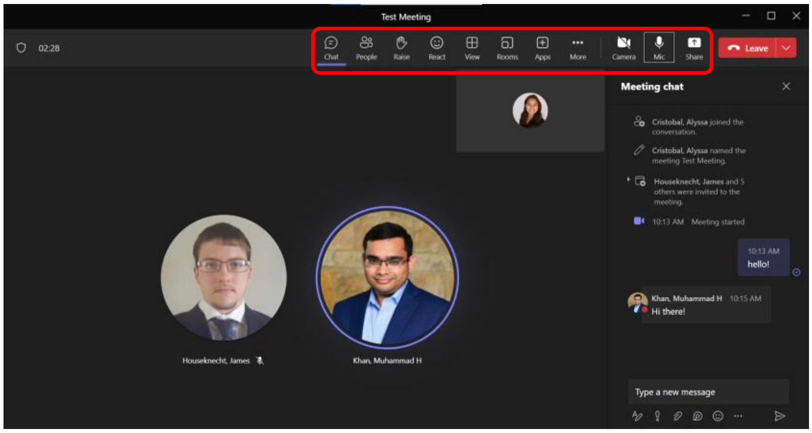
Teams Meeting Controls (All)

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 11: Checklists

This module includes the following topics:

- Introduction
- Checklist Workflow
- Checklist Visibility
- Creating a Checklist
- Structure of a Checklist
- KPI Checklist
- GOV QA Report Checklist
- Adding Attachments to a Checklist
- Adding Attachments to Checklist Items
- Adding Notes to a Checklist
- Adding Notes to Checklist Items
- Linking Issues to Checklist Items
- Relating a Checklist to Another eCMS Object
- Printing a Checklist
- Checklist 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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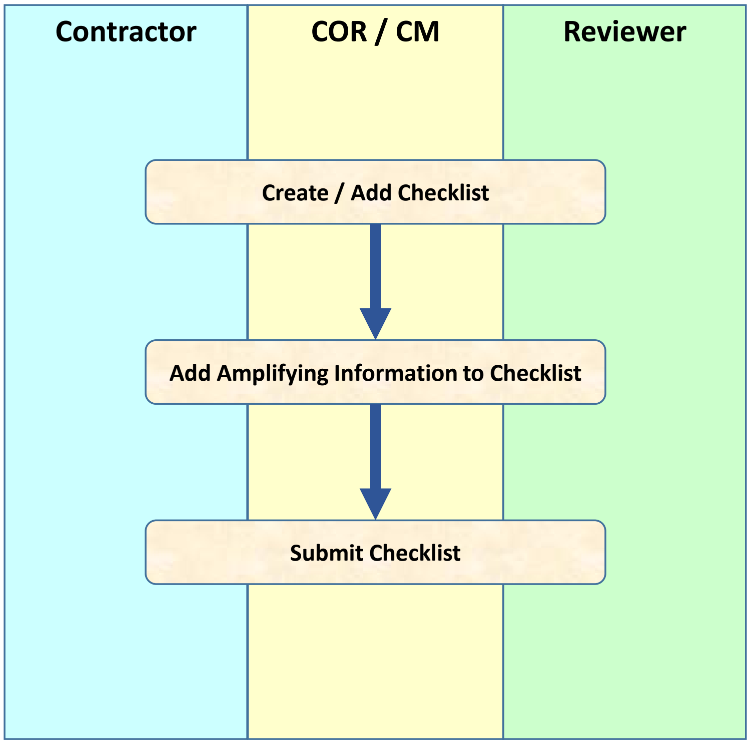
Introduction (All)

- Why Checklists?
  - Easy-to-complete forms
  - Ensure nothing is missed when performing an activity
  - Document completion or status for an activity
- Checklists in eCMS
  - Some are originated by Contractor, some by Government
  - Some map to existing processes (e.g., “3 Phases of Work” or “Red Zone”)
  - Some capture important data that you “just don’t want to forget” (e.g., CPARS Checklist)
  - You can create an Issue directly from a Checklist Item (more on that later)
  - Fill out only one KPI Checklist per project. Edit to update.
  - You must complete all Checklist Items to Submit a Checklist

- Checklists are easy-to-use forms that we use to make sure that we haven’t inadvertently missed something in a complex activity. They can (and often are) also be used to document the completion or status of an activity. For example, the NAVFAC Red Zone includes many activities performed over what could be an extended period of time by many people and organizations. It is very important that none of these activities be missed or overlooked as they’re all critical to the ultimate delivery of our work to our customers. Similarly, we might want to document that certain activities were completed and when they were completed – such as ensuring that Pre-construction submittals were delivered on time.
- Within eCMS, there are many Checklists. Some of them are originated by the Contractor and some by the Government. Generally, this aligns with BMS processes. For example, standard Checklists documenting completion of work associated with our “3 Phases of Work” are completed by the Contractor. Once completed by one party (NAVFAC or the Contractor), a Checklist MAY be visible to the other party. But even if the Checklist IS visible to the other party, that other party may or may not be able to edit it.
- Use only 1 KPI Checklist per project, continue to update that KPI Checklist as opposed to creating a new KPI Checklist.
- You must complete all Checklist Items prior to submitting a Checklist
- **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.**

