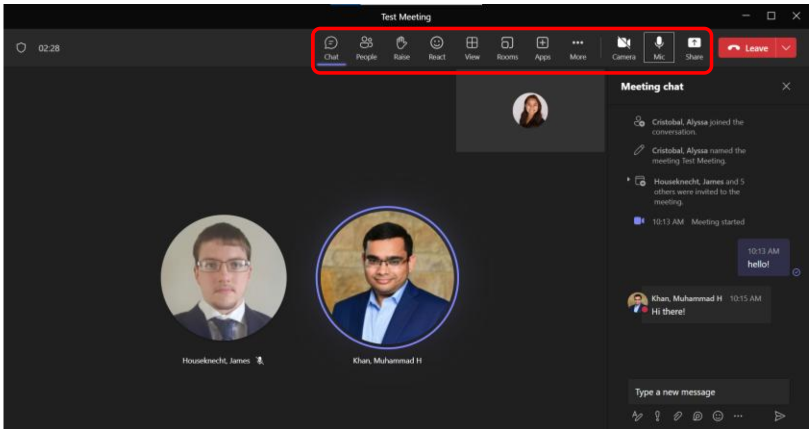
Teams Meeting Controls (All)

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 07: Daily Reports

This module includes the following topics:

- Introduction
- Daily Reports Workflow
- Creating a Daily Report (KTR)
- Copying a Previous Report
- Receiving and Responding to a Daily Report (NAVFAC User)
- Adding a Note
- Adding an Attachment via Attachments Tab
- Adding an Attachment via Documents Section
- Printing a Daily Report
- Daily Reports 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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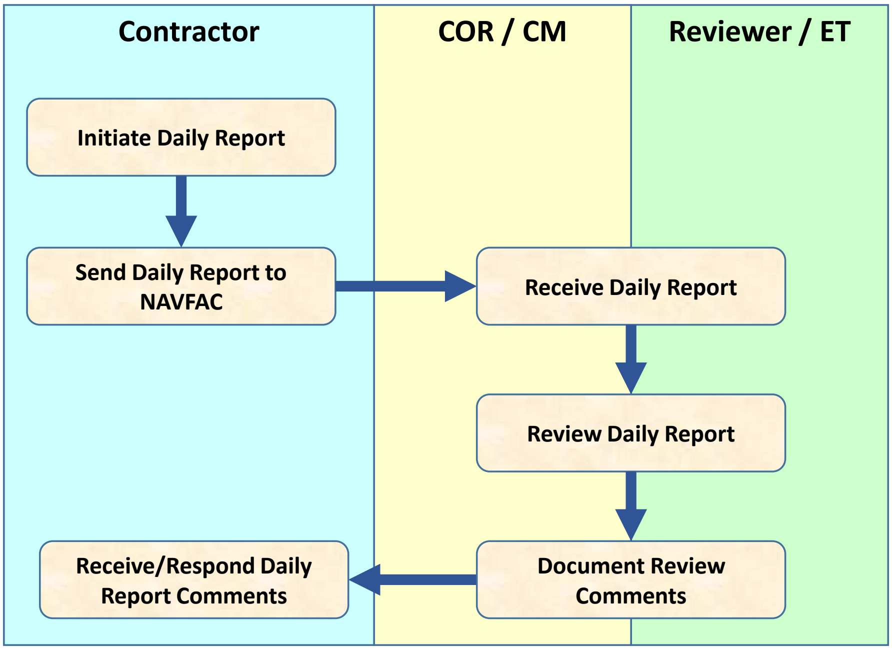
Introduction (All)

- Core interaction between KTR and NAVFAC
- Daily record of onsite work and weather conditions
  - Combination of Production Report and QC Report
- Starts when work begins on site
- KTR role creates Daily Reports
- Daily Reports stay open for 10 days after creation then lock
- A new Production and QC Flysheet will replace Daily Reports in the future

