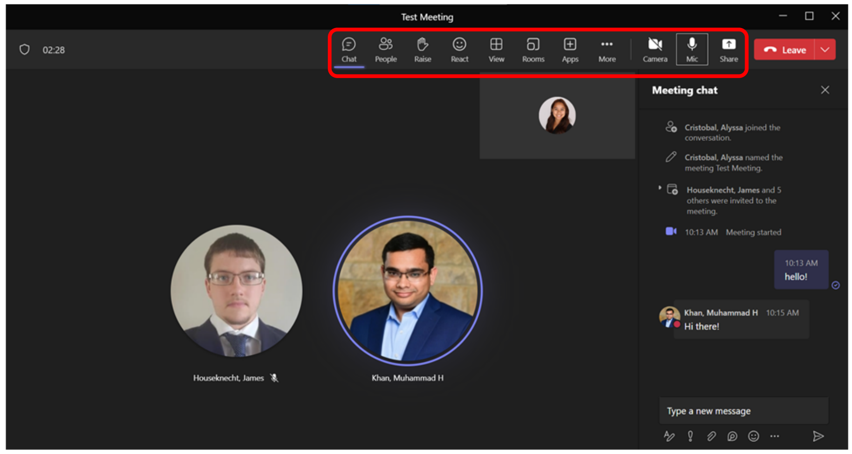
Teams Meeting Controls (All)

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 14: Punch Lists

This module includes the following topics:

- Introduction
- Punch List Workflow
- Creating a Punch List Item
- Assigning a Punch List Item to Reviewers
- Building a Reviewer Table Using Reviewer Template
- Tracking and Editing a Punch List Item
- Receiving and Responding to a Punch List Item
- Closing a Punch List Item
- Filtering and Pivoting the Punch List Record Log
- Editing Punch List Items from the Record Log
- Printing a Punch List Item
- Punch List 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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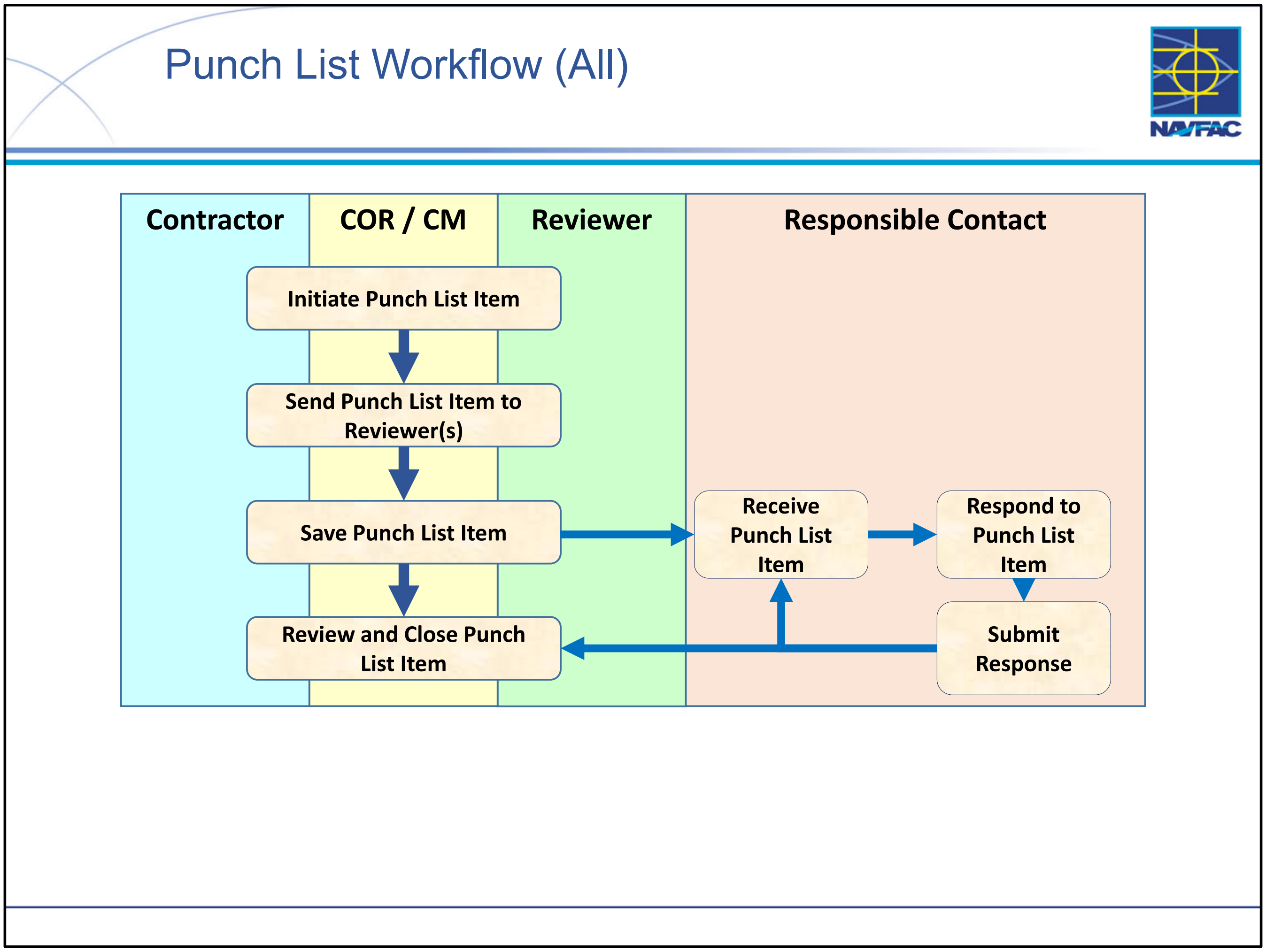
Introduction (All)

