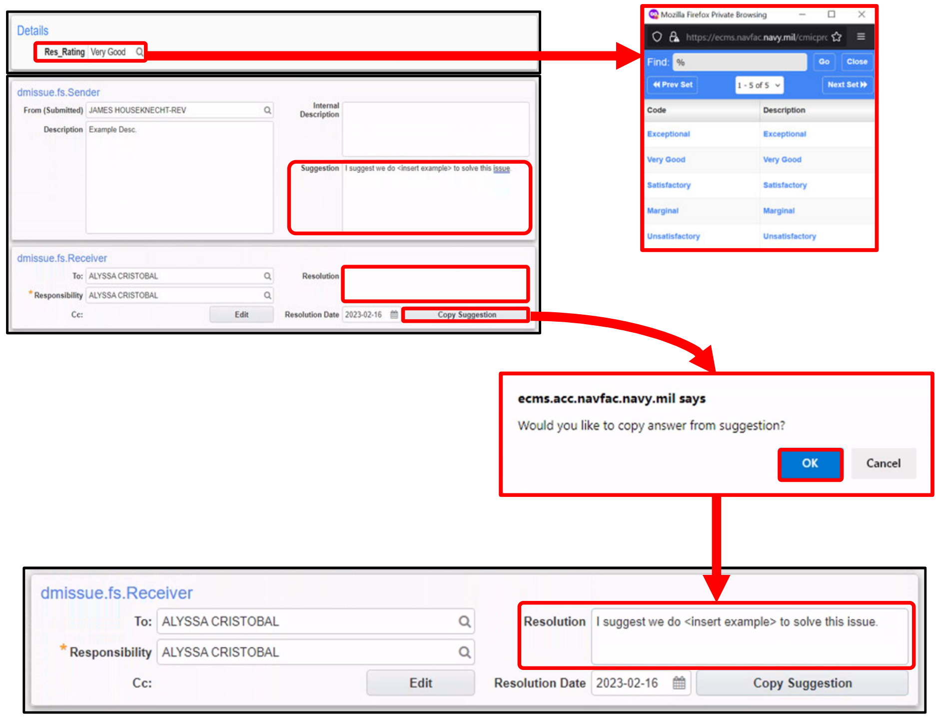


- Tracking and editing Issues in eCMS is a very straightforward process:
  - Navigate to the Issue and open it
  - Add any Attachments, Link/Relate to other Objects if necessary.
  - Update Status, Description information, Notes, and Recipients as necessary.
- **NOTE:** When editing an existing issue, the only option available is to **Submit** to save the issue and make it available to recipient(s)**.**
- **GOOD PRACTICE:** Keep track of "what's going on" with the Issue and its resolution in the Internal Description field or using Private Notes. If you add the resolution actions as individual line items, prefaced with the date entered and with the most recent at the top, then you can quickly see the status of any Issue by reviewing one field.
- [KTR – All Notes should be public, any Notes (Private or Public) created by KTRs will be visible by all parties]

TRAINEE NOTES

Resolving and Closing Issues

1. Locate and open Issue
2. Update **Status** to **Closed**
3. Add **Resolution** and **Resolution Date**
4. (Optional) Click **Copy Suggestion** to copy Suggestion from Sender
5. Click **Submit** to save and make available to recipient(s)