- Daily Reports are one of the core interactions between the COR or ET and the Contractor, along with Submittals and RFIs.
- A Daily Report is, in essence, equal to the Production & QC Report combined.
  - Daily Reports are contemporaneous accounts of what happened that day on the construction site from the KTR perspective.
- A Daily Report contains conditions of the day, e.g., rain, hurricane etc., and the amount of equipment, resources, labor, etc.- DRs are very important; if there are project delays during build phase caused by the Government, then the government has to pay, i.e. there is a high cost of delay.
- KTR role creates Daily Reports
- While every project will have many Daily Reports, it is important for the COR or ET to carefully review them and to use them to evaluate progress, compliance with Specifications, and to anticipate potential future problems.
- **NOTE:** New Production and QC Flysheets coming in future.
- **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

Daily Reports Workflow (All)

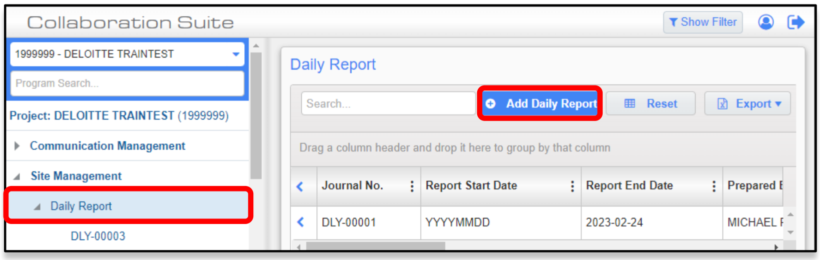


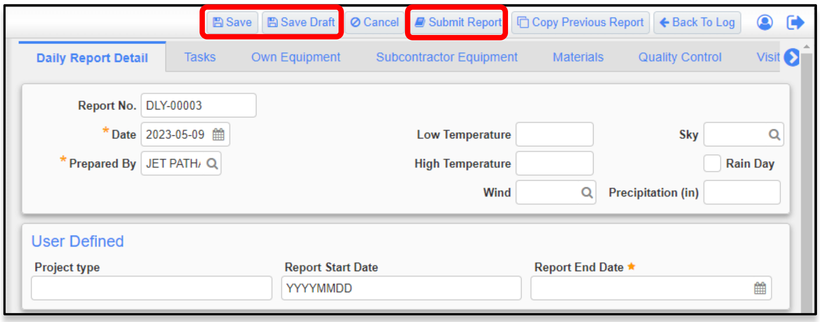
- The swim lane diagram presents a high-level representation of the Daily Report process in eCMS.
- Within eCMS, the Contractor prepares and submits Daily Reports. Once submitted, the Contractor cannot delete the Daily Report and should not edit the record unless there are corrections that need to be made indicated by the ET after review. They can add attachments and notes to the record for 10 days after the record has been created. After the 10-day period, the editing on a Daily Report locks and a user should no longer add attachments or notes. The Daily Reports are intended to become permanent, read-only records for the project.

TRAINEE NOTES

Creating a Daily Report (KTR)

1. Navigate to Daily Report
2. Click **Add Daily Report** button
3. Complete Daily Report Details Form
4. Click **Save Draft**, or **Save**
5. Add NAVFAC PDF Attachments and Notes (optional)
6. Click **Submit** button