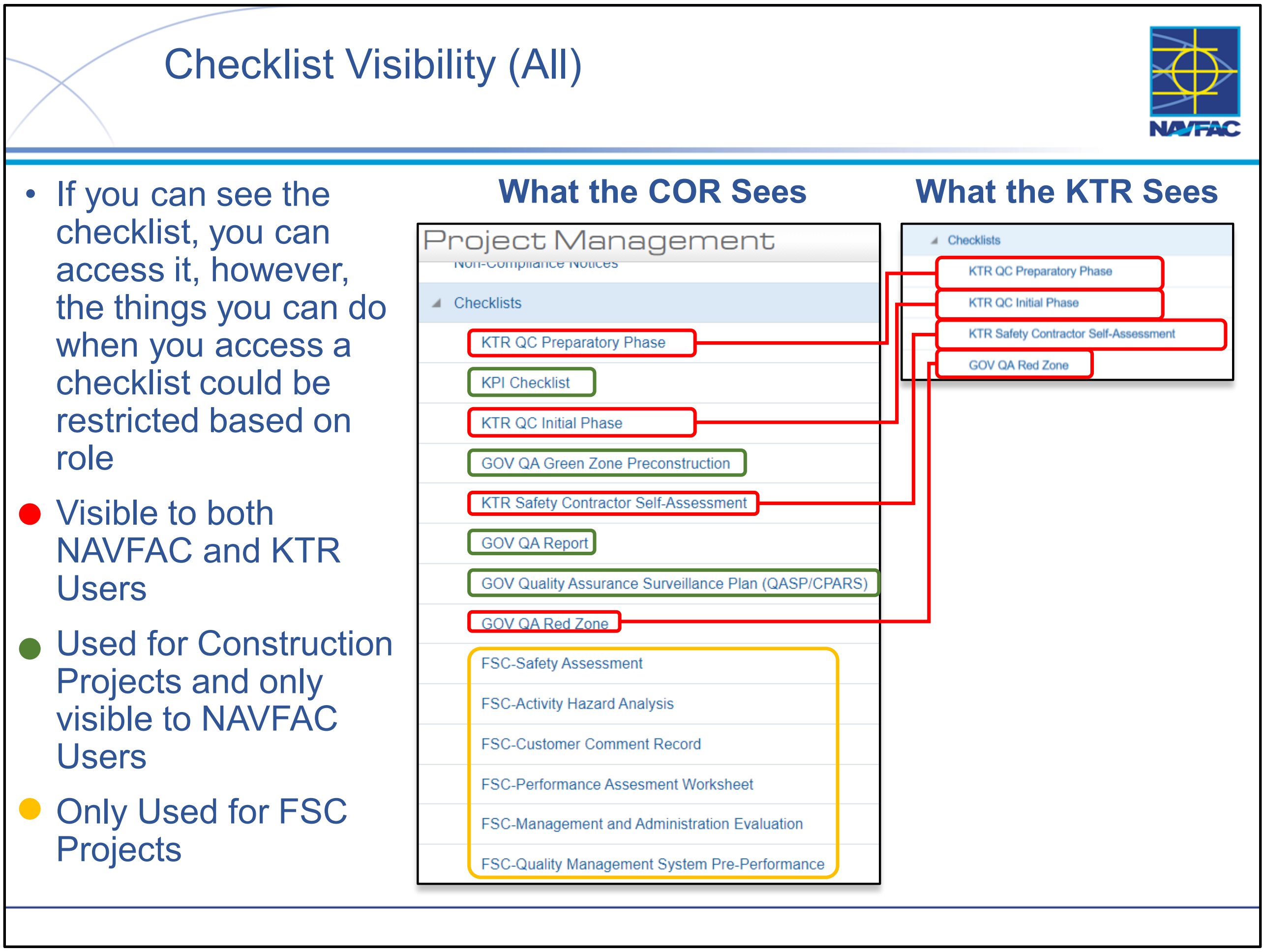
TRAINEE NOTES

Checklist Workflow (All)



- As the workflow diagram indicates, just about anyone can create a Checklist – keeping in mind that not every role can create every Checklist.
- Once a Checklist has been created and saved in draft form, you can add amplifying information to it, including:
  - Attachments.
  - Related objects.
  - Notes.
  - Issues.
- Then, when the Checklist and all of its amplifying information are complete, you can submit it.

TRAINEE NOTES

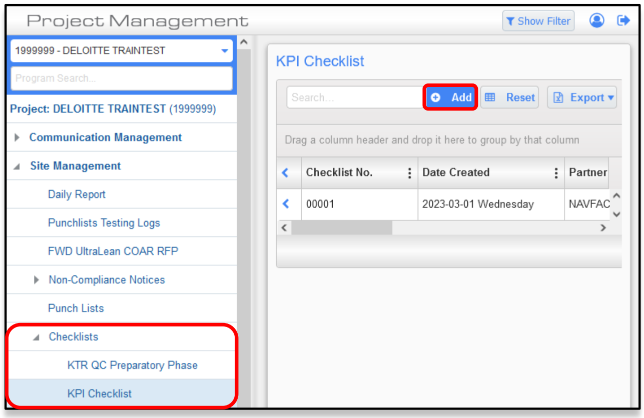


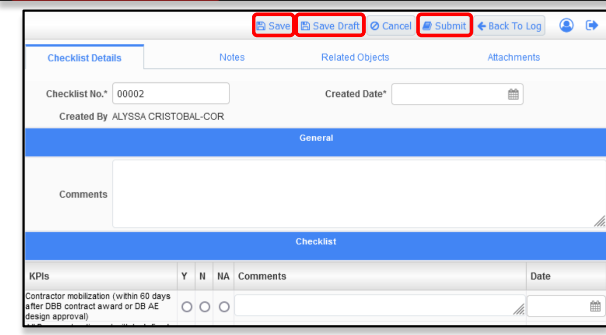
- In all cases, if you can see the Checklist in the navigation pane, you can view it. But what the COR can see is different than what the Contractor can see.
- But… As mentioned in the previous topic, even if you can view a Checklist, you might not be able to edit the Checklist.
- The following are used for construction projects and only visible to NAVFAC users:
  - KPI Checklist
  - GOV QA Green Zone Preconstruction
  - GOV QA Report
  - GOV Quality Assurance Surveillance Plan (QASP/CPARS)
- The following Checklists are only used for FSC projects:
  - FSC-Safety Assessment
  - FSC-Activity Hazard Analysis
  - FSC-Customer Comment Record
  - FSC-Performance Assessment Worksheet
  - FSC-Management and Administration Evaluation
  - FSC-Quality Management System Pre-Performance