- eCMS Punch Lists is a LIST program
  - Punch List Program can be used for Punch Lists, but also for other use cases (e.g., red zone)
- Documents completion or status for an activity
- Users can assign multiple reviewers the same Punch List item
- Can be created or edited by any role (COR, REV, KTR, etc.)
- Assigned items tracked on My Actions page
- Can be created two ways
  - Through navigation pane (Site Management → Punch Lists)
  - Through related objects
- Can batch edit from Log
- Future Capabilities:
  - Punch List can be created from OCR Plans
  - Can Import Lists

- Typically, a punch list is a deficiency list at the end of the project, however in eCMS the Punch List module can be used for many uses.
- An example use case could be a Punch List Item being **Rework Items** for an item, **cracked tile deficiency or for tracking actions for Red Zone at the end of the project.**
- Punch List have reviewer tables so routing and actions can be created for each item.
- As with many objects in eCMS, you can create a Punch List Item from "either end." You can either create the Punch List Item directly, or – if you are already in another eCMS record – you can create the Punch List Item using a Related Object
- One reason why Punch Lists are so powerful is that they can be created by most-project roles including the GOV and KTR.
- **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

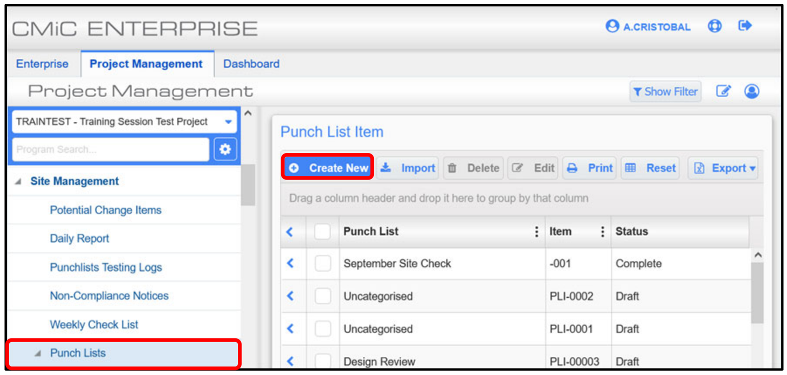


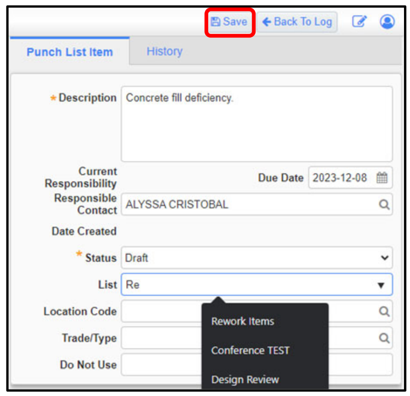
- The swim lane diagram presents a high-level representation of the Punch List process in eCMS.
- The Punch List program applies to every role, and a user can assign multiple reviewers to a Punch List Item.