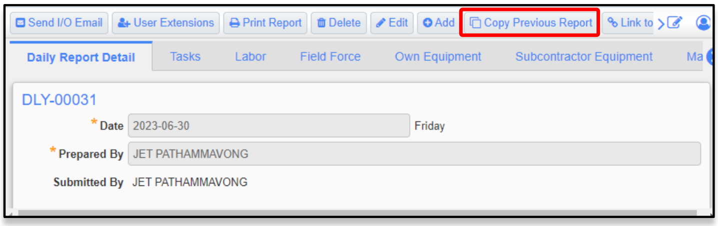


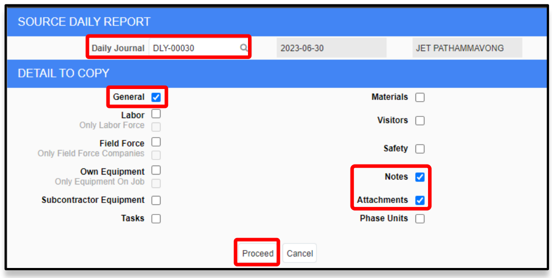
- Adding a new Daily Report is a straightforward process:
  - Navigate to the Daily Report module in eCMS (Site Management > Daily Report)
  - Select **Add Daily Report**
  - Complete Daily Report Details form, being as thorough as possible.
  - Click Save Draft or Save
  - Add Attachments or Notes
  - Select **Submit** to make available to project members.
- **Do not fill out other tabs. New Production and QC Flysheets coming in future**.
- After submitting the Daily Report it will be sent to the COR/CM and Reviewer/ET to review the daily report.
- The important thing to remember is that if you want to add Attachments or Notes to the Daily Report, you must first SAVE the Daily Report record. The completed (but not necessarily published) record must already exist <u>before</u> you can add an Attachment or a Note.
  - A user should add their Production Report, QC Report, and Testing Report as attachments in the 10-day period before the Daily Report locks. Adding attachments is further detailed later in the module.
- **NOTE:** When you **Save Draft**, you will still be in Edit mode for the record. When you select **Save** you will exit Edit mode. Both options will cause the Record to “exist”. Because of this fact it is **GOOD PRACTICE** to utilize the Save Draft button when you have additional edits to be made to the Daily Report Record, and to utilize the Save button when you are finished editing the Record.

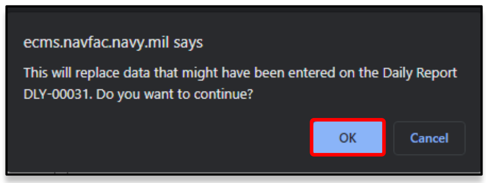
TRAINEE NOTES

Copying a Previous Report (All)

1. Add a new Daily Report
2. Click **Copy Previous Report**
3. Select the Daily Journal you want to copy from
4. Select the details to copy (General, Notes, Attachments)
5. Click **Proceed**
6. Select **OK**





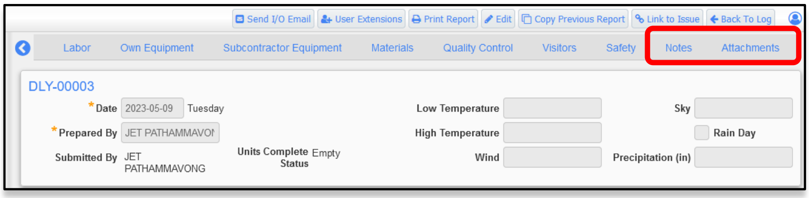


- You may find that certain details of your Daily Reports are repetitive and are often used daily.
- If you find yourself needing to copy the Details, Notes, or Attachments of a Daily Report , you can utilize the Copy Previous Report button.
  - You can choose to copy individual items or all three of them.
- **NOTE:** To Details, the source Daily Report record *must exist* meaning it must have been previously Saved, Saved as Draft, or Published.
- **NOTE:** This action will overwrite any information you have already added to the current Daily Report record. After copying, you can make any edits if necessary.

TRAINEE NOTES

Receiving and Responding to a Daily Report (NAVFAC User)

1. Navigate to and open Daily Report
2. Review Daily Report content and (if applicable) add Attachments
3. Add any relevant notes in the **Notes** section (if applicable)
4. Click **Submit** to release comments/review back to KTR

