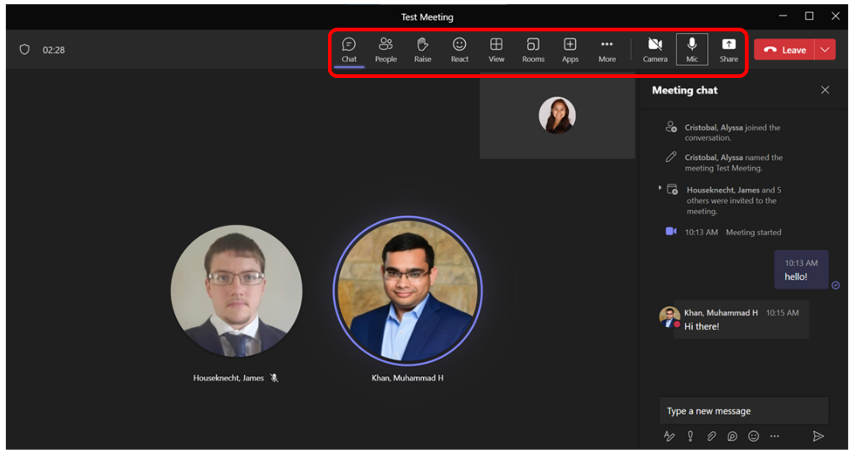
Teams Meeting Controls (All)

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

Module 2: Dashboards

Module 3: Communications

Module 4: Issues

Module 5: Request for Information (RFI)

Module 6: Submittals

Module 7: Daily Reports

Module 8: Meetings

Module 9: Non-Compliance Notices

Module 10: PSPDF Viewer

Module 11: Checklists

Module 12: Distribution Lists

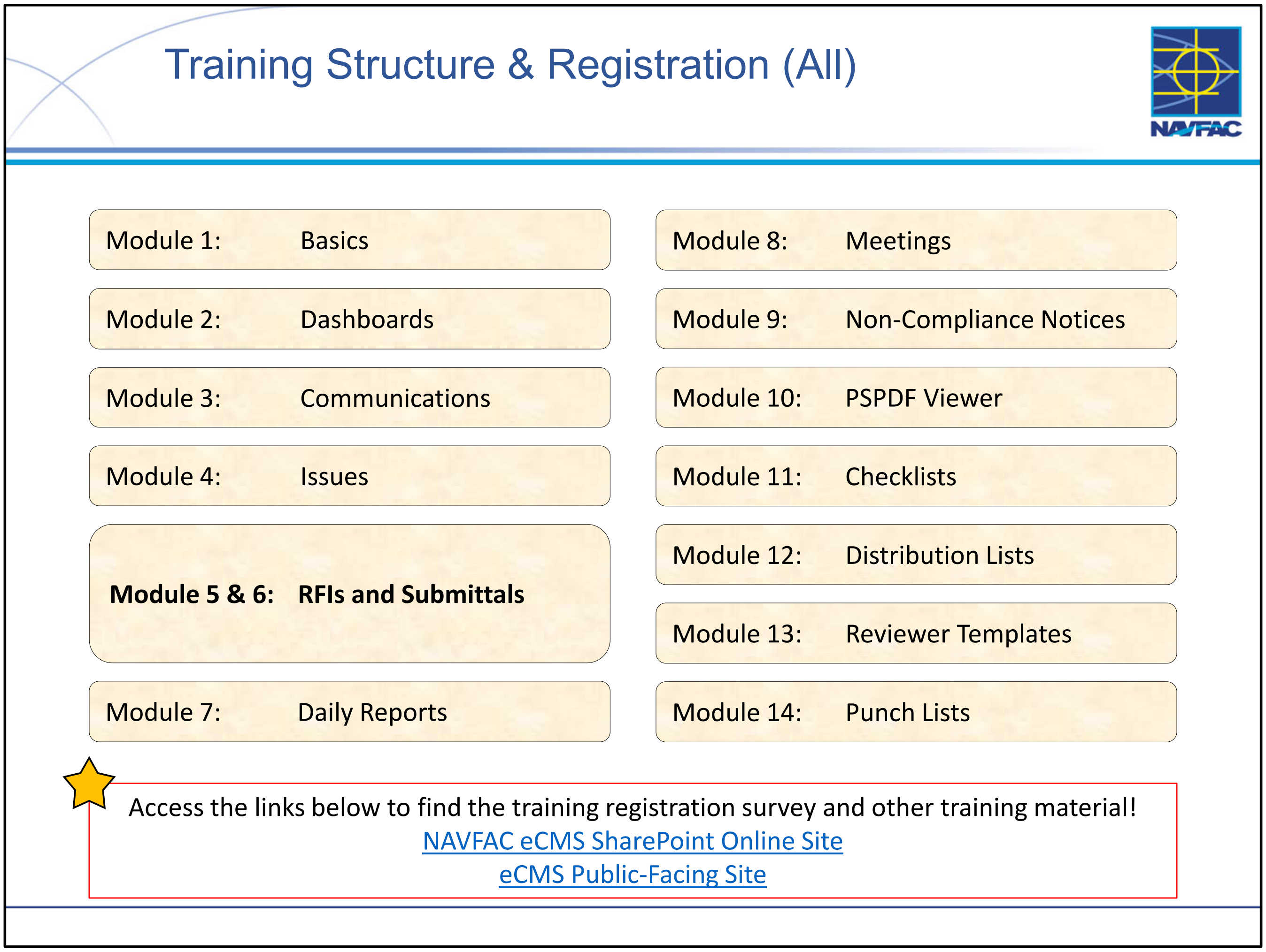
Module 13: Reviewer Templates

Module 14: Punch Lists

Module 06: Submittals

This module includes the following topics:

