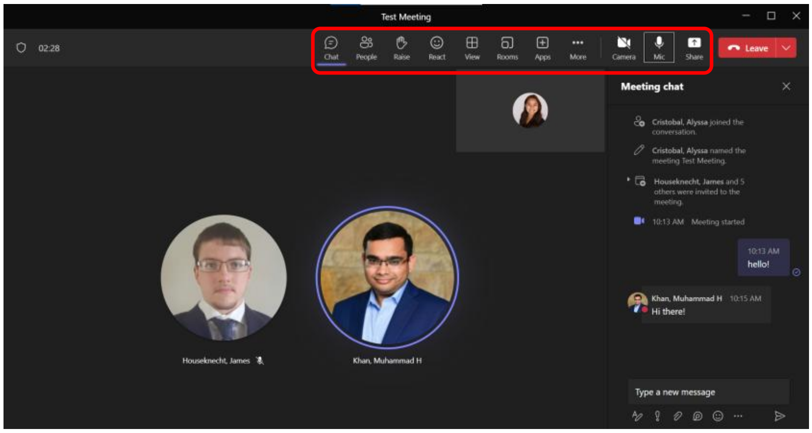
Teams Meeting Controls (All)

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

NAVFAC

Electronic Construction Management System (eCMS)

Module 05: Request for Information

This module includes the following topics:

- Introduction
- RFI Workflow
- Creating an RFI (KTR)
- Responding to an RFI Directly and Closing the RFI (COR)
- Assigning an RFI to Reviewers (COR)
- Building a Reviewer Table Using Reviewer Template (COR)
- Receiving and Responding to an RFI (REV)
- Closing and Reopening RFIs (COR)
- Relating an RFI to a Submittal
- Printing an RFI
- RFI 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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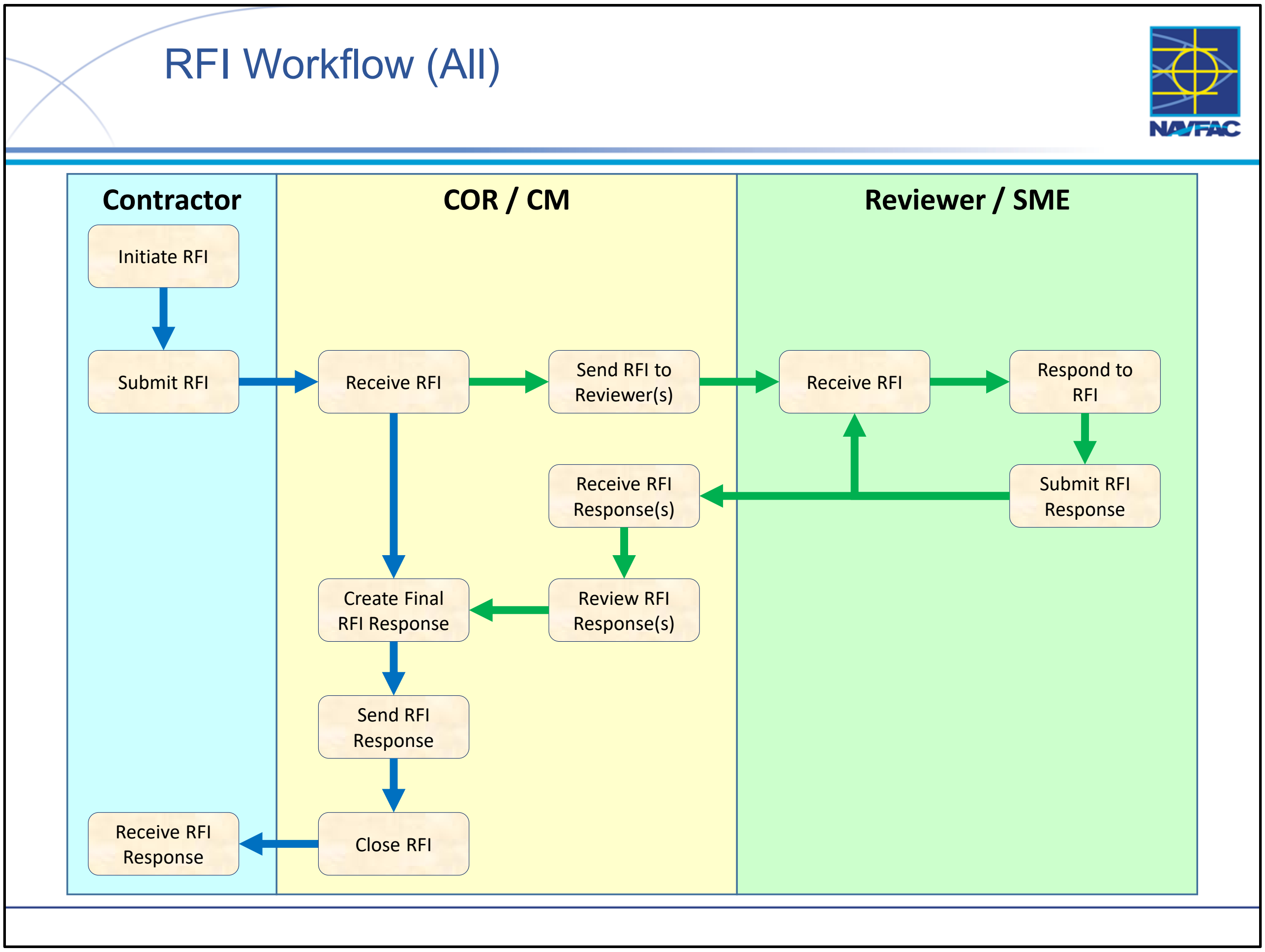
Introduction (All)