TRAINEE NOTES

Creating a Checklist (All)

1. Navigate to Checklists
2. Click desired Checklist Type
3. Click **Add** Button
4. Complete the Checklist
5. Click **Save** to save without submitting
6. Add amplifying information if desired
7. Click **Submit** to make available to project members



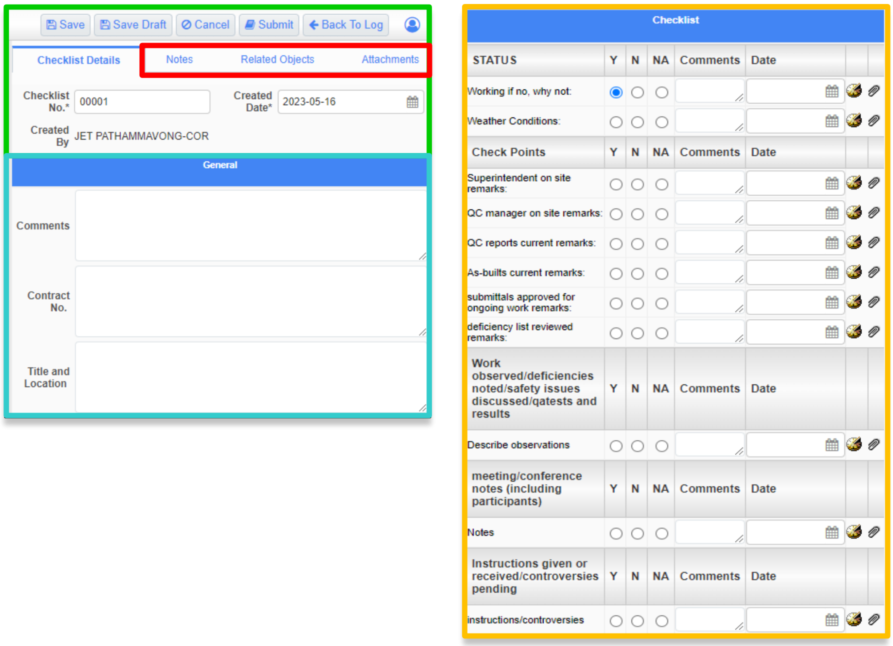


- Adding a new Checklist is a fairly straightforward process:
  - Navigate to Checklists (Site Management > Checklists)
  - Choose desired Checklist Type
  - Click **Add** button
  - Complete the Checklist
  - Click Save or Save Draft to save without submitting
  - Add additional information if desired:
    - Attachments
    - Notes
    - Linked Issues
    - Related Objects
  - Click Submit to make available to project members.
- The important thing to remember is that if you want to add Attachments or Notes to the Checklist, you must first SAVE the Checklist record. The completed (but not necessarily published) record must already exist <u>before</u> you can add an Attachment or a Note.
- **NOTE:** When you **Save Draft**, you will still be in Edit mode for the Checklist 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 Meeting Record, and to utilize the Save button when you are finished editing the Record.
- **NOTE:** Before you are able to submit the Checklist, all **Checklist Items** must be completed, meaning, each row of the Checklist must be filled out.

TRAINEE NOTES

Structure of a Checklist (All)

- Actions
- General Checklist Information
- Checklist Items
- Additional Checklist Features

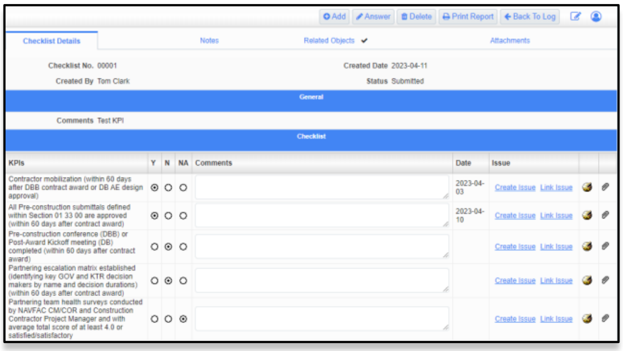


- The structure of a Checklist will vary depending on the Checklist
- Checklists are eCMS Objects that are comprised of smaller eCMS Objects, called Checklist Items
- [GREEN] **Actions** – Where you can perform actions on the Checklist like Save, Save Draft, Submit, etc. as well as the auto populated Checklist No., the Created Date, and who it was created by.
  - **NOTE:** When you Save Draft, you will still be in Edit mode for the Checklist 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 Meeting Record, and to utilize the Save button when you are finished editing the Record
  - We recommend not editing the Checklist No. unless you follow a rigorous naming convention to keep the log of checklists organized.
- [BLUE] **General Checklist Information** – A section for providing all relevant information to the Checklist as a whole. You can provide additional specifics in the Checklist Items.
- [YELLOW] **Checklist Items** – These are the specific line items that make up a Checklist and can be split into sub sections. Each Checklist Item has a "Y", "N", and "N/A" response option.
  - For each Checklist Item, you can add Attachments/Notes. You can also link to an existing eCMS Issue, or you can create a new Issue directly from a Checklist (more on this later).
  - It is advisable to add supplemental information in the Comments section specifically when the selection is either an "N" or "N/A".
  - **NOTE:** You *must* fill out all Checklist Items in order to submit the Checklist
- [RED] **Additional Checklist Features** – This is where you can add Notes, Related Objects, and Attachments (more on this later)

TRAINEE NOTES

KPI Checklist (All)