- Introduction
- Submittal Workflow
- Creating a Submittal (KTR)
- Responding to a Submittal Directly (COR)
- Assigning a Submittal to Reviewers (COR)
- Building a Reviewer Table Using Reviewer Template (COR)
- Receiving and Responding to a Submittal (REV)
- Receiving and Responding to a Submittal (COR)
- Closing a Submittal (COR)
- Submittal Workflow Recap
- Summary



- 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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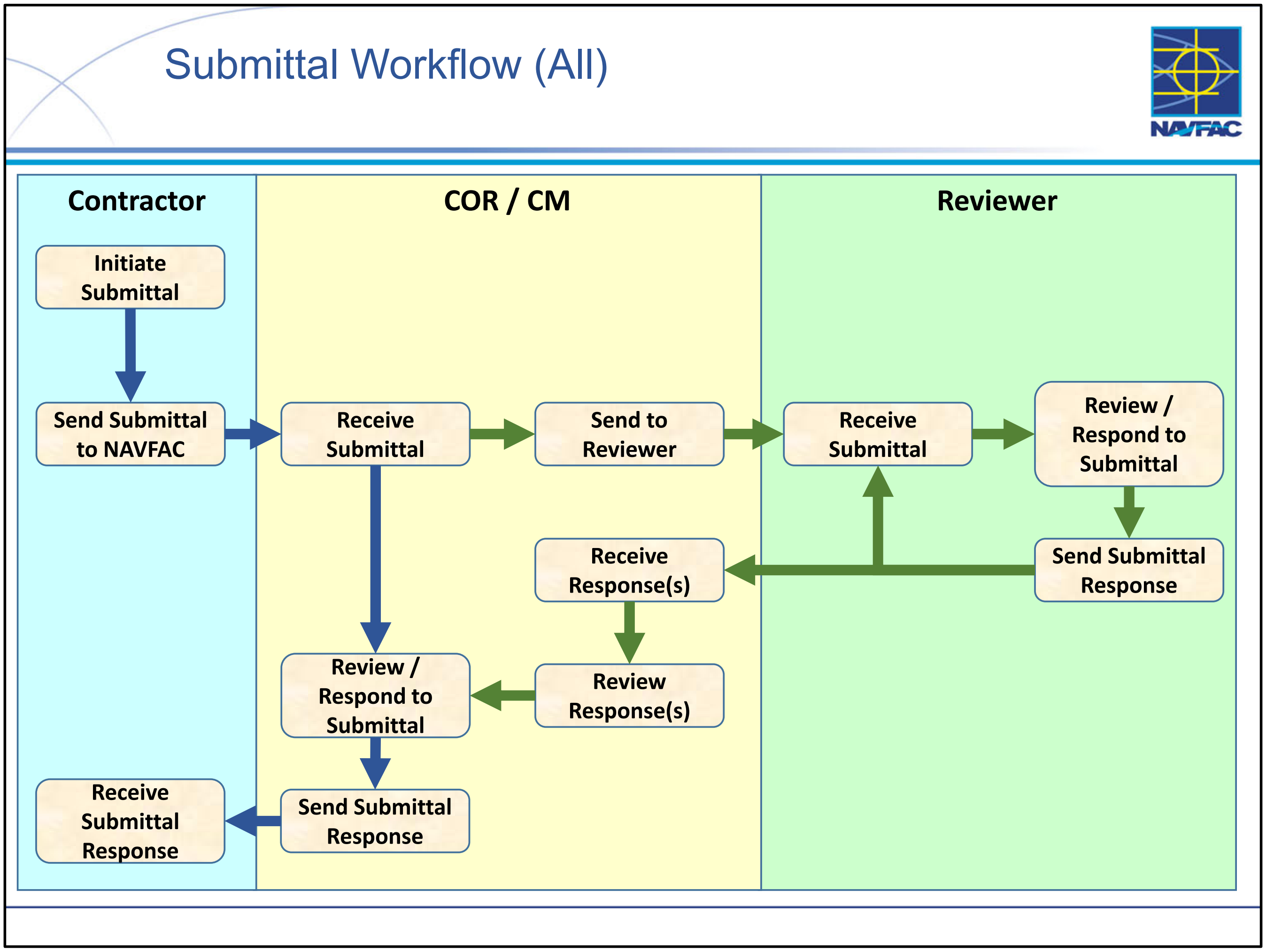
Introduction (All)

- One of the core interactions between KTR and NAVFAC
- Every project has MANY submittals
- Some submittals require approval/acceptance before construction activities
- Tracked as a Project Delivery KPI per KiloGram 20-02
  - Pre Construction submittals defined 01 33 00 are approved within 60 days after award (PO.3)