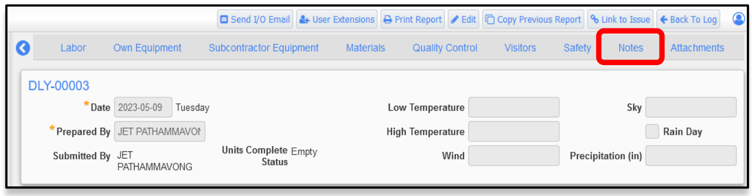


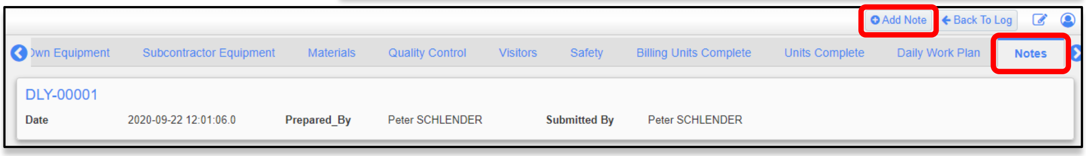
- Responding to a new Daily Report is a straightforward process:
  - Locate and open the Daily Report record.
  - Review the Daily Report and add attachments if applicable.
  - Add any relevant notes in the Notes section.
  - Select **Submit** to make available to project members.
- **NOTE:** In practice, when the ET reviews the daily report submitted by contractor (KTR) to compare with what they saw in the field, they will add **Notes** in the record. The contractor will review and respond to the ET's notes also in the **Notes** section of the record. The ET and KTR will work together to address any discrepancies in Daily Reports before the 10-day period ends.
- **NOTE:** The ONLY way to insert a proper, digital signature on a file is to download it, digitally sign it, then upload the signed version. The PSPDF Viewer displays the first layer of a PDF, and adding a digital signature is essentially adding another layer. In order to view the signature within eCMS, download the document via File>Print>"Microsoft Print to PDF" as printer. The user can then save the document locally and upload it to eCMS. The "Microsoft Print to PDF" option compresses the layers of the file so the user can view the signature within the PSPDF Viewer.
- If you would like to open a PDF from your browser's PDF viewer: Navigate to the Attachments Tab, right-click on the file name, and select "Open Link in New Tab" (see Module 10 for more detailed steps).

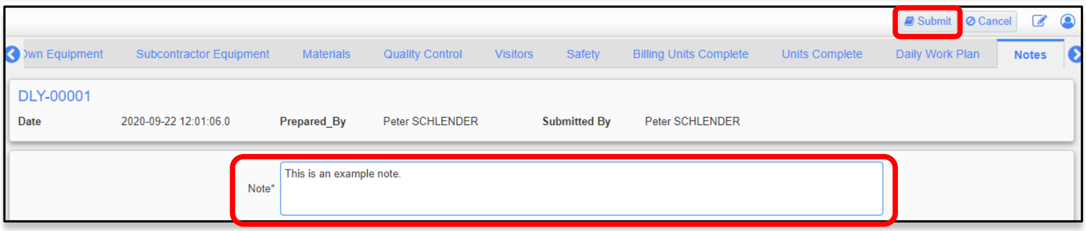
TRAINEE NOTES

Adding a Note (All)

1. Navigate to and open a Daily Report
2. Click **Notes**
3. Click **Add Note**
4. Add any relevant Notes
5. Click **Submit**





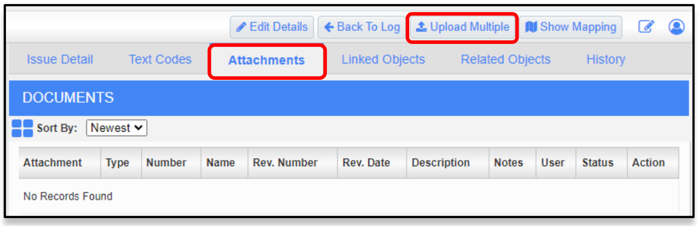


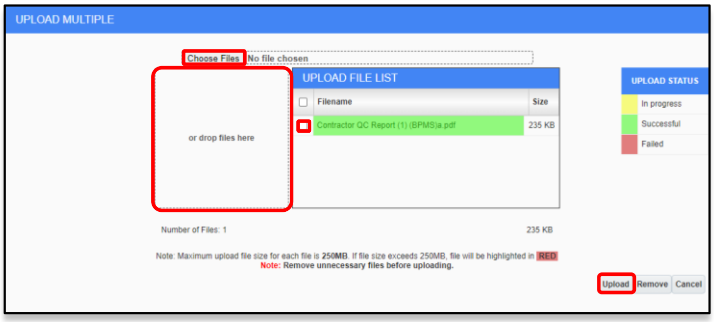
- Adding notes is a straightforward process. You can access previous notes and add notes via the Notes tab.
- You **MUST SAVE** the Object before you can add notes. A note cannot be added to the record until the record "exists" in eCMS. When creating an object, the completed (but not necessarily submitted) record must already exist before you can add a note to it.
- You can continue to add additional notes after you have submitted the Object, within the 10-day period of Daily Report creation.