- One of the main interactions between KTR and NAVFAC
- RFIs resolve the Contractor's questions about the contract and provide clarity to the Contractor
- Important indicator of overall project health – Having many RFI could indicate:
  - Poor Contractor understanding of project requirements
  - Poor / incomplete design
  - Incomplete / incorrect specifications
  - Or it could mean nothing at all and everything is fine
- Tracked as a Project Delivery KPI per KiloGram 20-02
  - Total RFIs by Status (PO.6)
  - Average Response Time of Valid and Completed RFIs (PO.7)
  - Average Duration of Outstanding (Open) RFIs (PO.8)

- RFIs are one of the core interactions NAVFAC and the Contractor, along with Daily Reports and Submittals.
- The number of RFIs and the speed with which they are answered is a key indicator of overall project health. Having a large number of RFIs is not necessarily an indicator that the project is in danger, especially if the project is large and complex; but if the project is simple yet has many RFIs, then it could be an indicator of a deficient design or poor Contractor understanding of the design requirements. Similarly, if the time required to respond to RFIs is excessive (i.e., the "cycle time" is too large) it could indicate that the project is understaffed or that RFI answering processes are inefficient.
- KiloGram 20-02 includes three project delivery (Post-award) Key Performance Indicators (KPIs) that are pulled directly from eCMS.
- **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

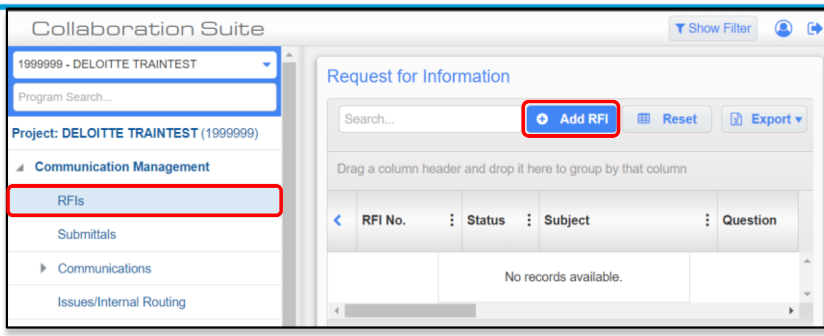


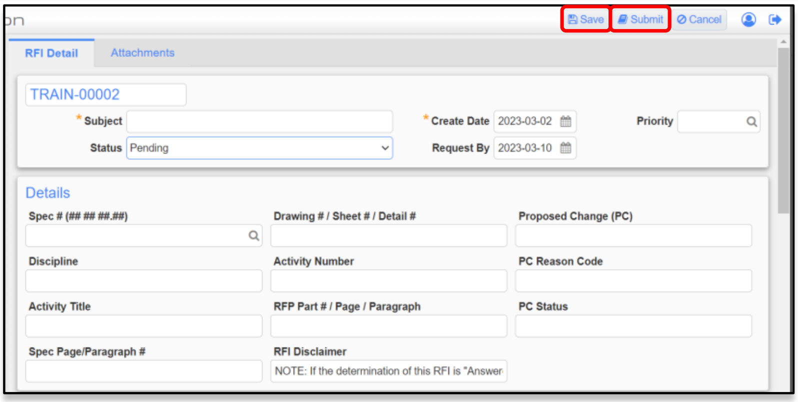
- The swim lane diagram presents a high-level representation of the RFI response process in eCMS.
- There are two general workflows:
  - The COR/CM is able to respond to the RFI directly, without any other support.
  - The COR/CM requires other support (SME) to respond to the RFI.

TRAINEE NOTES

Creating an RFI (KTR)

1. Navigate to RFI
2. Click **ADD RFI** button
3. Complete RFI Details Form
4. Click **SAVE** button
5. Add attachments if required
6. Click **SUBMIT** button