- Submittals are one of the core interactions between the COR and the Contractor, along with Daily Reports and RFIs.
- The number of Submittals, and the speed with which they are answered, is a key indicator of overall project health. The number of submittals is predefined by the project specifications, and the Contractor will submit them over the entire life of the project. But some Submittals are required to be delivered and approved early during the project life-cycle. These are typically required within 60 days after contract award.
- For vendors and subcontractors, the Submittal screen displays all submittals that are applicable to their company. For general contractors, this log displays all submittals.
- KiloGram 20-02 includes one project delivery (Post-award) Key Performance Indicator (KPI) that is pulled directly from eCMS.
- Per the UFGS 01 31 23.13 20 eCMS Division 01 General Requirements spec, “All submittals and associated attachments must be transmitted to the Government via the COR. Transmittals are no longer required when using eCMS since approval status is tracked on the submittal. Transmittal forms can be attached to submittals if approved by the COR. Submittals requiring government approval are "Transmitted For" "Approval". Submittals requiring contractor approved submittals, including those designated for Contractor Quality Control approval or Information Only, are "*Transmitted For" "Information Only" in the Submittal Module.” Please refer to the spec for more information on general requirements of 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

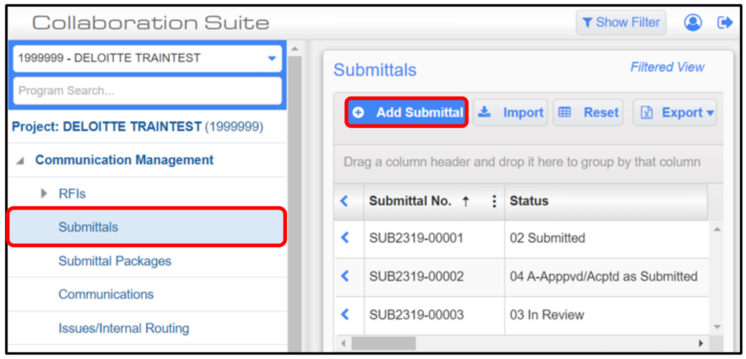


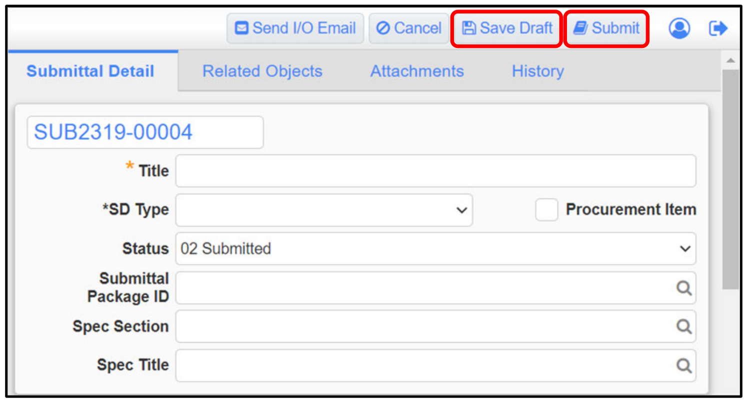
- The swim lane diagram presents a high-level representation of the Submittal response process in eCMS.
- There are two general workflows:
  - The COR is able to respond to the Submittal directly, without any other support.
  - The COR requires other support (SME) to respond to the Submittal.
- Pay attention to the flow of the Submittal data record between swim lanes. There is no physical transfer of the information, rather when the Contractor submits the Submittal, it immediately becomes visible to the COR. When the COR adds reviewers, the information immediately becomes visible to them. The Submittal Reviewer Workflow automatically and immediately passes the Submittal information from one Reviewer to the next as reviews are completed.

TRAINEE NOTES

Creating a Submittal (KTR)

1. Navigate to Submittal
2. Click **Add Submittal** button
3. Complete Submittal Details Form
4. Click **Save Draft** button
5. Add attachments if required
6. Click **Submit** button