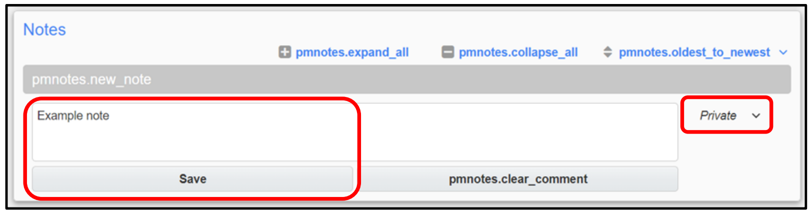


- When an Issue can be resolved, the user can Resolve and Close the Issue in a very simple way:
  - Navigate to the Issue and open it
  - Navigate to the Receiver section of the Issue
  - Update Receiver, Responsibility, Resolution, and Resolution Date
  - Select Submit
- The system will automatically change the type from New to Open once submitted. To acknowledge receipt, the receiver, if authorized, should change the status to In Review.
- After resolution of the Issue, the Status may be changed to Closed or Rejected. Rejected is used when the response is not sufficient and requires another Issue.
- The Response Rating field is meant to capture a measure of the quality of response or resolution provided by the other party. This field can be useful for later incorporation as evidence when writing a CPARS annual or final narrative.
- **NOTE:** The Resolution Date will populate automatically but is editable.
- **NOTE:** As demonstrated in the slide above, if you would like to copy the Suggestion proposed by the Sender, you can make use of the **Copy Suggestion** button. Popups **must** be enabled in browser to take advantage of this feature.

TRAINEE NOTES

Adding a Note(s) to an Issue

1. Navigate to an open Issue
2. Navigate to the bottom
3. Add any relevant notes in the **Notes** section (if applicable)
4. Choose to make the **Note Public** or **Private**
5. Select **Save**

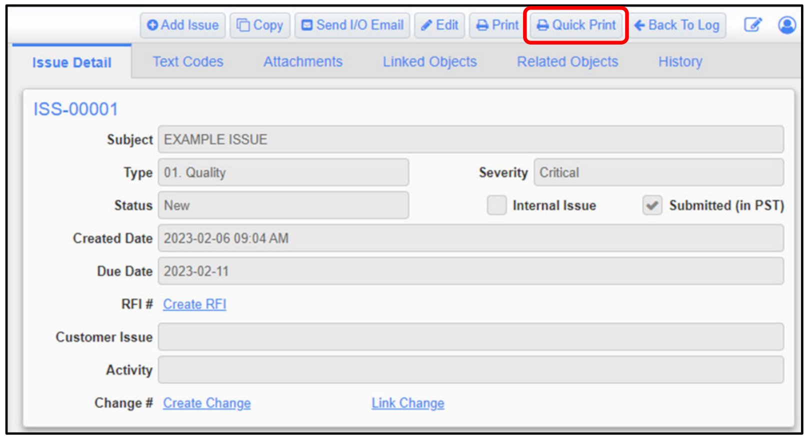


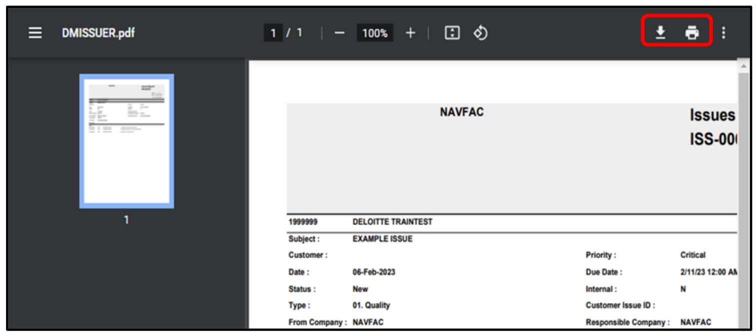
- The important thing to remember is that if you want to add attachments or link/relate the Issue to other eCMS objects, you must first SAVE the Issue record. The completed (but not necessarily submitted) record must already exist before you can add an attachment to it or before you can link/relate another object to it.
- You **MUST SAVE** the Issue before you can add attachments. An attachment cannot be added to the Issue record until the record "exists" in eCMS. Although you have entered a lot of information on the Issue Details screen, the record does not "exist" until you have saved it.
- When adding a Note, the Reviewer has the option to make the note **Public** or **Private**.
  - **Public** – Anyone can view this note.
  - **Private** – Visibility of this note is limited to internal employees.
- If you have multiple Attachments and your note refers to only one of them, you can use the Reference Attachments button to explicitly identify the Attachment(s) that your note is in reference to.
- [KTR – All Notes should be public, any Notes (Private or Public) created by KTRs will be visible by all parties]