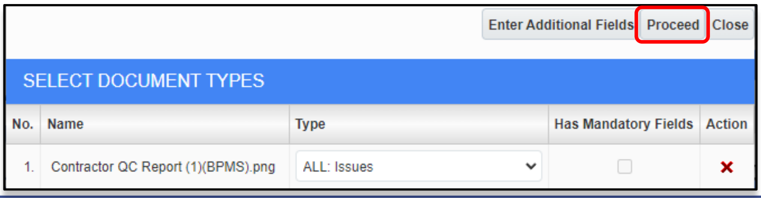
TRAINEE NOTES

Adding an Attachment via Attachments Tab (All)

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





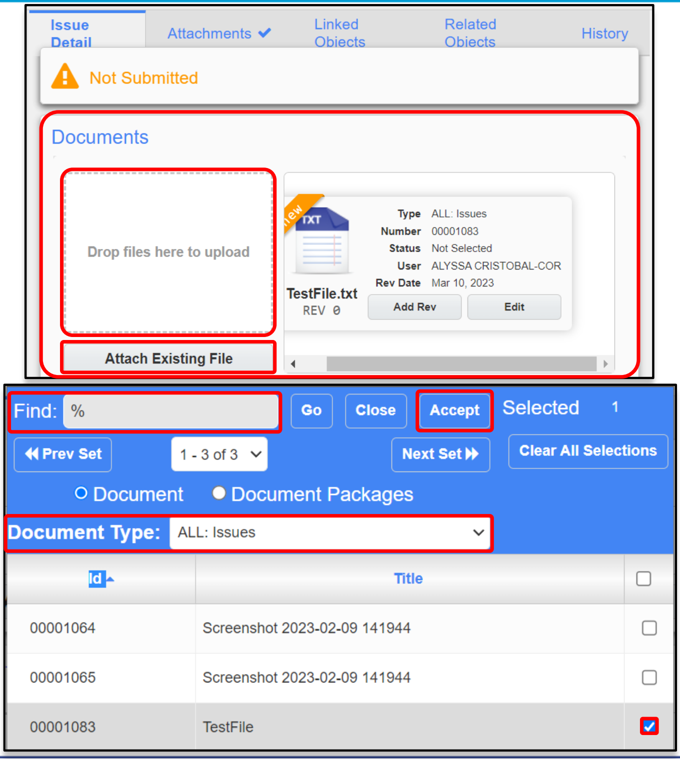


- Adding attachment(s) can be done one of two ways. The first is to upload via the Attachments tab.
- You **MUST SAVE** the Object before you can add attachments. An attachment cannot be added to the record until the record "exists" in eCMS. When creating an object, the completed (but not necessarily submitted) record must already exist before you can add an attachment to it.
- Ensure you follow a rigorous, consistent file naming convention for all attachments
  - Filenames for attachments become hyperlink URLs in eCMS. Include only Uppercase, Lowercase, Numbers, Hyphens, Underscores, and Periods in your filenames. Do not include spaces or any "weird" characters in filenames.
  - **GOOD PRACTICE:** A user should include the dates in the filename of the documents so ETs will be able to identify the Testing Reports based on dates in the Documents module of eCMS.
- You can continue to add attachments after you have submitted the Object, within the 10-day period.
- A user should add their Production Report, QC Report, and Testing Report as attachments in the 10-day period after the creation date before the Daily Report locks.
  - In the case that the Testing Report is not available within the 10-day period, the user should create a new Daily Report record and attach the Testing Report to that new record. They can edit the Record Identifier to use the original record's number with a letter appended to it (i.e., if the original record is 100, the new record would be 100A). The newly created record should have the same "Report Start Date" and "Report End Date" as the original Daily Report record.
  - The user should also submit the Testing Report as an attachment to the CQC Report at the end of each month. Provide a copy of the final Testing Plan and Log to the OMSI preparer for inclusion into the OMSI documentation.

TRAINEE NOTES

Adding an Attachment via Documents Section (All)