TRAINEE NOTES

Creating a Punch List Item (All)

1. Navigate to Punch Lists
2. Click **Create New** button
3. Complete Punch List Item Details Form
4. Add Reviewers in the Reviewer Table (if applicable)
5. Click **SAVE** button
6. Add attachments if required



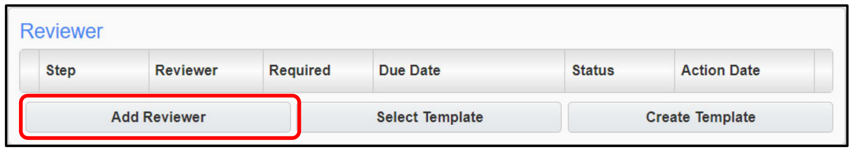


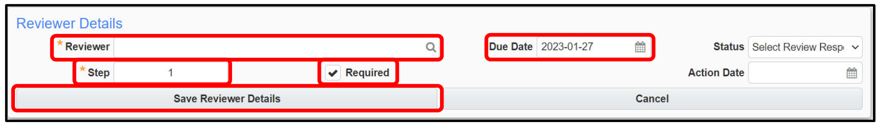
- Adding a new Punch List Item is a very straightforward process. Important fields to populate are:
  - **Description** - Enter a title and full description for the Punch List Item.
  - **Due Date** - Enter/select the due date for the Punch List Item.
  - **Responsible Contact** - Enter/select the individual responsible for completing the Punch List Item.
    - The user assigned to the Responsible Contact field will populate as the first Reviewer in the Reviewer Table (populate the Reviewer Table will be covered later in this module).
  - **List** - Create or select a list to which to add the item from the drop-down menu or create a new list by typing the name in this field. Entering a new name in the List field will create a list name for the project. Suggested lists include Deficiency Rework Items, Red Zone, QC Rework, Pre-Final Walkthrough, Design Review as examples.
    - If a List is not entered or chosen, it will default to Uncategorized.
  - **Location Code** - Enter the code for the project area you designate.
  - **Trade/Type** - Enter/select the trade code for the type of work involved in the Punch List Item.
- Complete as many of the User Defined fields as possible – this will help the Responsible Contact process the Punch List Item faster.
- Once a Punch List Item is saved, the Status will update to OPEN.
- You can add additional attachments / notes at any time after you have saved the Punch List Item.

TRAINEE NOTES

Assigning a Punch List Item to Reviewers (All)

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





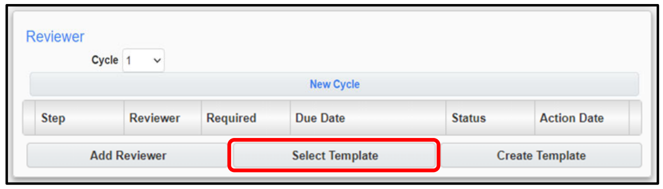
7. For each reviewer, confirm:
   - Step (sequential or parallel)
   - Due Date
   - Check Required
8. Click **Save Reviewer Details** button

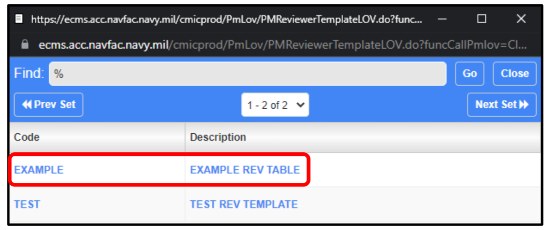
- In the reviewer section, REV or COR roles can assign the Punch List Item to Reviewers by creating a Reviewer Table.
  - The user assigned to the Responsible Contact field will populate as the first reviewer in the Reviewer Table.
  - Additionally, KTR’s only have the Add Reviewer button allowing them to interact with the Reviewer Table. The COR should discuss who and when KTR’s should add reviewers at the PAK/Partnering Meeting.
- 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 Step field determines the order in which the Punch List Item will be routed to reviewers. Lowest number will be first, highest number will be last. To route a Punch List Item to multiple reviewers in parallel, edit the Step field and assign all parallel reviewers with the same Step number.