TRAINEE NOTES

Printing an Issue

1. Navigate to and open an existing Issue
2. Click **Quick Print** button to open PDF version of the Issue in a new browser window
3. Either print or download the issue



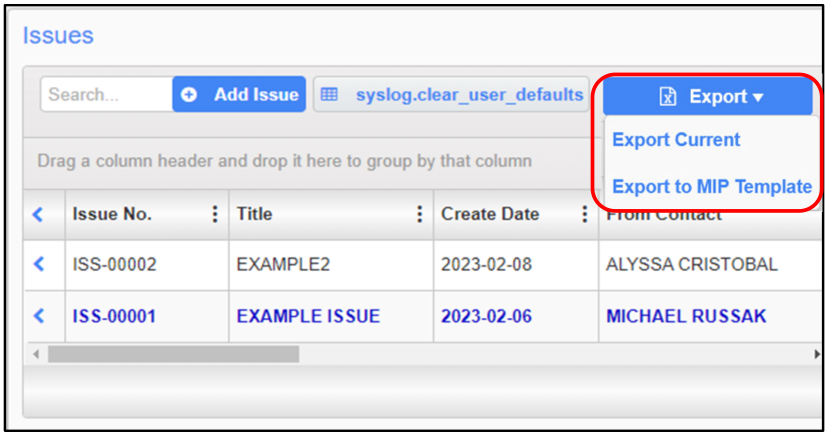


- Printing an Issue is very simple with the Quick Print button.
- When you print an Issue, it may take some time for the report to display on your screen. There are many things that are happening "behind the scenes" to generate the report:
  - The Issue data has to be "pulled" from eCMS.
  - The data then has to be inserted into the correct fields in a report template.
  - Your web browser has to launch Acrobat in a new browser window.
  - The report has to be displayed (called "rendering") in that new window.
- Ensure that the browser being used is not blocking pop-ups from eCMS.

TRAINEE NOTES

Exporting an Issue Log

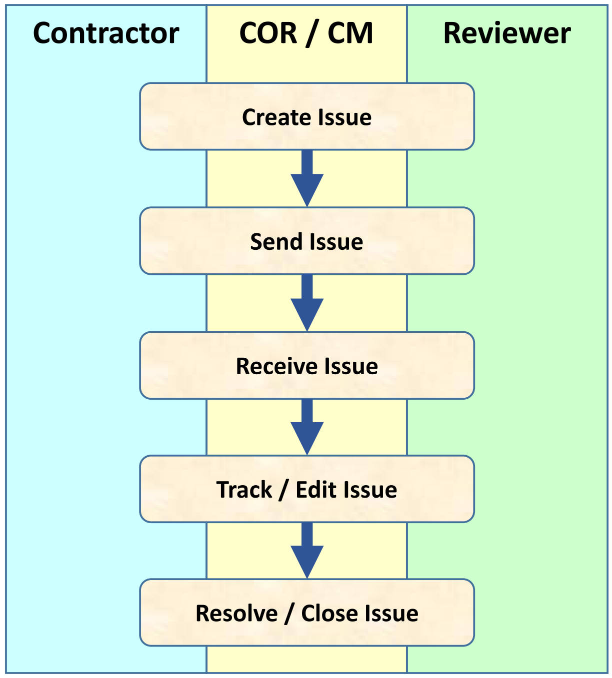
1. Navigate to an Issue Log with an existing Issue(s)
2. Click **Export** button to choose between the xlsx or csv to download
3. The file downloads automatically in the format of the selected option



- Exporting an Issue log is very simple.
- 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

Issues Workflow Recap



- The swim lane diagram presents a high-level representation of the Issues process in eCMS.
- The Issue/Internal Routing workflow is very simple and applies to just about every role.