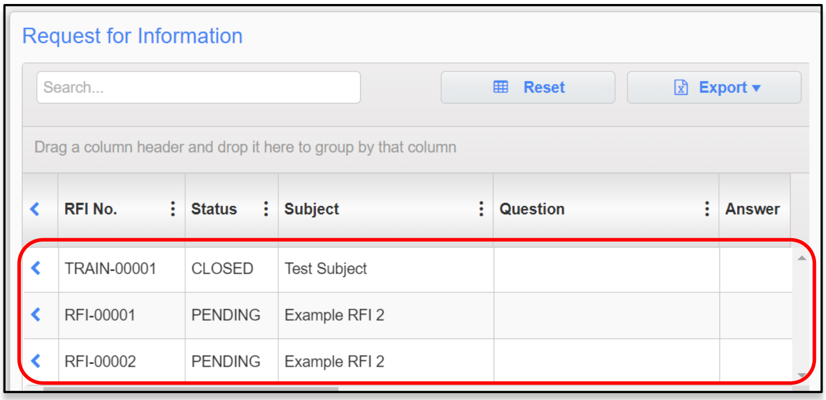


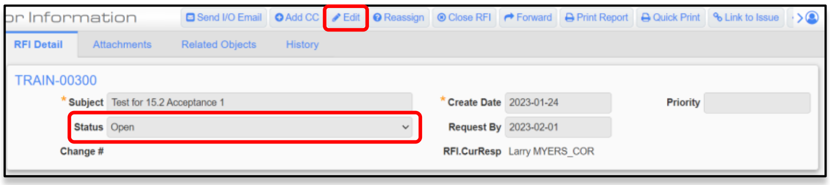
- Adding a new RFI is a very straightforward process. Required fields that must be populated before you can save or submit the RFI include:
  - RFI Number (auto-populated but editable; THIS VALUE MUST BE UNIQUE!)
  - Subject
  - Create Date (auto-populated but editable to reflect the actual submission date)
  - Receiver (who will receive the RFI – You should send the RFI to the COR/CM, and if need be, you can CC the DM)
- When submitting a RFI – always enter your recommended solution, and word the suggestion using language that you would like to see in the Government Response.
- Ensure you update the Cost / Schedule impact fields!
- Complete as many of the User Defined fields as possible – this will help NAVFAC process the RFI faster.
- RFIs that have been saved but not yet submitted have a status of PENDING in the RFI Log. You can continue to edit Pending RFIs as desired until it is submitted.
- Once an RFI has been submitted, you can no longer edit / delete it, but the COR and DM can VOID it.
- ***Good Practice***: Create the draft RFI and SAVE it. EDIT the RFI until you are sure it is correct, then update the Create Date just before you SUBMIT it. You **MUST SAVE** the RFI before you can add attachments. An attachment cannot be added to the RFI record until the record “exists” in eCMS; the record does not “exist” until you have saved it.
- ***Good Practice***: While the RFI number IS editable, good practice is to NOT edit it. Instead, you should utilize the default NUMBER but apply a NAMING convention for the RFI SUBJECT when you enter it. Example, “RFI-<RFI#>-<Version#>-<Location/Building/Floor/Area>-<Discipline/Trade>-<Subject>”
- You can add additional attachments / notes at any time after you have submitted the RFI.

TRAINEE NOTES

Responding to an RFI Directly and Closing the RFI (COR)

1. Navigate to and open the RFI
2. Click **EDIT** button
3. Change status to IN REVIEW
4. Review content / Attachments
5. Complete GOV Response
6. Update Schedule / Cost Impact (Y/N)
7. Click **SUBMIT** button
8. Click **CLOSE RFI** button



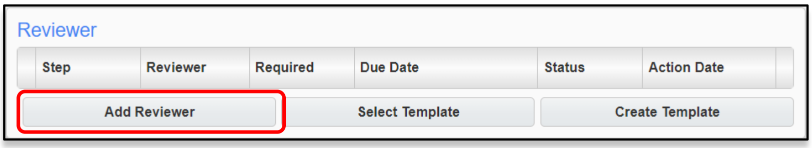


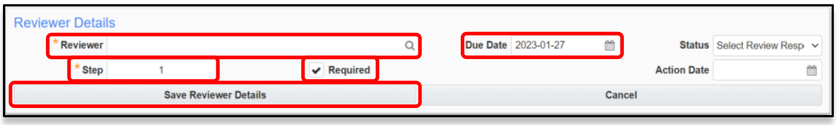
- When Reviewer/SME support is not required to respond to the RFI, the COR/CM can answer it directly.
- Navigate to RFI, then filter / sort / scroll to find the RFI you want to answer and click it to open the Details view.
- When you first open the RFI, all fields are “grayed out.” Click Edit to enable editing, then immediately change the status to In Review. Leave the status this way until you close the RFI.
- Review the RFI contents, paying particular attention to the Contractor’s question / suggested response, and any attachments (which may require annotation).
- 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).
- ENSURE you update the Potential Contract Change, Schedule Impact, and Cost Impact fields!
- Make sure to pay attention to the disclaimer.
- If the Contractor’s suggested answer is acceptable, or if it will require only minor modifications, click Copy Suggestion and accept the confirmation to copy it to the Answer field in its entirety. You can then edit the copied response if desired.
- When you are all done with your edits, click Submit to route the RFI back to the Contractor. When you click the Submit button, the fields will lock again.
- Finally, click the Close RFI button to close the RFI. When you click the Close button, the status field on the RFI Detail screen disappears, and the RFI status on the RFI Log changes to Closed.