- A "Special Case" Checklist
- Directly captures information about 5 KPIs defined in KiloGram 20-02
  - PO.2: Contractor mobilization (within 60 days after DBB contract award or DB AE design approval)
  - PO.3: All Pre-construction submittals defined within Section 01 33 00 are approved (within 60 days after contract award)
  - PO.4: Pre-construction conference (DBB) or Post-Award Kickoff meeting (DB) completed (within 60 days after contract award)
  - PO.5: Partnering escalation matrix established (identifying key GOV and KTR decision makers by name and decision durations) (within 60 days after contract award)
  - PO.14: Partnering team health surveys conducted by NAVFAC CM/COR and Construction Contractor PM and with average total score of at least 4.0 or satisfied/satisfactory
- ***** 1 KPI CHECKLIST PER PROJECT *****

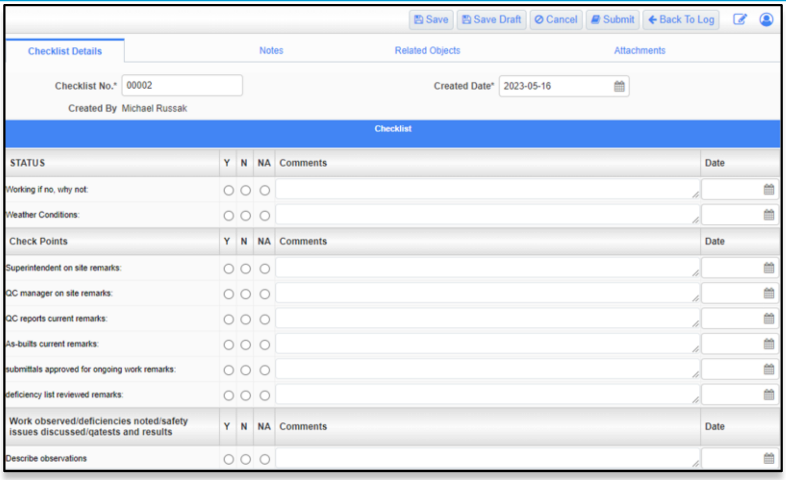


- KPI Checklists are a special type of Checklist in eCMS because the data (KPIs) from this eCMS Object is directly captured in accordance with KiloGram 20-02. The KPIs that are pulled out of this eCMS Object are as follows:
  - PO.2: Contractor mobilization (within 60 days after DBB contract award or DB AE design approval)
  - PO.3: All Pre-construction submittals defined within Section 01 33 00 are approved (within 60 days after contract award)
  - PO.4: Pre-construction conference (DBB) or Post-Award Kickoff meeting (DB) completed (within 60 days after contract award)
  - PO.5: Partnering escalation matrix established (identifying key GOV and KTR decision makers by name and decision durations) (within 60 days after contract award)
  - PO.14: Partnering team health surveys conducted by NAVFAC CM/COR and Construction Contractor PM and with average total score of at least 4.0 or satisfied/satisfactory
- When filling out this specific Checklist, if you know the answer to the Checklist Item, select either Y or N and enter in the date of the event. It is advisable to add supplemental information in the Comments section specifically when the selection is either an "N" or "N/A".
- If the answer is unknown at the time you are completing the KPI Checklist, select "N/A" for the time being, you can come back and edit this Checklist later and update the response for that Checklist item.
  - **NOTE: Do not create a new KPI Checklist, simply continue updating the existing Checklist.**

TRAINEE NOTES

GOV QA Report Checklist (All)

- A very common eCMS Checklist – often times filled out on a daily basis.
- Method of determining if the contracted work meets the required standards and specifications

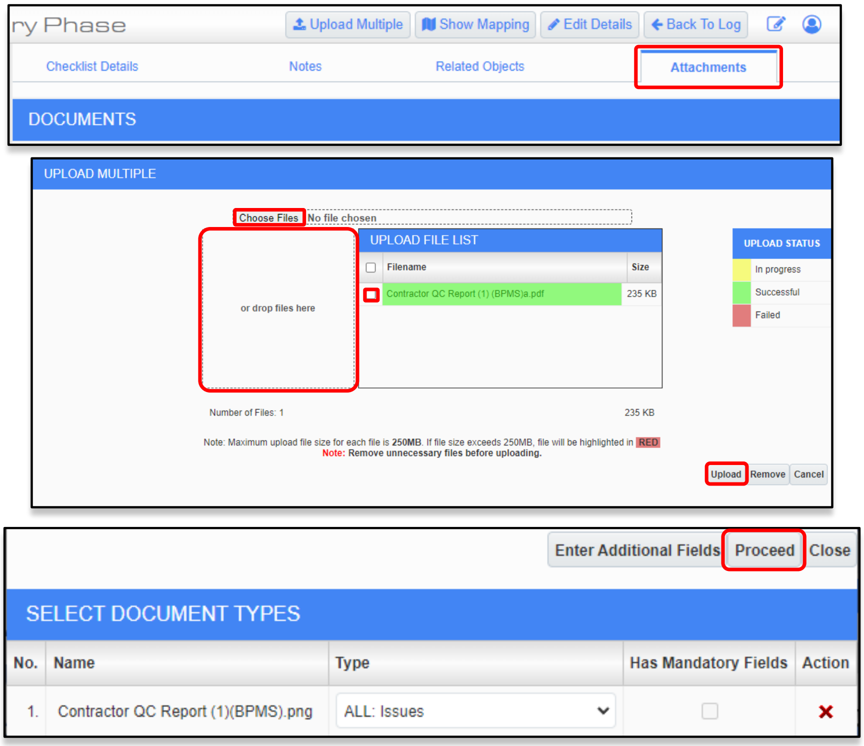


- Another very common eCMS Checklist is the GOV QA Report which is used as a "snapshot" for determining if the contracted work meets the required standards and specifications.
- In the context of other eCMS Checklists, this Checklist is fairly simple, containing only 10 Checklist Items.
- For the ET, this is commonly filled out on a daily basis.