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

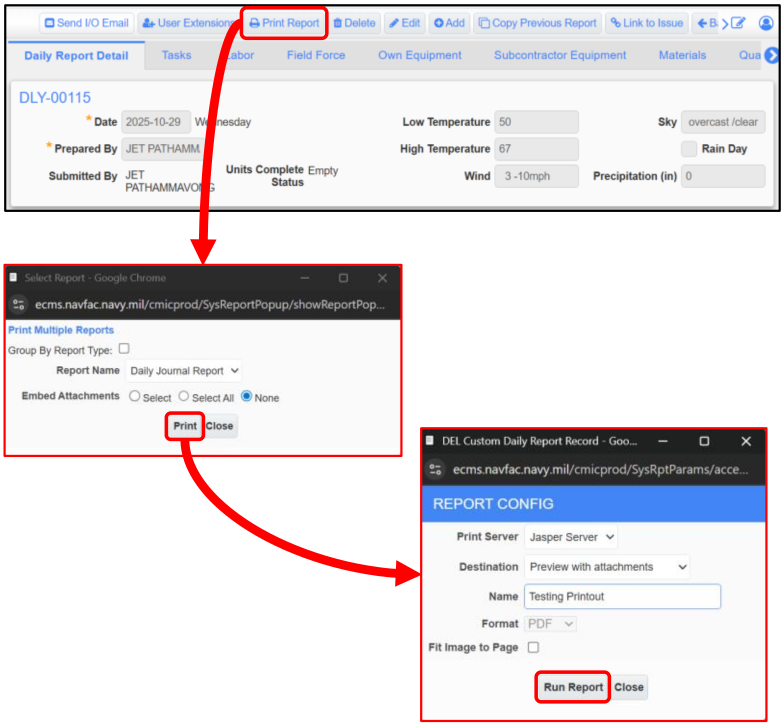


- Adding attachment(s) can be done one of two ways. The second is to upload via the Documents section.
- You **MUST SAVE** the Object before you can add attachments. An attachment cannot be added to the record until the record "exists" in eCMS. When creating an object, the completed (but not necessarily submitted) record must already exist before you can add an attachment to it.
- Ensure you follow a rigorous, consistent file naming convention for all attachments.
  - Filenames for attachments become hyperlink URLs in eCMS. Include only Uppercase, Lowercase, Numbers, Hyphens, Underscores, and Periods in your filenames. Do not include spaces or any "weird" characters in filenames.
  - **GOOD PRACTICE:** ETs will have access to Documents. A user should include the dates in the filename of the documents so ETs will be able to identify the test reports based on dates.
- You can continue to add attachments after you have submitted the Object, within the 10-day period.
- A user should add their Production Report, QC Report, and Testing Report as attachments in the 10-day period after the creation date before the Daily Report locks.
  - In the case that the Testing Report is not available within the 10-day period, the user should create a new Daily Report record and attach the Testing Report to that new record. They can edit the Record Identifier to use the original record's number with a letter appended to it (i.e., if the original record is 100, the new record would be 100A). The newly created record should have the same "Report Start Date" and "Report End Date" as the original Daily Report record.
  - The user should also submit the Testing Report as an attachment to the CQC Report at the end of each month. Provide a copy of the final Testing Plan and Log to the OMSI preparer for inclusion into the OMSI documentation.

TRAINEE NOTES

Printing a Daily Report (All)

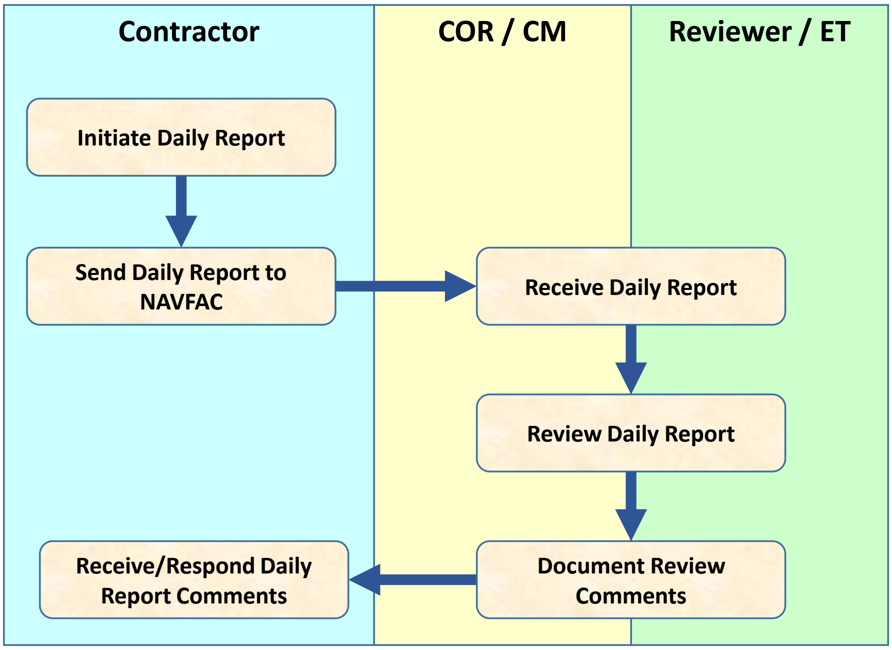
1. Navigate to and open Daily Report record
2. Click **Print Report** button to launch the Select Report screen
3. Complete report details and select **Print** to launch the Report Config screen
4. Select **Run Report**