TRAINEE NOTES

Assigning an RFI to Reviewers (COR)

1. Navigate to and open a RFI
2. Review RFI content and (if applicable) attachments
3. Click **Edit** button
4. Update RFI Status
5. In Reviewer section, click **Add Reviewer** button to open Reviewer Details
6. Search for and add reviewers





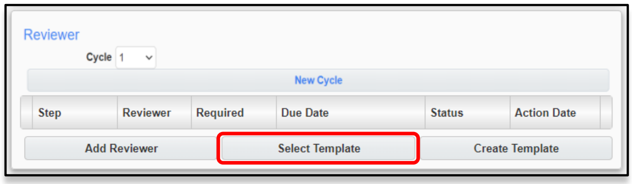
7. For each reviewer, confirm:
   - Step (sequential or parallel)
   - Due Date
   - Check Required
8. Click **Save Reviewer Details** button
9. Click **Submit** button

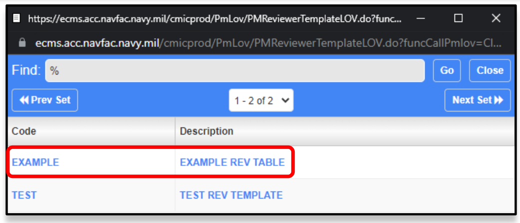
- Sending an RFI to one or more Reviewers is the second major RFI workflow. The initial steps are the same as when the COR responds to the RFI directly: Find and open the RFI, perform an initial review, and unlock the RFI for editing.
- The difference occurs in the Reviewer section – immediately below the Response section used earlier. This is where the COR can assign Reviewers by creating a Reviewer Table.
  - It is important to check the Required box for each Reviewer. If you don't, then the Reviewer will not be added to the workflow sequence (the reviewer is essentially a CC:).
  - The Step field determines the order in which the RFI will be routed to reviewers. Lowest number will be first, highest number will be last. To route an RFI to multiple reviewers in parallel, edit the Step field and assign all parallel reviewers with the same Step number.
  - It is best practice for the COR populating the Reviewer section to include themselves as the final Reviewer to look over the Reviewer responses and give a final response before sending the RFI back to the Contractor.
- **NOTE:** A user can also add a Distribution List as a Reviewer. Distribution Lists are unique when used in the Reviewer Table. The action will show up for each of the Reviewers in the list Distribution List. Once one person completes their review, the action will disappear from the others.

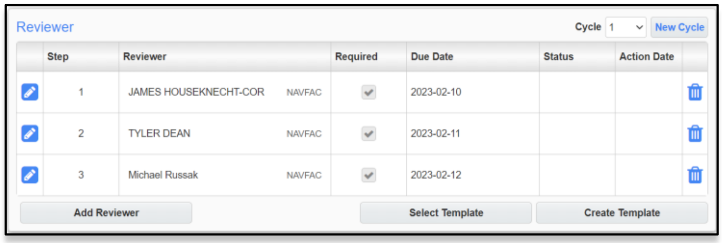
TRAINEE NOTES

Building a Reviewer Table Using Reviewer Template (COR)

1. Navigate to and open a RFI
2. Click **Edit** button
3. In Reviewer section, click **Select Template**
4. Select Reviewer Template by Name





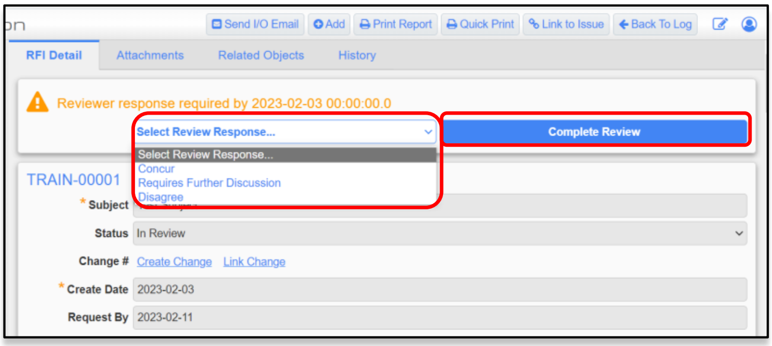


- When navigating RFIs throughout the lifecycle of your project, you may find yourself adding the same set of Reviewers, in the same order. While you can continue to add these reviewers one at a time, you also have the option to create a **Reviewer Template**.
- A **Reviewer Template** will store both the order and the personnel of the Reviewer Table at the time that it is created, making it a very powerful tool for auto populating this table with a consistent set of Reviewers.
- Utilizing a **Reviewer Template** is a very straightforward process, however, it requires the **Reviewer Template** to be created beforehand (see previous slide on Create a Reviewer Template).
- Creating a **Reviewer Template** is a very straightforward process. The RFI must be Saved to add Reviewers and Create a Reviewer template:
  - Add all relevant Reviewers in the order that you want to be utilized on future RFIs
  - Select **Create Template**
  - Add a **Code** and **Name**
  - Select **Save**
- Reviewer Templates can also be created from Reviewer Template Maintenance (covered in Module 13)