TRAINEE NOTES

Adding Attachments to a Checklist (All)

1. Navigate to Checklist
2. Click **Attachments** tab
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**

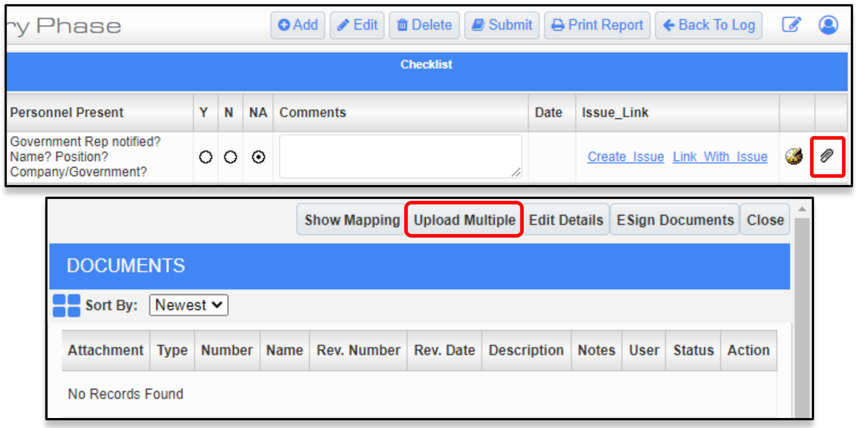


- As mentioned previously, you can add Attachments to the Checklist as a whole, or to Checklist Items. Covered in the slide is how to add Attachments to the Checklist as a whole.
- The important thing to remember is that if you want to add Attachments to the Checklist, you must first SAVE the Checklist record. The completed (but not necessarily submitted) record must already exist before you can add an Attachment. You can continue to add attachments after it has been submitted.
- **GOOD PRACTICE**: Ensure you follow a rigorous, consistent file naming convention for all attachments

TRAINEE NOTES

Adding Attachments to Checklist Items (All)

1. Navigate to Checklist Item you wish to add Attachments to
2. Select the paper clip icon
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**

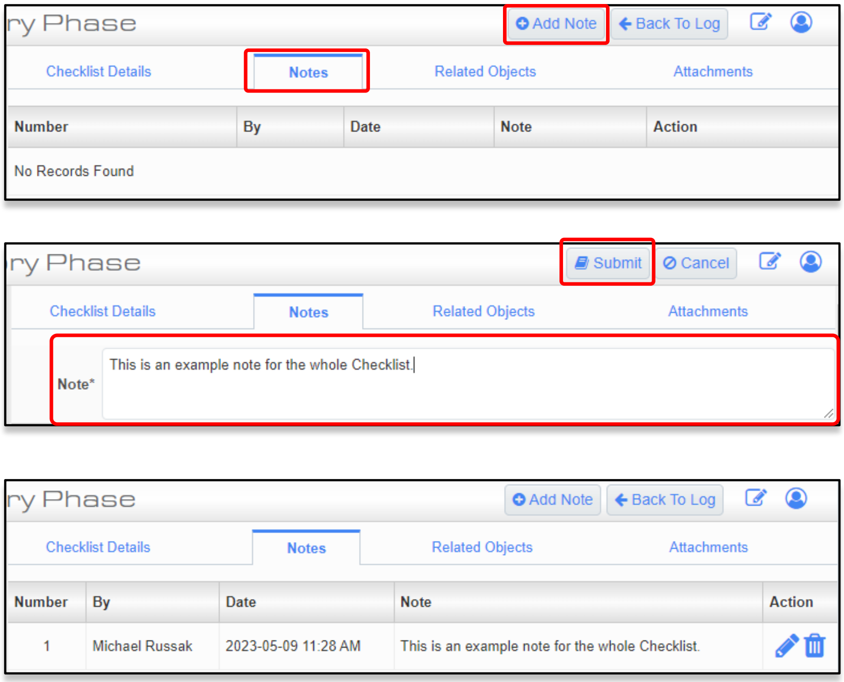


- As mentioned previously, you can add Attachments to the Checklist as a whole, or to Checklist Items. Covered in the slide is how to add Attachments to specific Checklist Items.
- **NOTE:** After the initial 2 steps, the process is ***identical*** to the process for adding Attachments to an eCMS Object as shown in the previous slide.
- The important thing to remember is that if you want to add Attachments to the Checklist, you must first SAVE the Checklist record. The completed (but not necessarily submitted) record must already exist <u>before</u> you can add an Attachment. You can continue to add attachments after it has been submitted.
- **GOOD PRACTICE**: Ensure you follow a rigorous, consistent file naming convention for all attachments

TRAINEE NOTES

Adding Notes to a Checklist (All)