- Printing a Daily Report is a very straightforward process:
  - Navigate to and open the Daily Report 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 Daily Report record. Some pertinent information to remember when reviewing your printout include:
  - The Status of the printout can be reviewed in the top right corner of the printout.

TRAINEE NOTES

Daily Reports Workflow Recap (All)



- The swim lane diagram presents a high-level representation of the Daily Report process in eCMS.
- Within eCMS, the Contractor prepares and submits Daily Reports. Once submitted, the Contractor cannot delete the Daily Report and should not edit the record unless there are corrections that need to be made indicated by the ET after review. They can add attachments and notes to the record for 10 days after the record has been created. After the 10-day period, the editing on a Daily Report locks and a user should no longer add attachments or notes. The Daily Reports are intended to become permanent, read-only records for the project.

TRAINEE NOTES

Summary

- A Daily Report is one of many OBJECTS in eCMS and is one of the most important – along with s and Submittals
- Daily Reports are created and submitted by the Contractor
- Daily Reports stay open for 10 days after the creation date then lock
- The ET enters their notes in the Notes section. The KTR responds in the same section.
- Attachments can be added and Daily Reports can be linked to Issues after submission
- Daily Reports should be carefully reviewed each day to evaluate progress and to help the COR anticipate future problems
- A new Production and QC Flysheet will replace Daily Reports in the future.

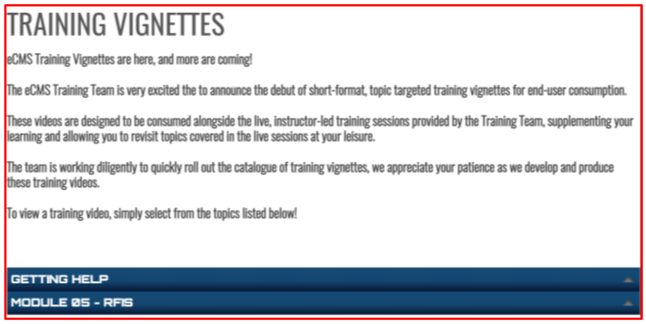
TRAINEE NOTES

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

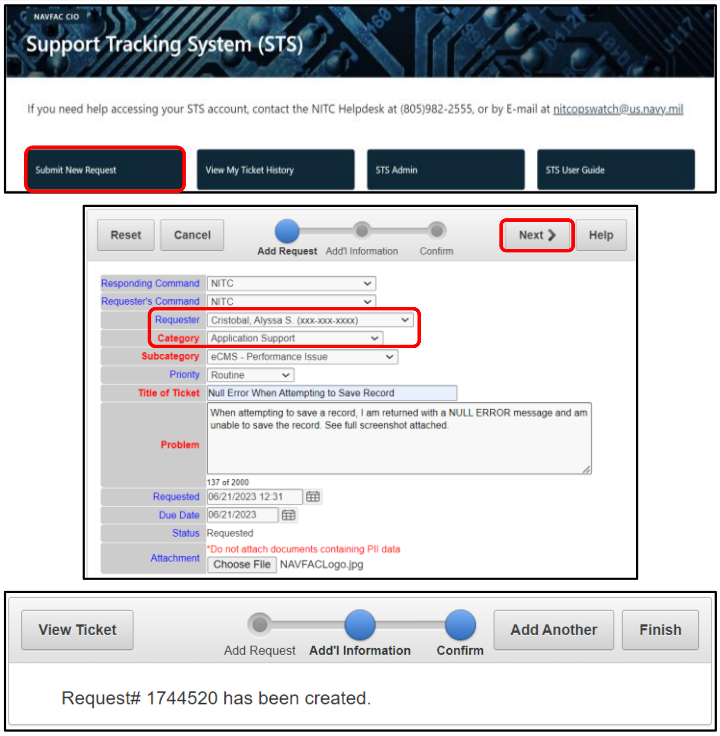
Requesting eCMS Help (All)