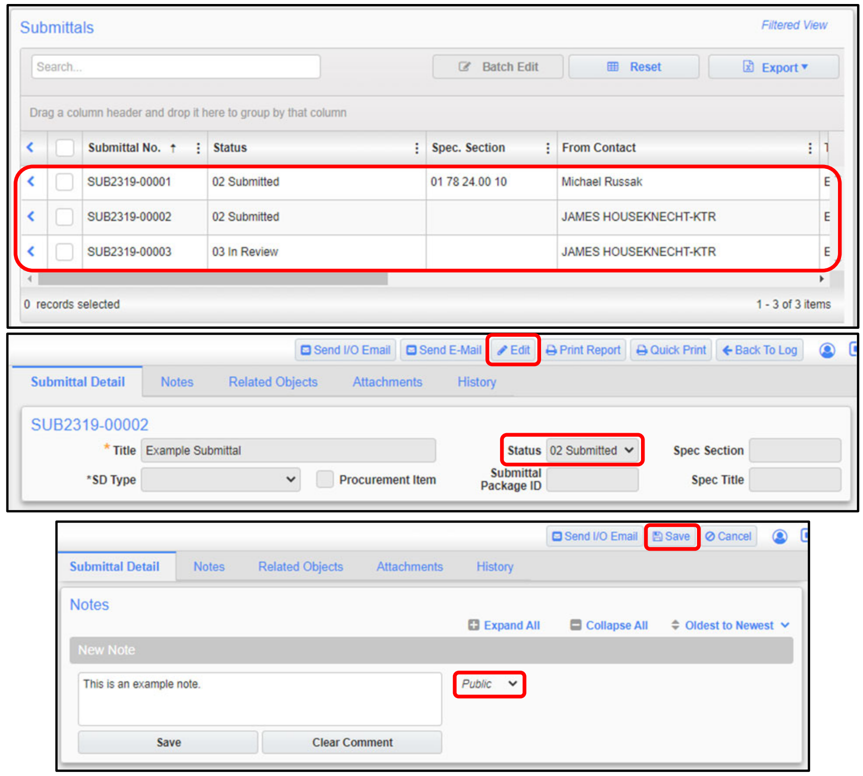


- Adding a new Submittal is a very straightforward process. Required fields that must be populated before you can save or submit the Submittal include: Submittal Number (auto-populated but editable; THIS VALUE MUST BE UNIQUE!), Title, Submittal Variation, Critical Path, Requested By Date
- Complete as many of the User Defined fields as possible, this will help NAVFAC process the Submittal.
- Receiver (who will receive the Submittal – You should send the Submittal to the COR/CM, and if need be, you can CC the DM)
- Submittals that have been saved but not yet submitted have a status of PENDING in the Submittal Log and are not visible to the COR/CM until they are submitted. You can continue to edit Pending Submittal as desired until it is submitted. Once a Submittal has been submitted, you can no longer edit/delete it but the COR and the DM can VOID it.
- ***Good Practice***: Create the draft Submittal and SAVE it. EDIT the Submittal until you are sure it is correct, then you can SUBMIT. You **MUST SAVE** the Submittal before you can add attachments. An attachment cannot be added to the Submittal record until the record "exists" in eCMS; the record does not "exist" until you have saved it.
- ***Good Practice***: While the Submittal number IS editable, good practice is to NOT edit it. Instead, you should utilize the default NUMBER but apply a NAMING convention for the Submittal SUBJECT when you enter it. Example, "SUB<Submittal#>-<Version#>-<Location/Building/Floor/Area>-<Discipline/Trade>-<Subject>"
- In the case of a re-submittal, a contractor should submit a new Submittal Record using the same Record Identifier as the original record with a letter appended to it. (i.e., If the original record is 100, the new record would be 100A)
- You can add additional attachments / notes at any time after you have submitted the Submittal.

TRAINEE NOTES

Responding to a Submittal Directly (COR)

1. Navigate to and open a Submittal
2. Click **Edit** button
3. Review content / Attachments
4. Add a public or private note if desired
5. Update **Status** from picklist
6. Click **Save** button in the header to save Submittal edits

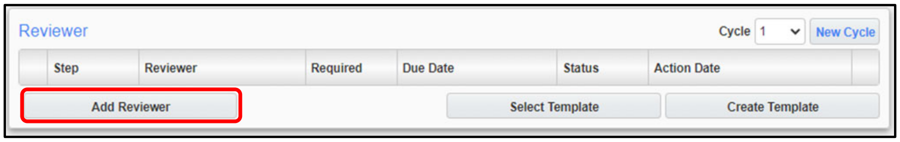


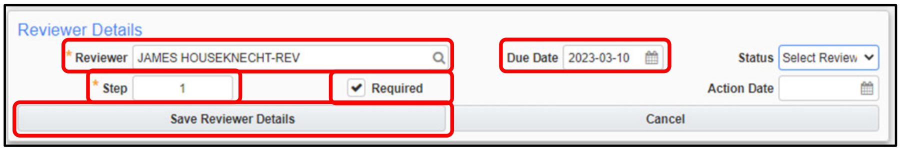
- When Reviewer/SME support is not required to respond to the Submittal, the COR can answer it directly.
- Locate and open the Submittal, then review all of the Submittal contents, including any Notes that may have been added.
- Note that when you first open the Submittal, all the fields are "grayed out." Click **Edit** to enable editing, then make any desired modifications.
- Enter any final COR remarks as a Note. Remember that private Notes are not visible to the Contractor but Public Notes are visible to the Contractor.
- Ensure you update the Status field at the top of the screen, then click **Save** to route the Submittal back to the Contractor.

TRAINEE NOTES

Assigning Submittal to Reviewers (COR)

1. Navigate to and open a Submittal
2. Review Submittal content and (if applicable) attachments
3. Click **Edit** button
4. In Reviewer section, click **Add Reviewer** button to open Reviewer Details (or click **Select Template** to choose an existing Reviewer Template)
5. Search for and add reviewers





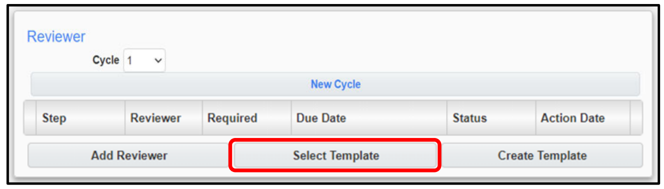
6. For each reviewer, confirm:
   - Step (sequential or parallel)
   - Due Date
   - Check Required
7. Click **Save Reviewer Details** button
8. Click **Save** button