TRAINEE NOTES

Receiving and Responding to an RFI (REV)

1. Navigate to and open RFI
2. Review RFI content and (if applicable) attachments
3. Add any relevant notes in the **Notes** section (if applicable)
4. Choose response from **Select Review Response** dropdown menu
5. Select **Complete Review**

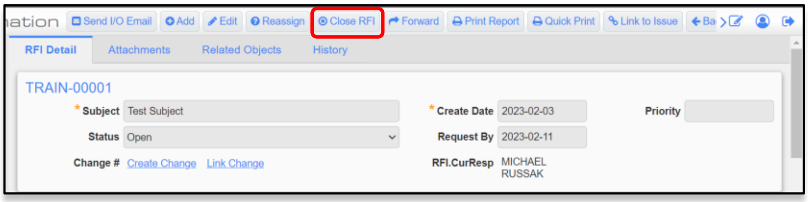


- When notified that a RFI is "in your court" for action (through a routine eCMS notification, through an explicit I/O eMail, or through a review of your Action Items Dashboard), you can open and complete your review of the RFI.
- Locate and open the RFI – Note the banner at the top of the RFI Details screen.
- THOROUGHLY review the RFI, paying particular attention to any attachments (which you can open and annotate if desired). NOTE that any annotations you make to attachments will be visible to all users!
  - 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).
- 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.
- If you add a new attachment as a Reviewer, then you should also add a Note. When you save the Note, you can explicitly link your note to the Attachment that you just added.
- When you have completed your review, select a Review Response at the top of the screen: Concur, Requires Further Discussion, Disagree. Based on these 3 responses when the RFI gets back to the COR the COR may decide how to proceed. Once you have selected your response, ensure you click the Complete Review button

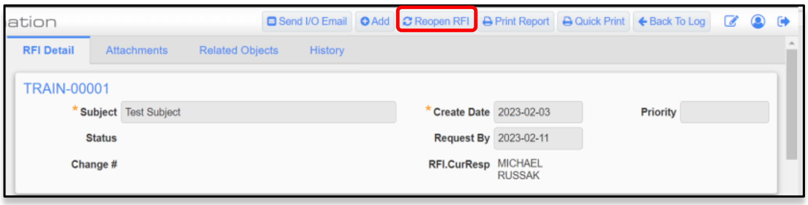
TRAINEE NOTES

Closing and Reopening RFIs (COR)

1. Navigate to and open RFI
2. Click **Close RFI** button



1. Navigate to and open RFI
2. Click **Reopen RFI** button

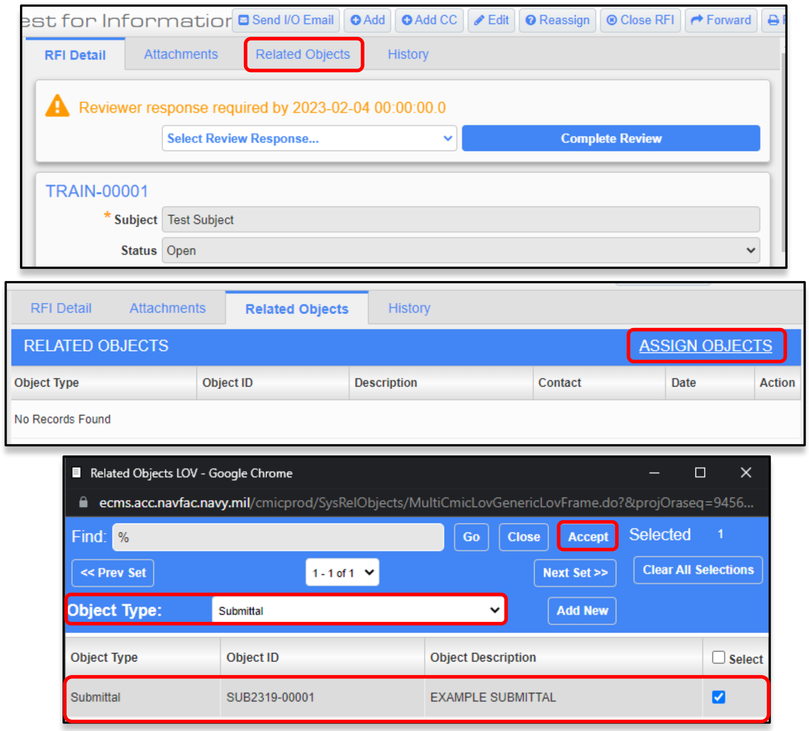


- When the RFI is complete, the COR closes it.
  - Locate and open the RFI you want to CLOSE.
  - Click Close RFI.
  - When you do this, the GOV Disposition field disappears and the status for both the Government and Contractor changes to CLOSED in the RFI log.
- Reopening a RFI that has been closed is just as simple:
  - Locate and open the RFI you want to REOPEN.
  - Click Reopen RFI.
  - When you do this, the GOV Disposition field reappears and the status for both the Government and Contractor changes to OPEN in the RFI log.