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

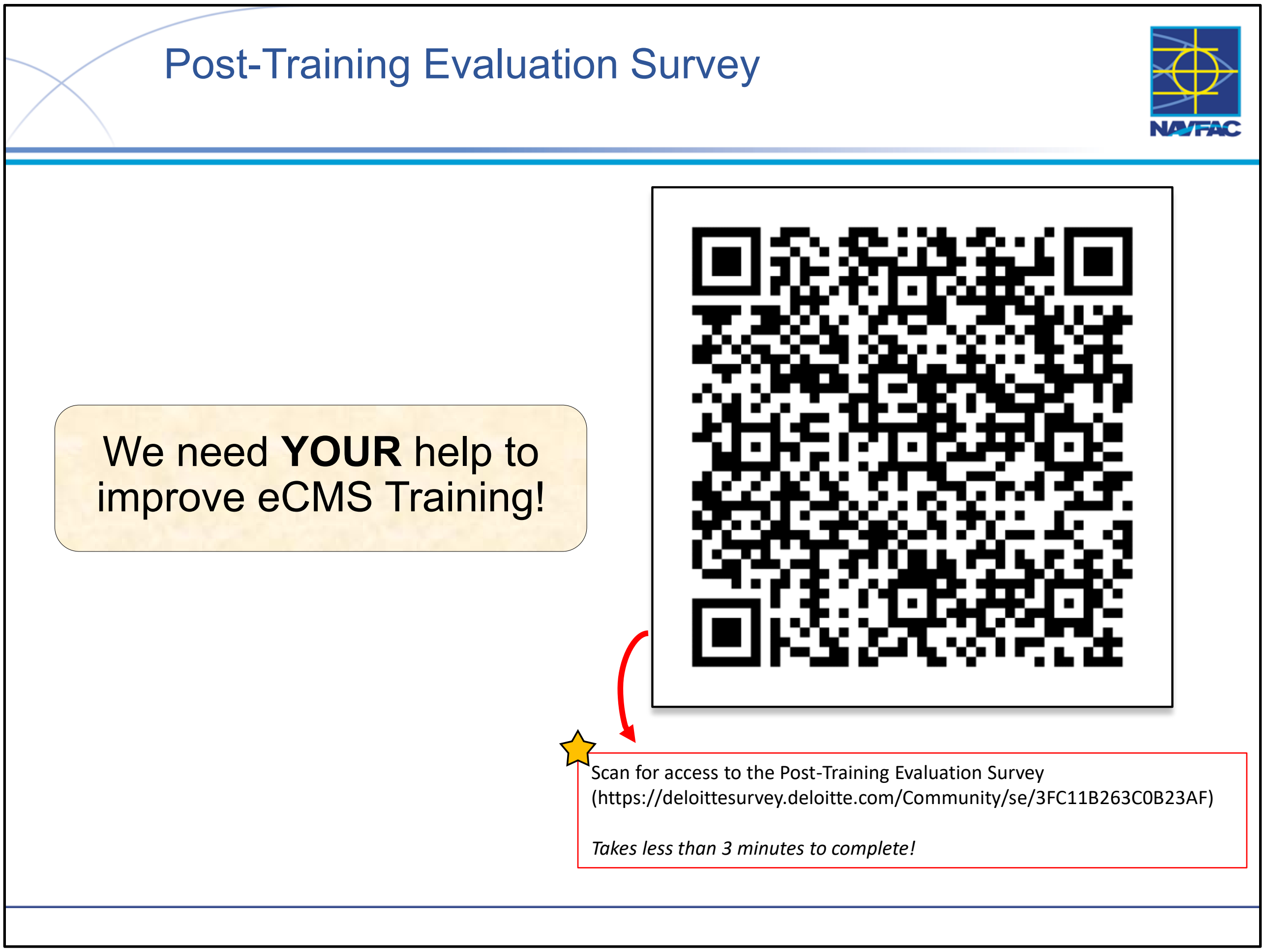
KTR Users

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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