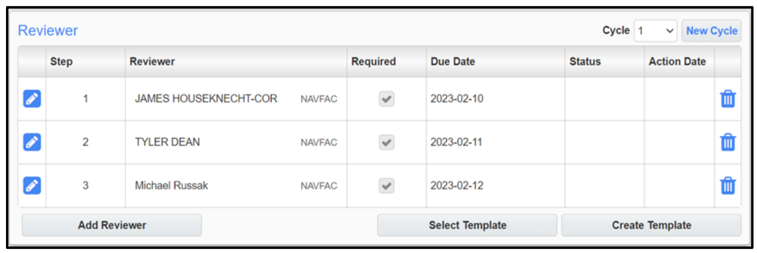
TRAINEE NOTES

Building a Reviewer Table Using Reviewer Template (NAVFAC Users)

1. Navigate to and open a Punch List Item
2. Click **Edit** button
3. In Reviewer section, click **Select Template** Search for and add reviewers
4. Select Reviewer Template by Name





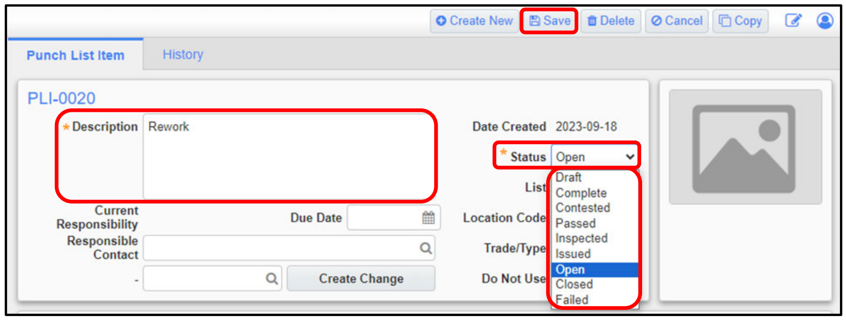


- When populating Punch List Items throughout the lifecycle of your project, you may find yourself adding the same set of Reviewers, in the same order. While you can continue to add these reviewers on at a time, you also have the option to create a **Reviewer Template**.
- A **Reviewer Template** will 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.
- Creating a **Reviewer Template** is a very straightforward process. The Punch List Item 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 Punch List Items
  - 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

Tracking and Editing a Punch List Item (All)

1. Locate and open Punch List Item
2. Add Attachments and Review Material
3. Update **Status**
4. Click **Edit**
5. Add **Notes**
6. Click **Save**

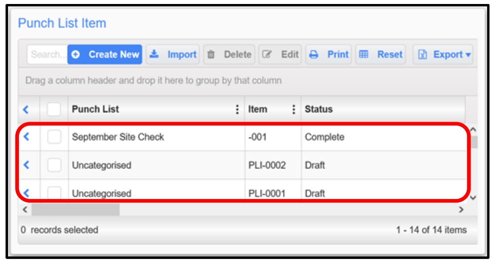


- Tracking and editing Punch List Items in eCMS is a very straightforward process:
  - Navigate to the Punch List Item and open it.
  - Add any Attachments/Notes if necessary.
  - Update Status, Description information, and Reviewer Table as necessary.
- When adding a Note, the User has the option to make the note Public or Private.
  - **Public** – Anyone can view this note.
  - **Private** – Visibility of this note is limited to internal employees.
- If you have multiple Attachments and your note refers to only one of them, you can use the Reference Attachments button to explicitly identify the Attachment(s) that your note is in reference to.
- **NOTE:** All Notes should be public, any Notes (Private or Public) created by KTRs will be visible by all parties.

TRAINEE NOTES

Receiving and Responding to a Punch List Item (All)

1. Navigate to and open Punch List Item
2. Review content and (if applicable) 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 Punch List Item to the next Reviewer in the table