1. Navigate to Checklist
2. Click **Notes** tab
3. Click **Add Note**
4. Fill out Note
5. Select **Submit**

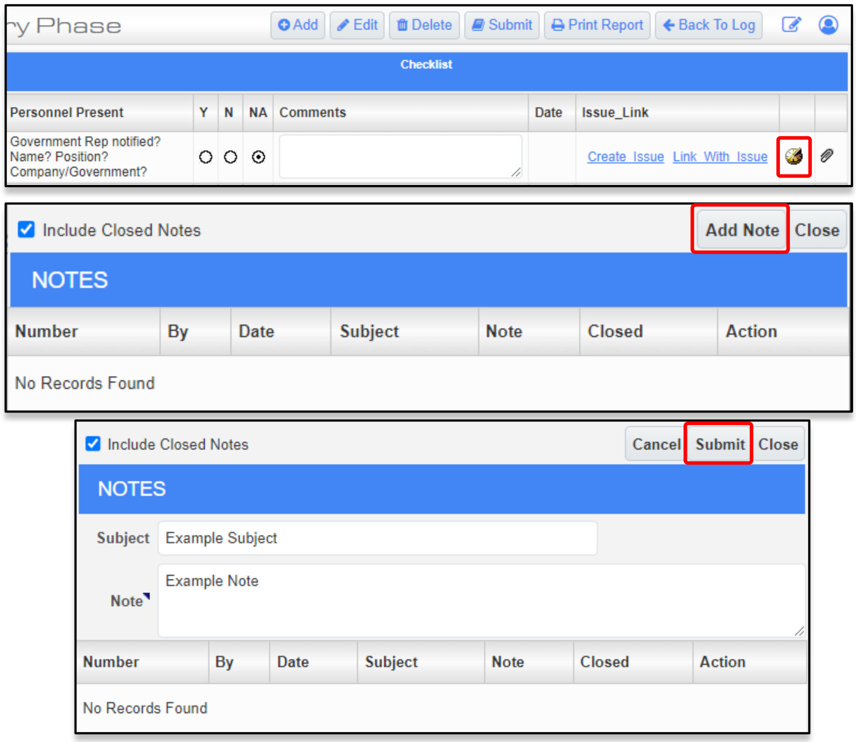


- As mentioned previously, you can add Notes to the Checklist as a whole, or to Checklist Items. Covered in the slide is how to add Notes to the Checklist as a whole.
- The important thing to remember is that if you want to add Notes to the Checklist, you must first SAVE the Checklist record. The completed (but not necessarily submitted) record must already exist before you can add a Note. You can continue to add Notes after it has been submitted.

TRAINEE NOTES

Adding Notes to Checklist Items (All)

1. Navigate to Checklist Item you wish to add Notes to
2. Select the Note icon
3. Click **Add Note**
4. Fill out Subject
5. Fill out Note
6. Click **Submit**



- As mentioned previously, you can add Notes to the Checklist as a whole, or to Checklist Items. Covered in the slide is how to add Notes to specific Checklist Items.
- The important thing to remember is that if you want to add Notes to the Checklist, you must first SAVE the Checklist record. The completed (but not necessarily submitted) record must already exist before you can add a Note. You can continue to add Notes after it has been submitted.

TRAINEE NOTES

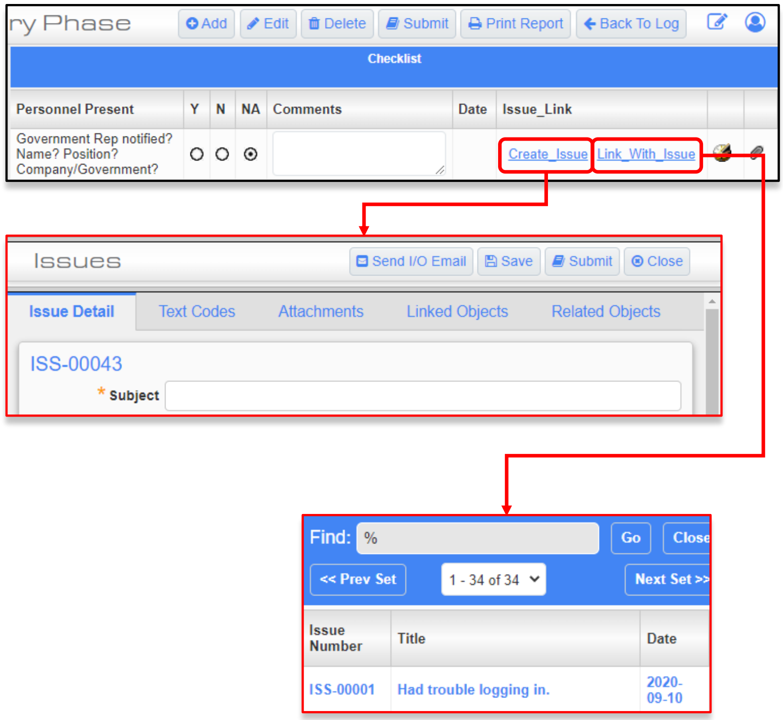
Linking Issues to Checklist Items (All)

Link to existing Issue

1. Click **Link Issue**
2. Browse to and select Issue

Link to a new Issue

1. Click **Create Issue**
2. Complete new Issue form
3. Click **Save** Button to save without submitting
4. Add attachments / linked objects / related objects
5. Click **Submit** button to submit the Issue

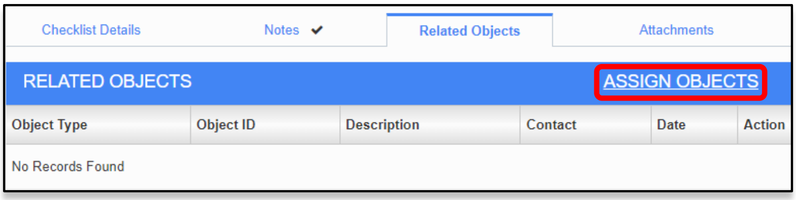


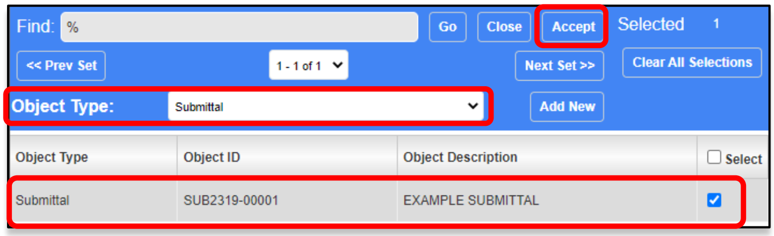
- Linking a Checklist to an Issue line item is very simple. But eCMS gives you the additional ability to create an Issue directly from the Checklist screen (assuming, of course that your eCMS Role enables you to create Issues).
- To link the Checklist line item to an existing Issue, simply click **Link Issue** to access a common search screen. Browse to the desired Issue and click it to establish the Checklist-Issue link.
- To link the Checklist line item to a <u>new</u> Issue, click **Create Issue.** This opens a new window where you can create a new Issue. Module 4 contains all the information you need to create, save, and submit an Issue.