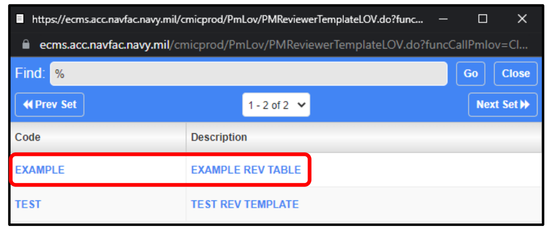
- Sending a Submittal to one or more Reviewers is the second major Submittal workflow. The initial steps are the same as when the COR responds to the Submittal directly: Find and open the Submittal, perform an initial review, and unlock the Submittal for editing.
- The difference occurs in the Reviewer section – immediately below the Response section. This is where the COR can assign Reviewers.
  - 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 order Reviewers do their reviews is dictated by the **Step** column, which goes in sequential order. If two or more Reviewers have the same **Step** value, they can do their reviews in parallel.
  - Use of Reviewer Templates can streamline adding sets of Reviewers that are used frequently. Clicking Select Template and then selecting the template you wish to use from the list will populate the Reviewers for the Submittal with that template. You can then add and edit Reviewers after that as well.
  - 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 Submittal back to the Contractor. It is also best practice to set the Status of the Submittal to IN REVIEW.
- **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.
- **BEST PRACTICE:** The Status of the Submittal should be set to IN REVIEW while Reviewers are reviewing and making Notes and responses.

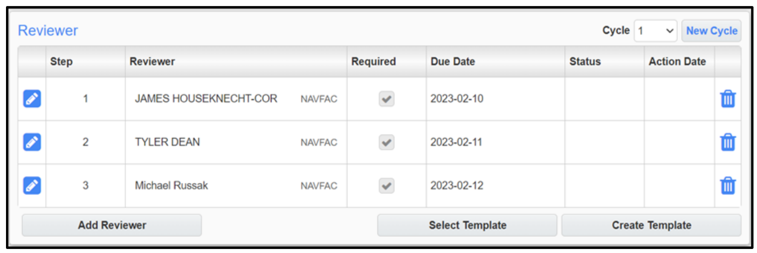
TRAINEE NOTES

Building a Reviewer Table Using Reviewer Template (COR)

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





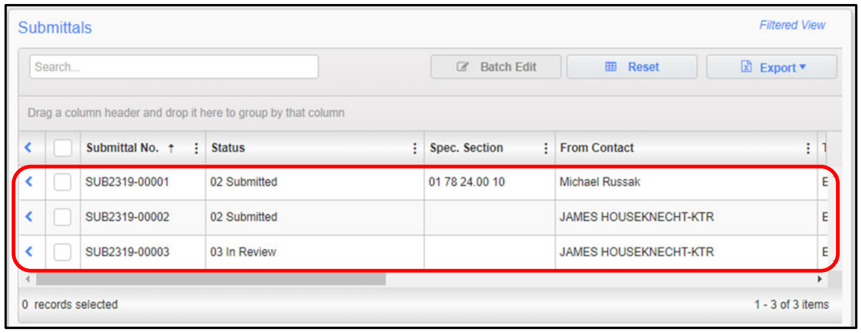


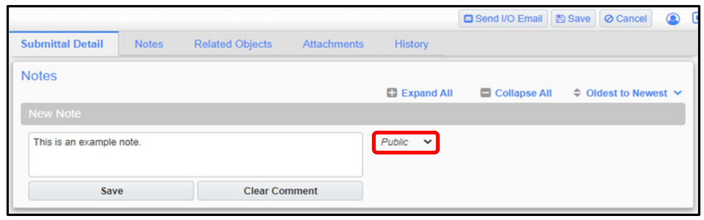
- As detailed in the slide, adding a Reviewer Table is a straightforward process.
- When navigating Submittals throughout the lifecycle of your project, you may find yourself adding the same set of Reviewers, in the same order. While you can continue to add these reviewers one at a time, you also have 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).
- Building a **Reviewer Table** is a very straightforward process. The Submittal must be Saved to add Reviewers and Build a Reviewer table:
  - Click **Edit**
  - Select **Select Template**
  - Select Reviewer Template by name
  - Select **Save**
- Reviewer Templates can also be created from Reviewer Template Maintenance (covered in Module 13)

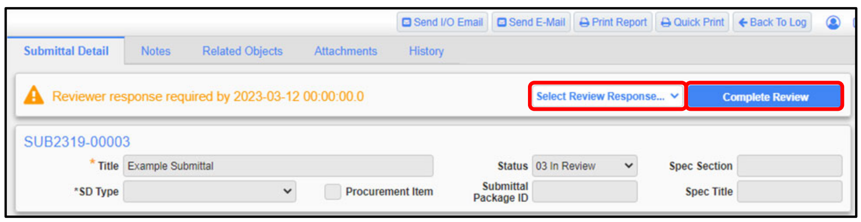
TRAINEE NOTES

Receiving and Responding to a Submittal (REV)

1. Navigate to and open a Submittal
2. Review content / Attachments
3. Add a public or private note if desired
4. Select a response from the **Select Review Response** picklist
5. Click **Complete Review** to send the submittal to the next Reviewer in the table