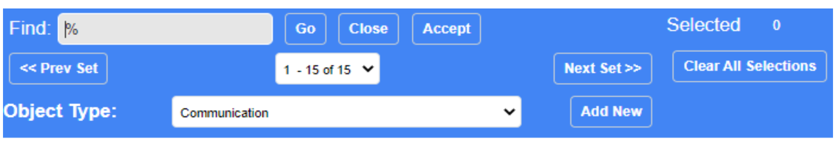
TRAINEE NOTES

Relating an RFI to a Submittal (All)

1. Navigate to an open RFI
2. Click Related Objects tab
3. Click **ASSIGN OBJECTS**
4. Select Object Type **Submittal**
5. Locate the desired submittal and click the checkbox to select it
6. 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.
- While the slide addresses the specific case of relating a RFI to a Submittal, the RFI could be related to many other object types as well. Relating a RFI to a Submittal is the most common case of the relating functionality.
- 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.

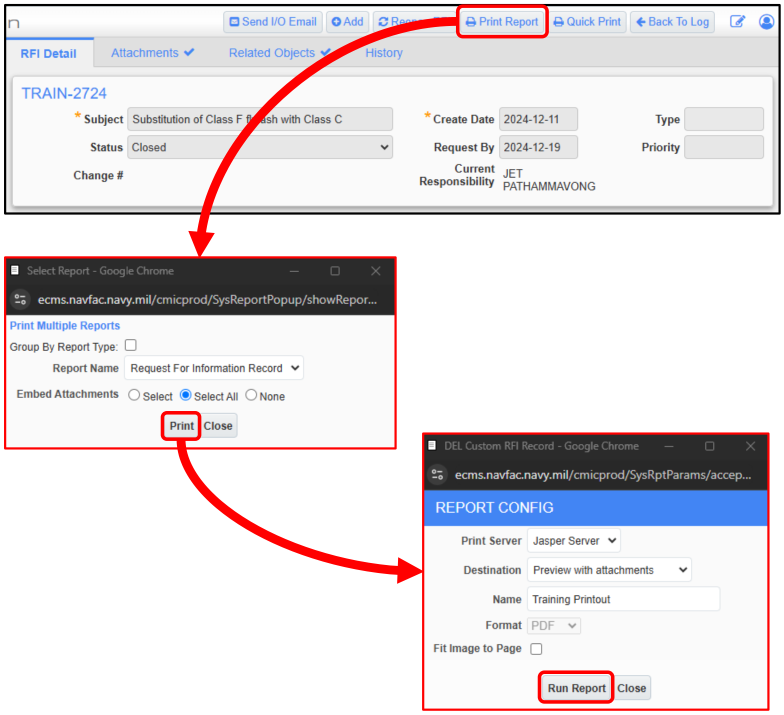


- First, you need to choose the type of object you want to relate to the RFI (a Submittal) (Object Type dropdown).
- Then, you need to find the specific object you want to relate, either by browsing through the list or by searching.
- Finally, after choosing the desired Submittal, you need to click a button (Accept) that is not located intuitively.
- Note that if necessary, you can relate a RFI to several Submittals at once.
- **LESSON LEARNED**: You can create a new object that you can relate the RFI 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

Printing an RFI (All)

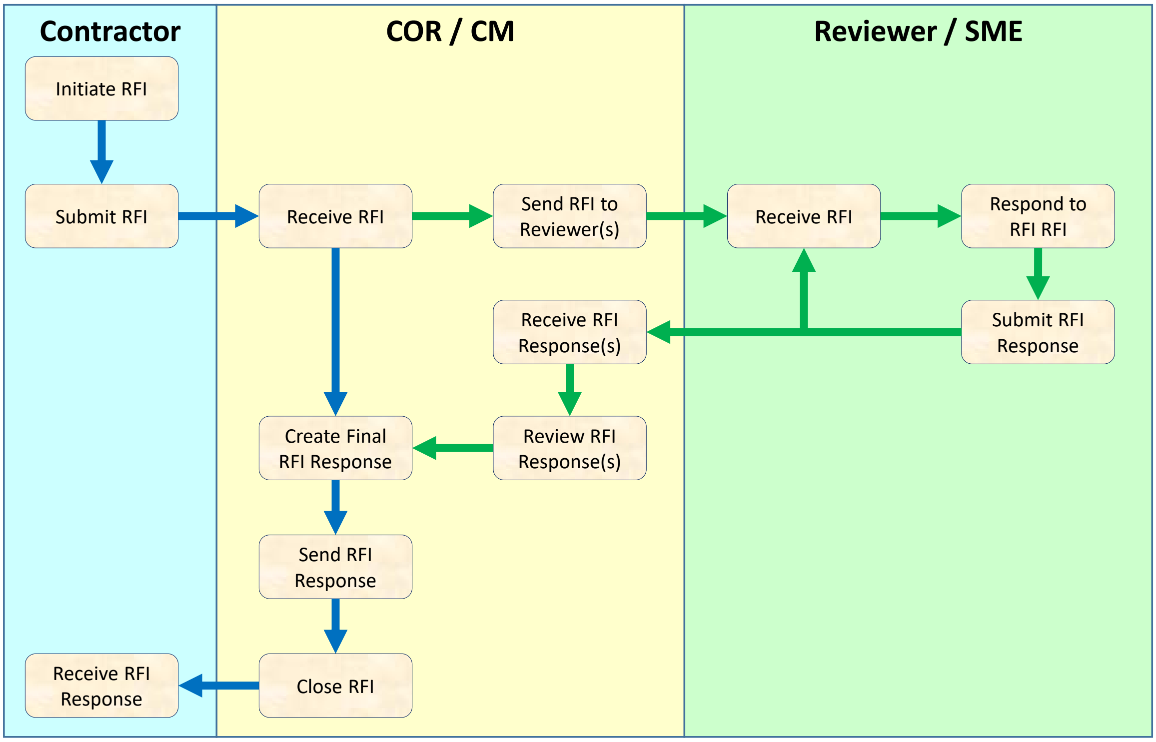
1. Navigate to and open RFI record
2. Click **Print Report** button to launch the Select Report screen
3. Complete report details and select **Print** to launch the Report Config screen
4. Select **Run Report**