TRAINEE NOTES

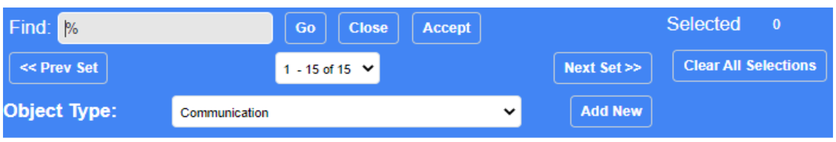
Relating a Checklist to Another eCMS Object (All)

1. Navigate to and open a Checklist
2. Click Related Objects tab
3. Click **ASSIGN OBJECTS**
4. Select Object Type
5. Locate the desired object 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.
- 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.

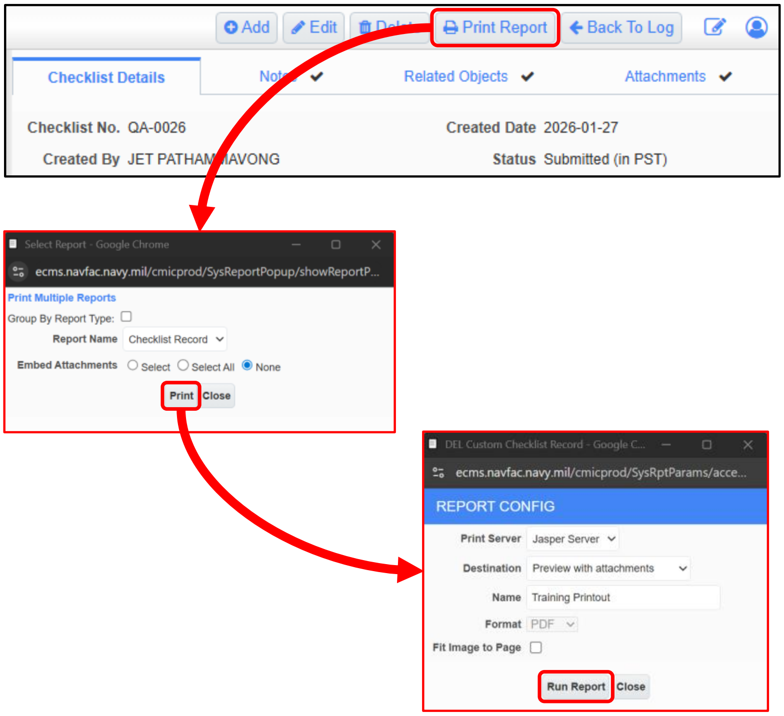


- First, you need to choose the type of object you want to relate to the Checklist.
- Then, you need to find the specific object you want to relate, either by browsing through the list or by searching.
- Finally, after choosing the desired object, you need to click a button (Accept) that is not located intuitively.
- Note that if necessary, you can relate multiple objects to the Checklist at once.

TRAINEE NOTES

Printing a Checklist (All)

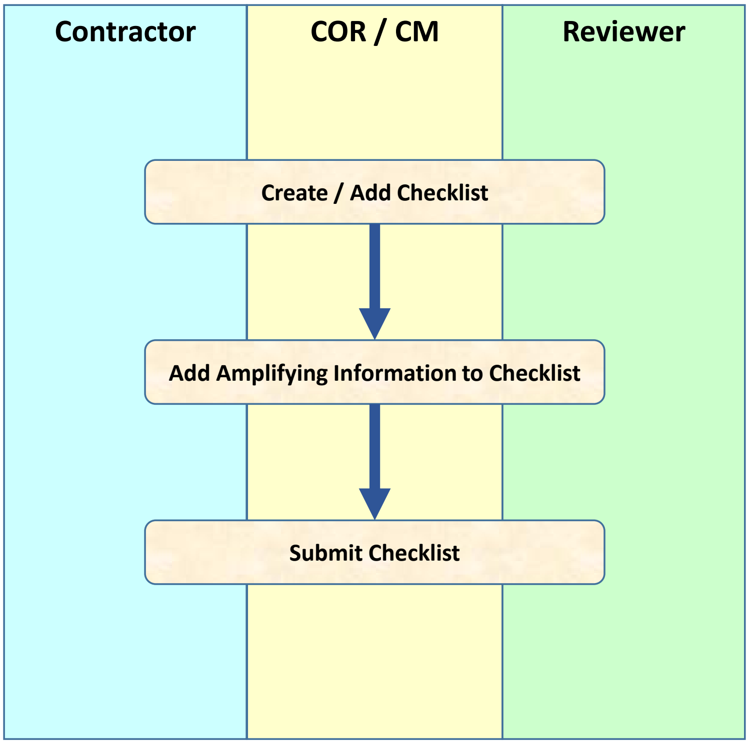
1. Navigate to and open Checklist record
2. Click **Print Report** button to launch the Select Report screen
3. Complete report details and select **Print** to launch the Report Config screen
4. Select **Run Report**



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

TRAINEE NOTES

Checklist Workflow Recap (All)



TRAINEE NOTES

Summary

- Why Checklists?
  - Easy-to-complete forms
  - Ensure nothing is missed when performing an activity
  - Document completion or status for an activity
- Checklists in eCMS
  - Some map to existing processes (e.g., “3 Phases of Work” or “Red Zone”)
  - Some capture data used for other purposes (e.g., KPI Checklist)
  - Some capture important data that you “just don’t want to forget” (e.g., CPARS Checklist)

- You can add attachments and notes to a Checklist as a whole or to a Checklist item.