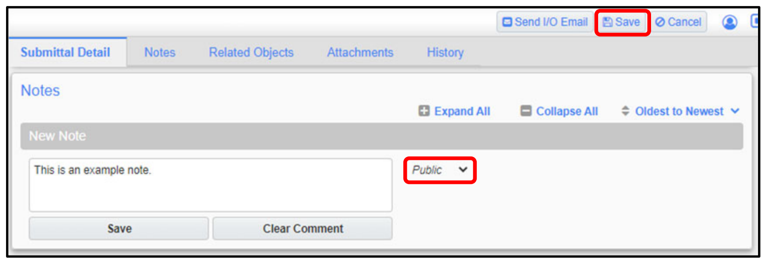


- When a COR populates a Reviewer Table for a Submittal, Reviewers will have to review the contents in the order specified by the table unless some Reviewers are ordered in parallel.
- Reviewers should review the contents of the submittal, provide Notes where necessary, and select a review response to complete their review. The next Reviewer in the table will then be able to take action.
- THOROUGHLY review the Submittal, 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).

TRAINEE NOTES

Receiving and Responding to Submittal (COR)

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

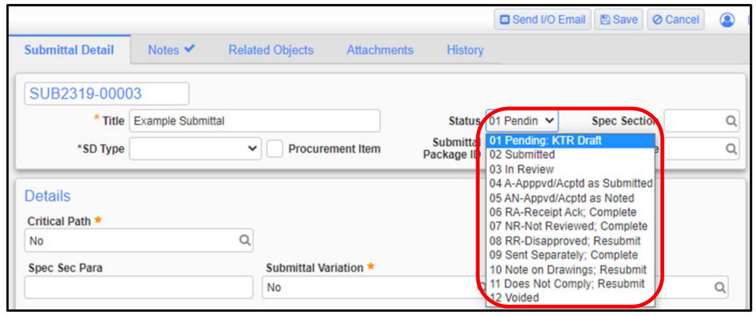


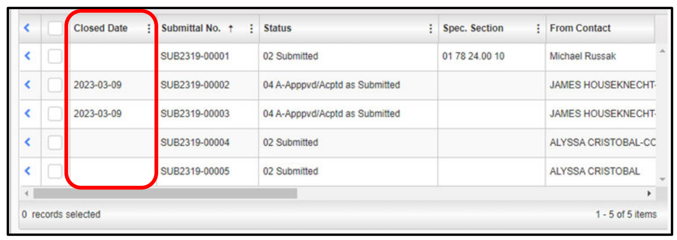
- When notified that a Submittal is back "in your court" for action when you added yourself as the COR as the final reviewer (through a routine eCMS notification, through an explicit I/O eMail, or through a review of your Action Items Dashboard), you can open and complete your final review of the Submittal.
- Locate and open the Submittal – Note the banner at the top of the Submittal Details screen.
- THOROUGHLY review the Submittal, 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 (note that these review options are different than what other reviewers see because you are a COR acting as a reviewer). Based on these responses, when the Submittal comes back to you again (now acting as the COR instead of acting as a Reviewer) you can decide how to proceed. Once you have selected your response, ensure you click the Complete Review button.
- **BEST PRACTICE:** Submittals set up properly should go back to the COR upon the last reviewer completing their review. The COR will then complete the review.

TRAINEE NOTES

Closing a Submittal (COR)

1. Navigate to and open a Submittal
2. Click **Edit** button
3. Select a relevant **Status**
4. Add final remarks in **Notes section**
5. Click **Save** button
6. A **Closed Date** will appear next to the submittal in the log