TRAINEE NOTES

Summary

- Issues are powerful tools to address and provide resolution on any topic by all users
- The Issues workflow is one of the simplest in eCMS
- Issue records can be created by just about anyone and there are many ways you can create an Issue
- The Issue screen enables you to create new Issues, manage existing Issues, and respond to and close Issues
- You can view Action Items related to Issues through the User Action Items Dashboard
- Linking and relating enable you to establish links to other eCMS objects that are germane to the Issue
- For longer projects, Issues can be helpful when it comes time to evaluate Contractor performance using CPARS

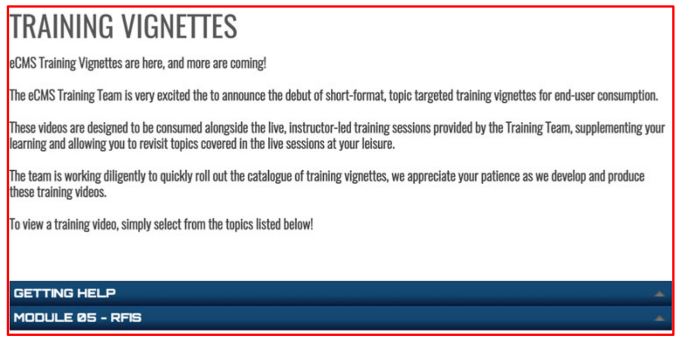
TRAINEE NOTES

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

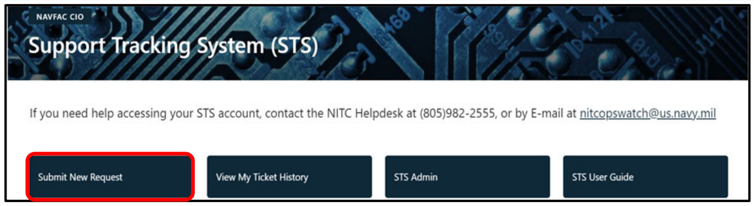
Requesting eCMS Help (All)

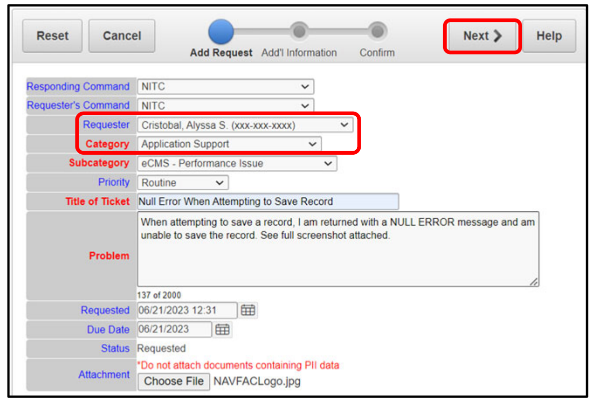
NAVFAC Users

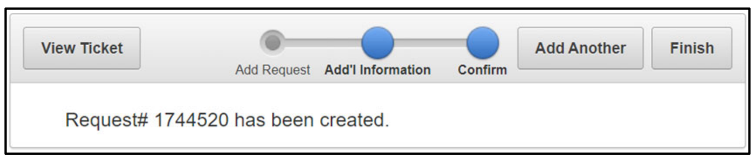
1. Navigate to the [eCMS SharePoint Online Page]
2. Submit New Request
3. Fill in required information:
   a) Category = Application Support
   b) Subcategory = eCMS – XX
4. Attach supporting information: ie Full Screenshot
5. Select **Next** to submit ticket