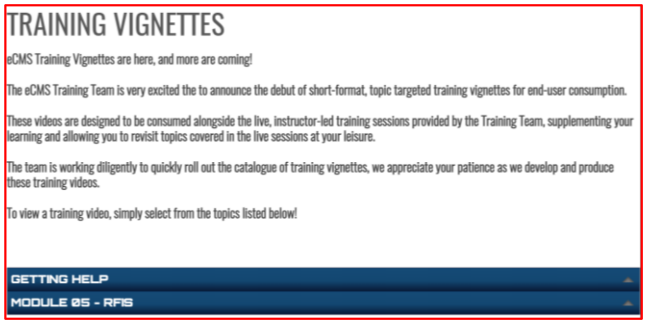
TRAINEE NOTES

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

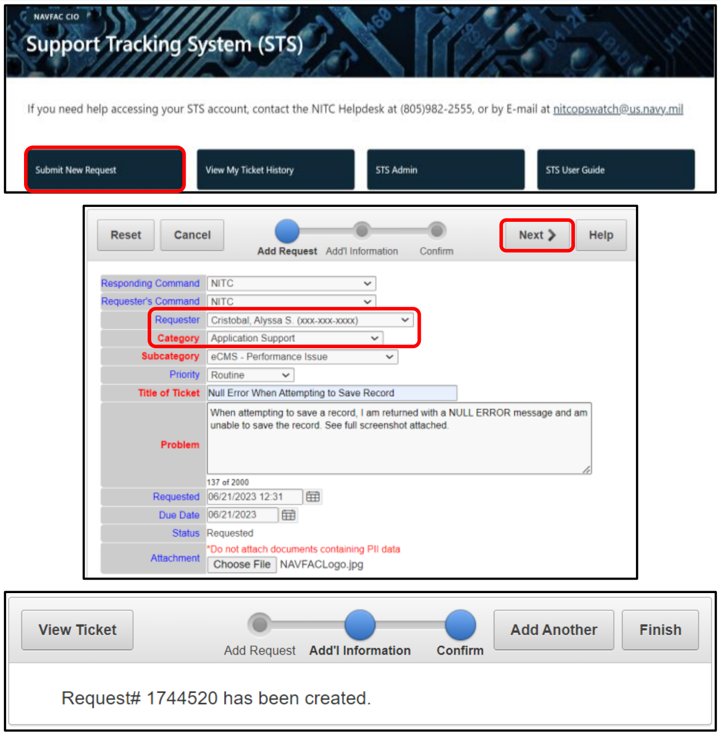
Requesting eCMS Help (All)

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

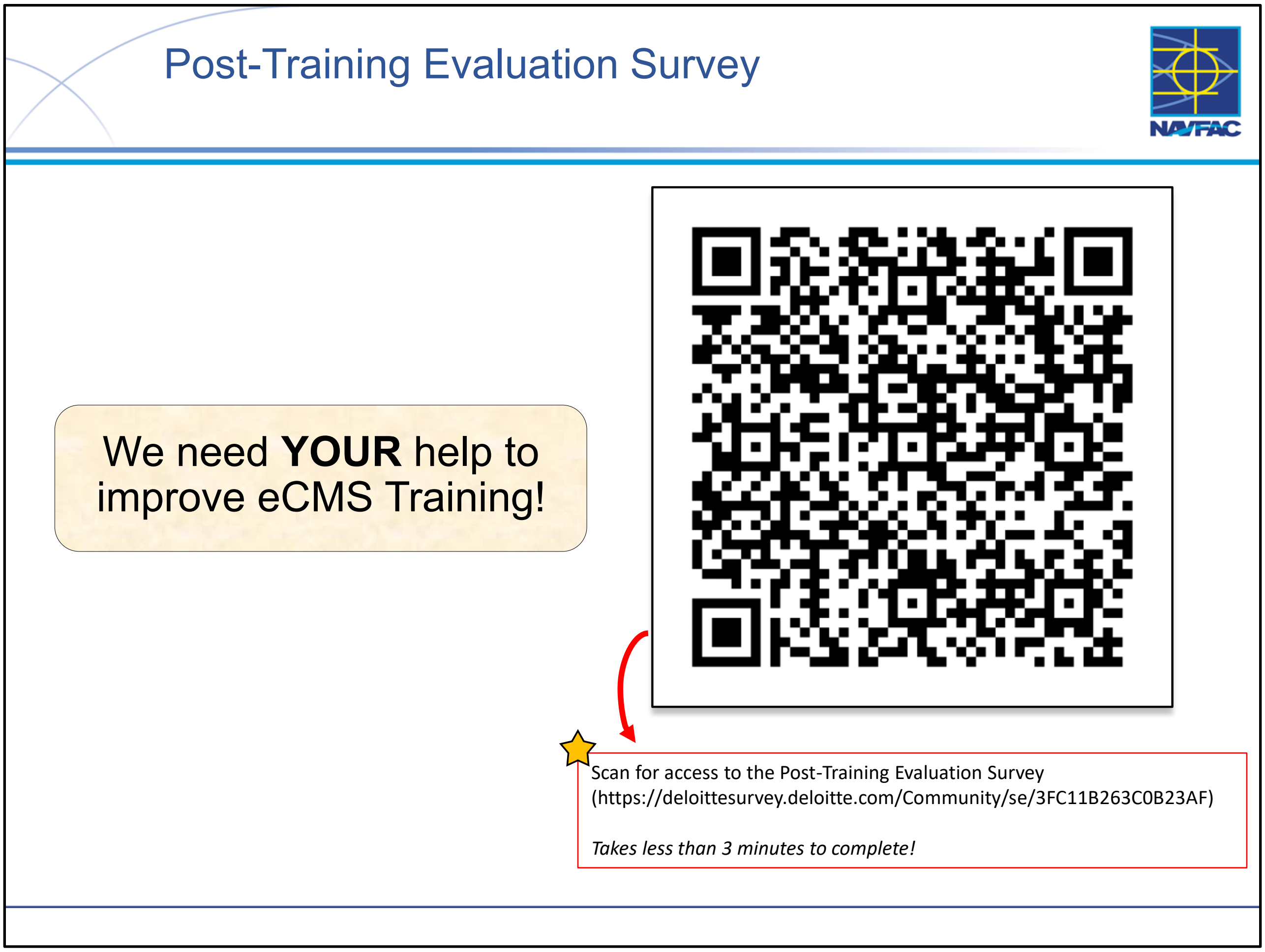
KTR Users

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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