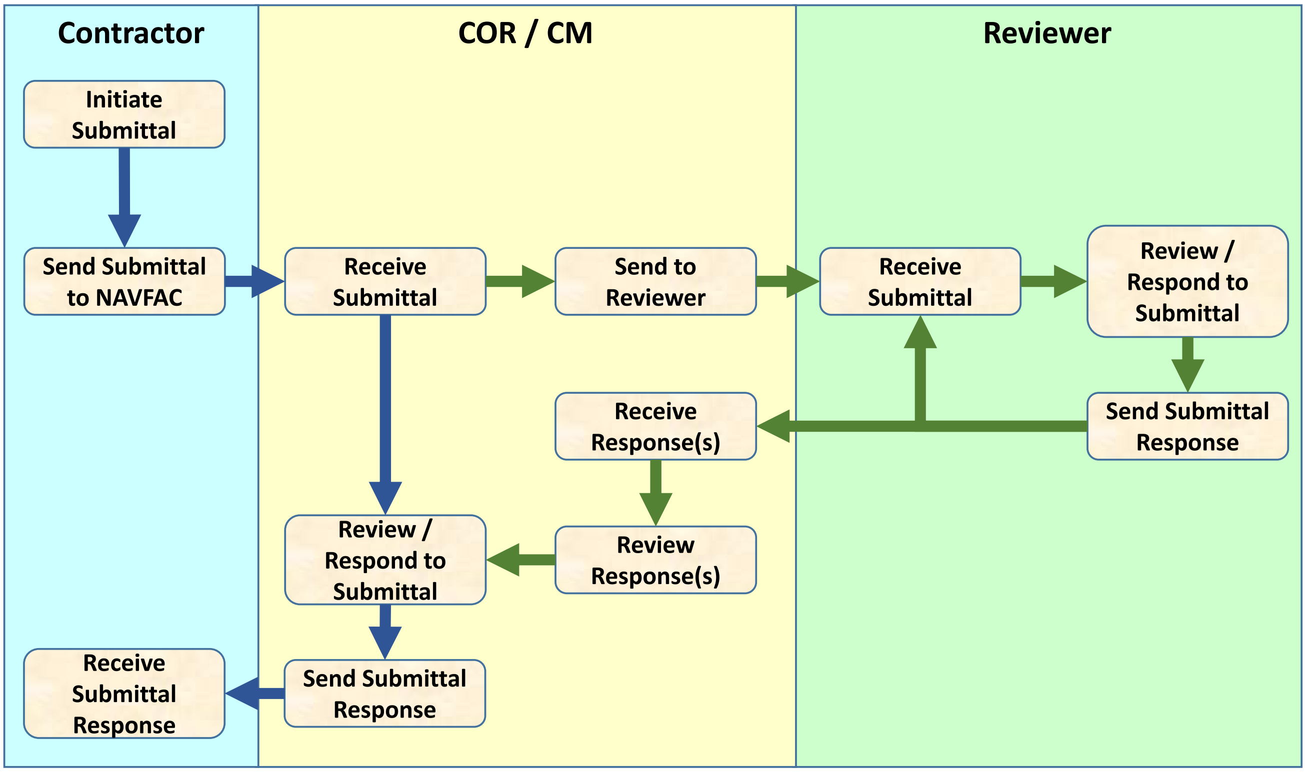




- When closing a Submittal, a COR will select a relevant status to the closure of the submittal.
  - The first 3 Statuses (those being Pending, Submitted, and In Review) will not be considered closing the Submittal.
  - If the Submittal is Rejected or Voided, is only dependent on the status selected.
    - Rejection can come from various reasons whether they be disapproval, notes on drawings, noncompliance, etc.
      - In the case of a re-submittal, a contractor should submit a new Submittal Record using the same Record Identifier as the original record with a letter appended to it. (i.e., If the original record is 100, the new record would be 100A)
    - Voiding a Submittal usually will be done in the case that a Submittal is submitted accidentally by a Contractor.
- Enter any final COR remarks as a Note. Remember that private Notes are not visible to the Contractor but Public Notes are visible to the Contractor.
- Upon closing a Submittal, the Closed Date column of the Submittal log will be populated.
- If a COR wants to 'reopen' a Submittal, they should just create a new Submittal altogether and have it follow the Submittal process as detailed. Submittals once closed should not be reopened.

TRAINEE NOTES

Submittal Workflow Recap (All)



- The swim lane diagram presents a high-level representation of the Submittal response process in eCMS.
- There are two general workflows:
  - The COR is able to respond to the Submittal directly, without any other support.
  - The COR requires other support (SME) to respond to the Submittal.
- Pay attention to the flow of the Submittal data record between swim lanes. There is no physical transfer of the information, rather when the Contractor submits the Submittal, it immediately becomes visible to the COR. When the COR adds reviewers, the information immediately becomes visible to them. The Submittal Reviewer Workflow automatically and immediately passes the Submittal information from one Reviewer to the next as reviews are completed.

TRAINEE NOTES

Summary

- A Submittal is one of many OBJECTS in eCMS
- One of the main interactions between KTR and NAVFAC
- The Submittal object is initially created by the Contractor
- When the COR receives the Submittal, there are two possible workflows:
  - Direct response by the COR
  - Additional review by SME(s)
- COR can choose which Reviewer comments to incorporate
- COR then chooses the correct final disposition and saves it to send it back to the Contractor.
- Submittals are a key indicator of overall project health and are tracked per KiloGram 20-02