- Printing an RFI is a very straightforward process:
  - Navigate to and open the RFI record you wish to print.
  - Select **Print Report** which will launch the Select Report window.
  - Use the default Report Name and select the desired value for Embed Attachments. Selecting **Select** or **Select All** will append the selected attachments (or all of them) to the printout.
    - **NOTE:** Only attachments which are visible to you based on your role can be selected for printing.
    - **NOTE:** Only attachments of .pdf, .jpg, and .png format have been included with this report if selected for embedding. Attachments of other formats must be individually opened and downloaded/printed using a separate compatible app.
  - Select **Print.**
  - On the Report Config window, utilize the default values for Print Server and Destination. For printouts with attachments, a Name for the resulting file can be provided. Select **Run Report**.
    - This will launch a new browser window with a preview of your report in PDF format. From this preview you can Save or Print this PDF as you would normally from within your browser.
- The resulting printout will have values matching that of the selected RFI record. Some pertinent information to remember when reviewing your printout include:
  - The Status of the RFI can be reviewed in the top right corner of the printout. RFIs which are OPEN will not have Responder Information in the printout, while those which are CLOSED will.
  - Sender and Responder Information have a provided “signature” block. This is not an official electronic signature and can be considered a denotation of the user account performing the action in the system.
  - **NOTE:** Public Notes are provided in the printout. Private Notes will not be displayed.
    - Replies take on the Public/Private attribute of their parent and are indented on the page.

TRAINEE NOTES

RFI Workflow Recap



- The swim lane diagram presents a high-level representation of the RFI response process in eCMS.
- There are two general workflows:
  - The COR/CM is able to respond to the RFI directly, without any other support.
  - The COR/CM requires other support (SME) to respond to the RFI.

TRAINEE NOTES

Summary

- A RFI is one of many OBJECTS in eCMS
- One of the main interactions between KTR and NAVFAC
- RFIs resolve the Contractor’s questions about the contract and provide clarity to the Contractor
- Ensure you update the Cost / Schedule impact fields!
- More information in the Details fields is better – speeds up processing
- The RFI object is initially created by the Contractor
- When the COR receives the RFI, there are two possible workflows:
  - Direct response by the COR
  - Additional review by SME(s)
- COR can choose which Reviewer comments to incorporate
- COR sends RFI back to Contractor and closes it
- RFIs are a key indicator of overall project health and are tracked per KiloGram 20-02