KTR Users

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

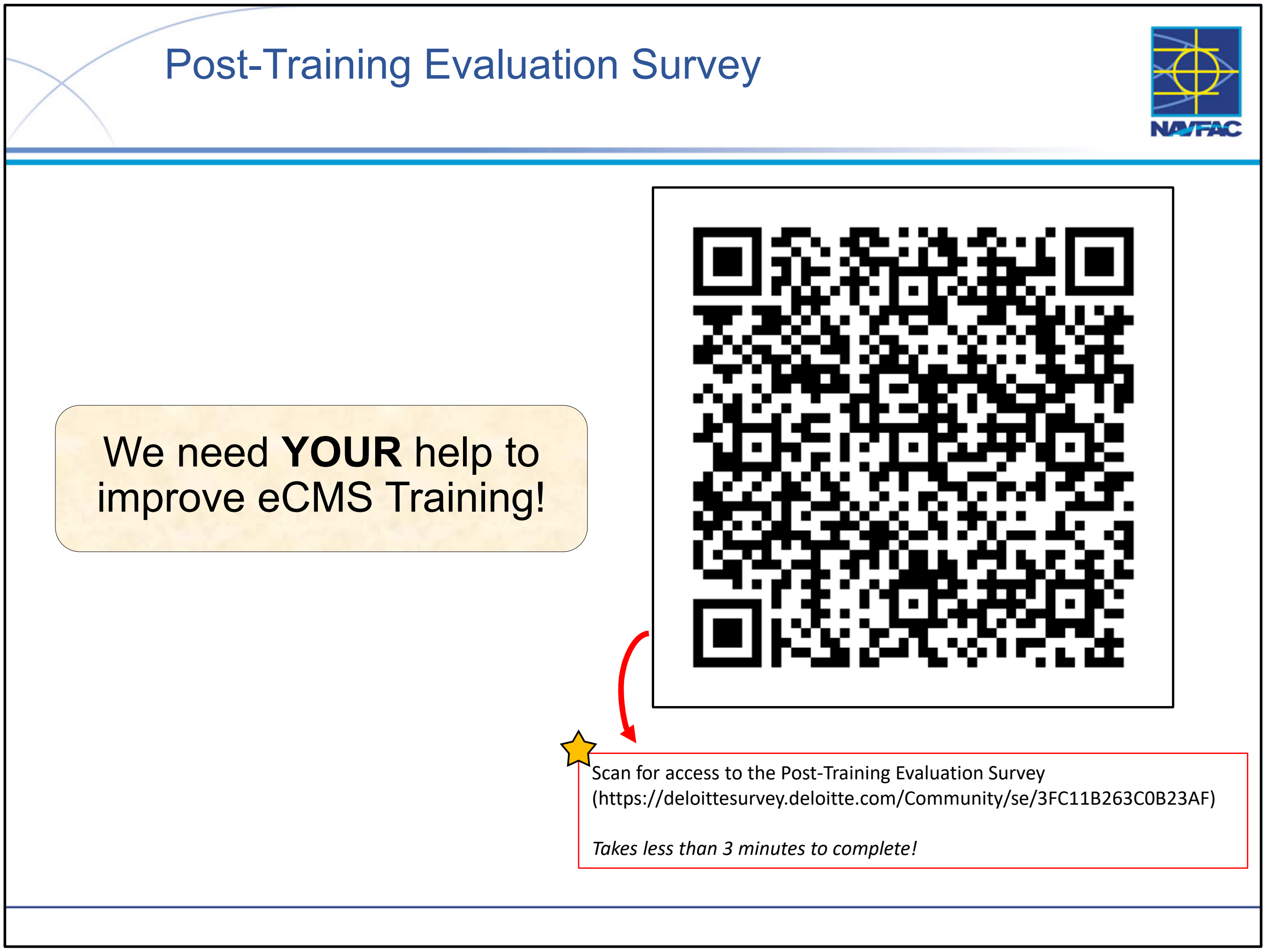






- There are several reasons that you may need to request support concerning eCMS – You may need a new user or project created in the system, be experiencing technical issues/errors preventing your usage of the system, or may not be able to access the system entirely.
- The primary medium for requesting 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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