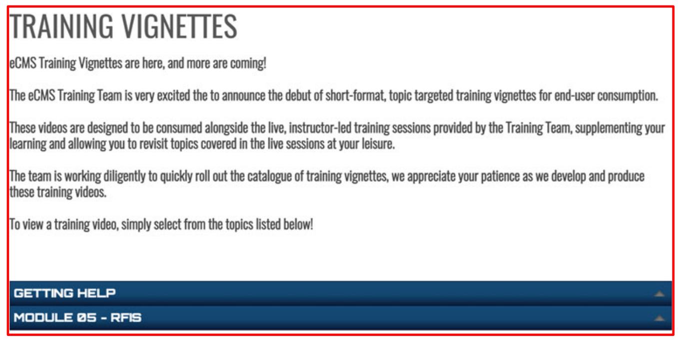
TRAINEE NOTES

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

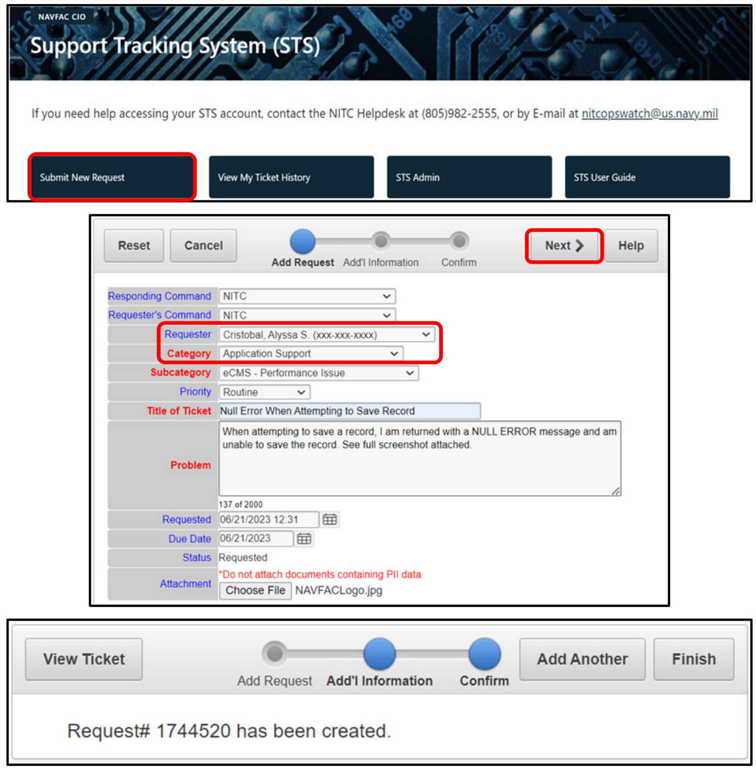
Requesting eCMS Help (All)

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

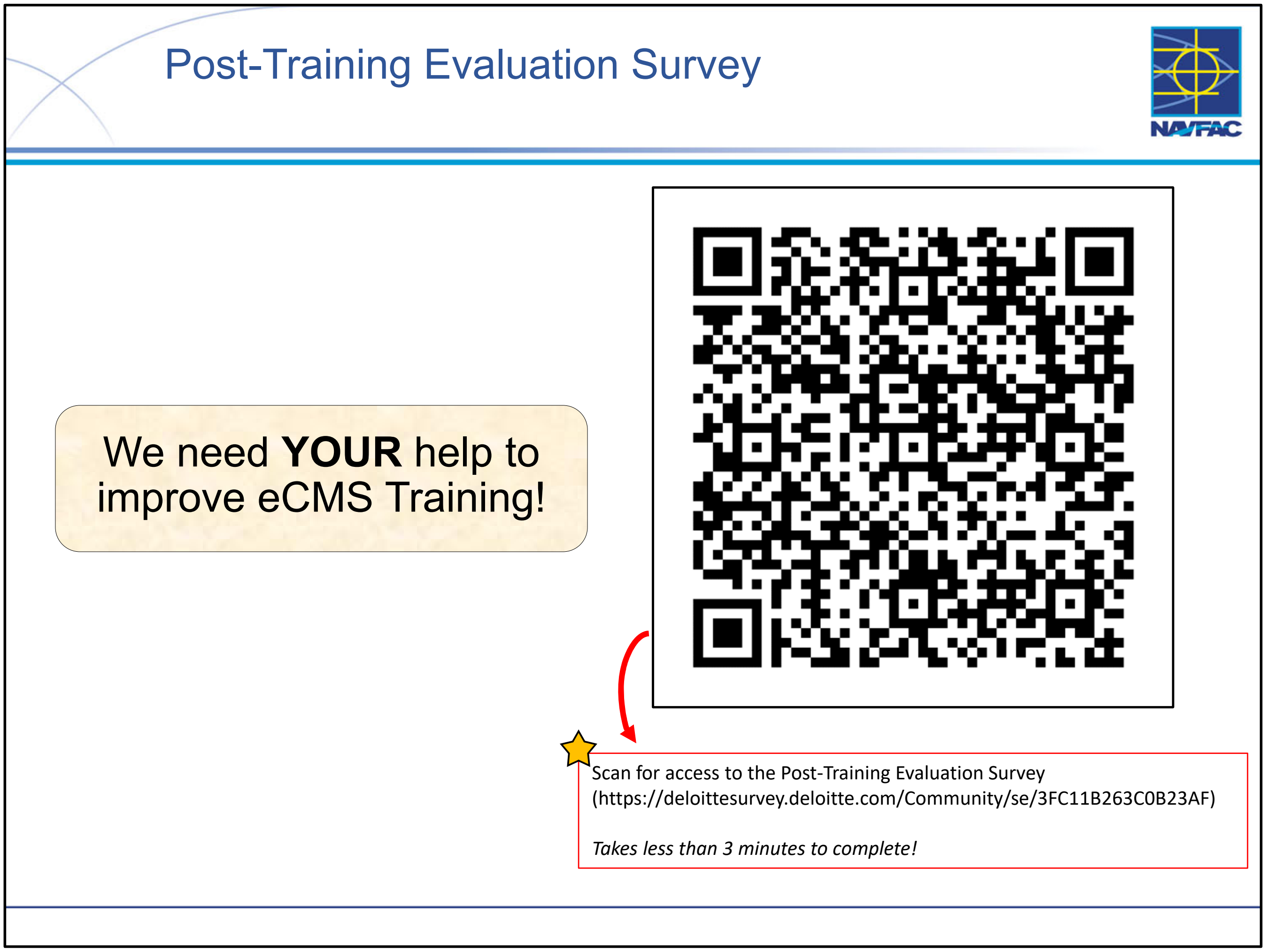
KTR Users

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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