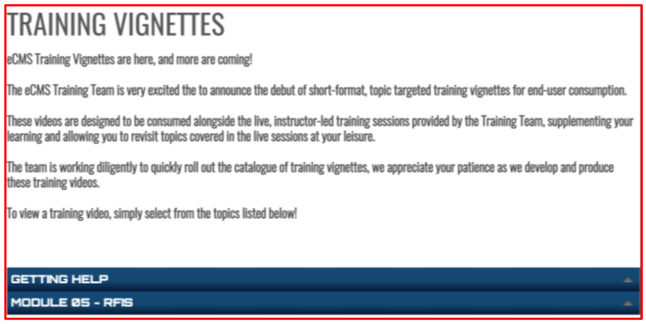
TRAINEE NOTES

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

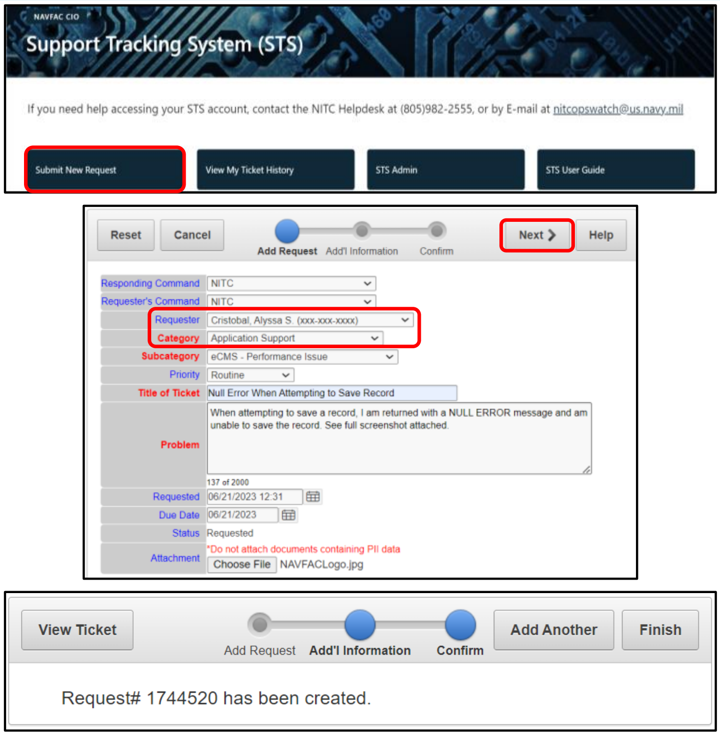
Requesting eCMS Help (All)

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

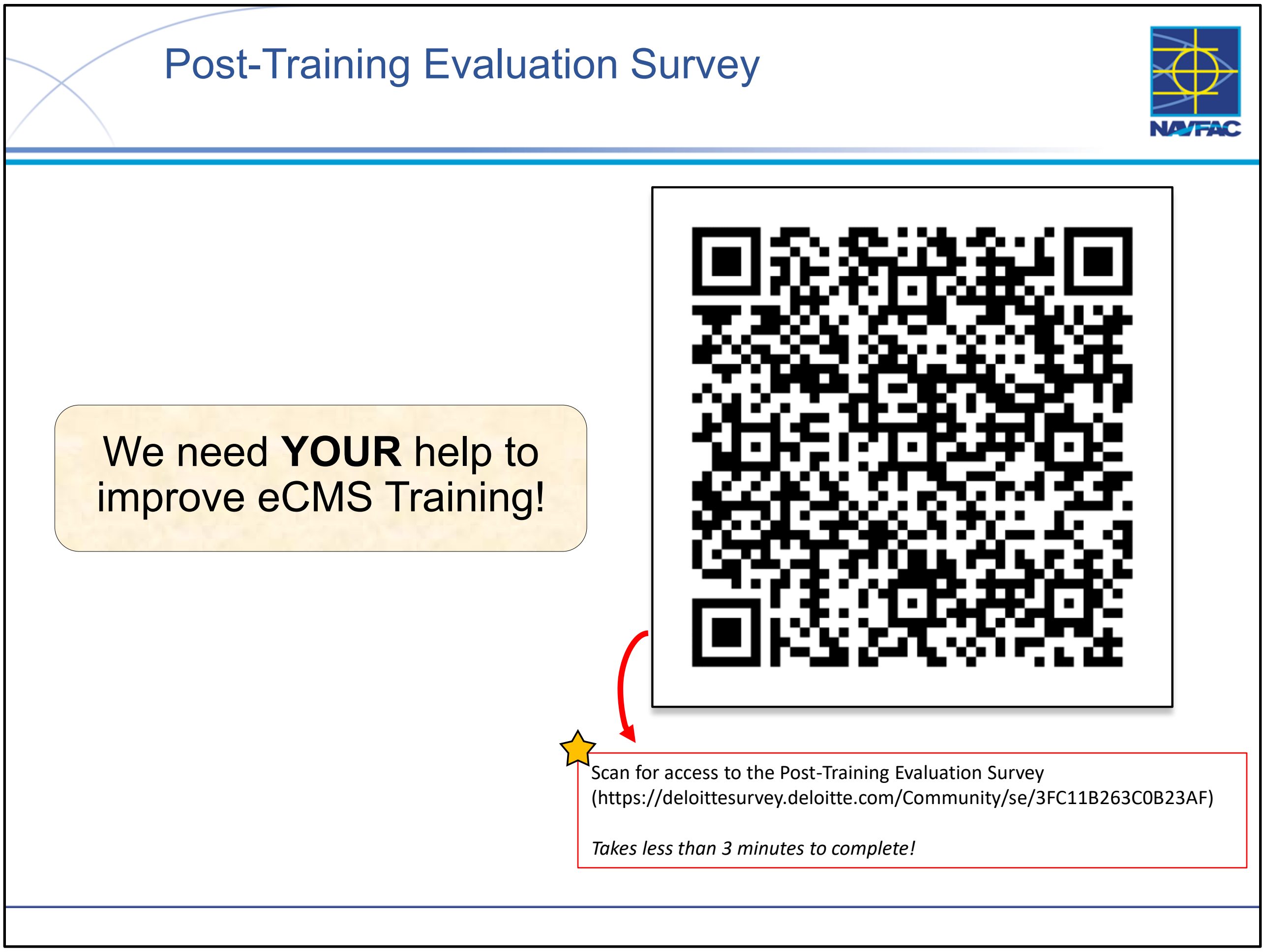
KTR Users

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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