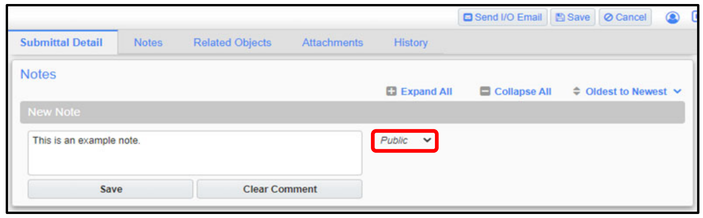


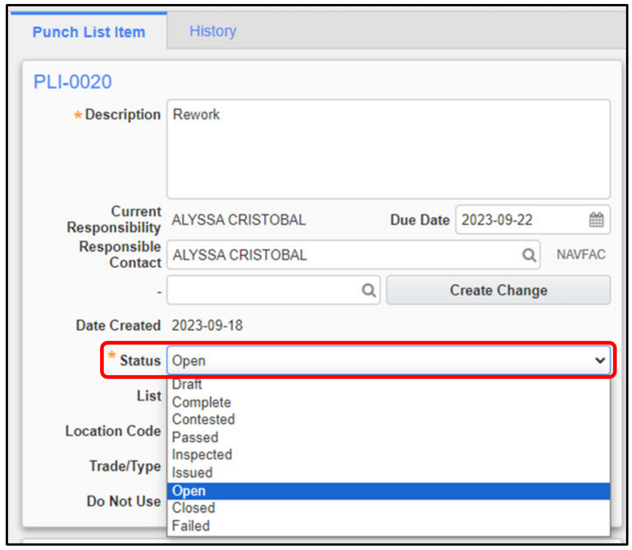
- When notified that a Punch List Item is "in your court" for action (through a routine eCMS notification, through an explicit I/O eMail, or through a review of your Action Items Dashboard), you can open and complete your response of the Item.
- Locate and open the Punch List Item – Note the banner at the top of the Punch List Item Details screen.
- THOROUGHLY review the Punch List Item, 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 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.
- Choose the appropriate response "Completed; Contested"
  - If Reviewer chooses "Contested" and identifies reasons for response, update attachment and notes with corrected items. Choose New Cycle if another review is required.

TRAINEE NOTES

Closing a Punch List Item (All)

1. Navigate to and open Punch List Item
2. Click **Edit** button
3. Select a relevant **Status**
4. Add final remarks in **Notes** section
5. Click **Save** button





- When closing a Punch List Item, a user will select a relevant status to the closure of the Punch List Item.
- Enter any final remarks as a Note. Remember that private Notes are not visible to the Contractor, but Public Notes are visible to the Contractor.
- If a user wants to 'reopen' a Punch List Item, they should update the Status to OPEN.
- Unlike Submittals, where a rejected Submittal requires a new Submittal Record to be submitted with the Record Identifier edited, Punch List Items should go through new Reviewer Cycles when the Status of the Item is Failed.

TRAINEE NOTES

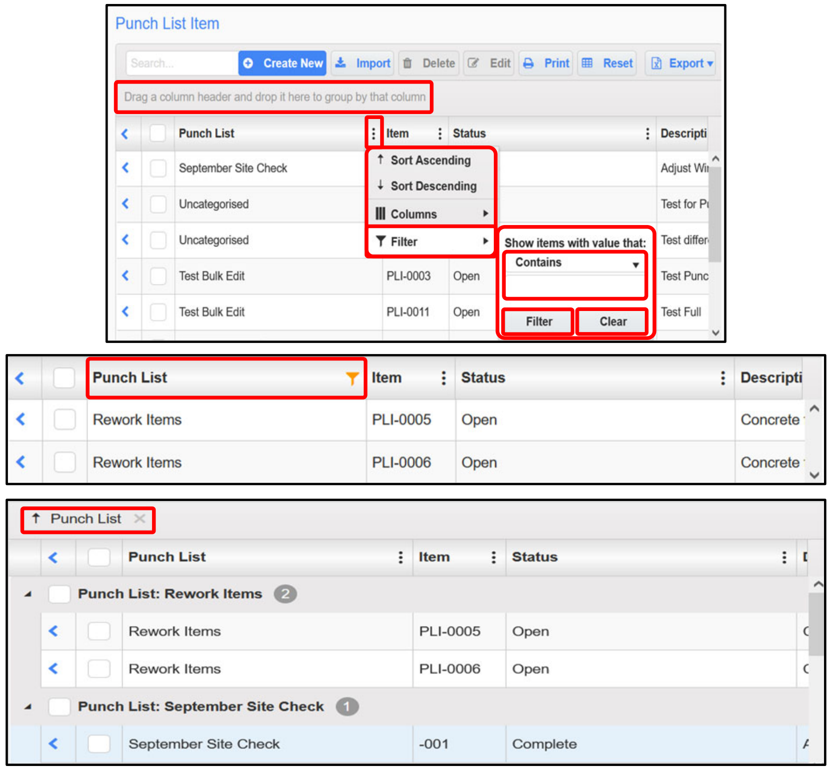
Filtering and Pivoting the Punch List Record Log (All)

Filtering

1. Click ellipses in any column to filter by that column
2. Select **Filter** to open filter dialog box
3. Enter filter criteria and click **Filter**
4. To clear the filter, use the same process (1-4) and click **Clear**

Pivoting

1. Drag a column header and drop it above the record log to group by that column

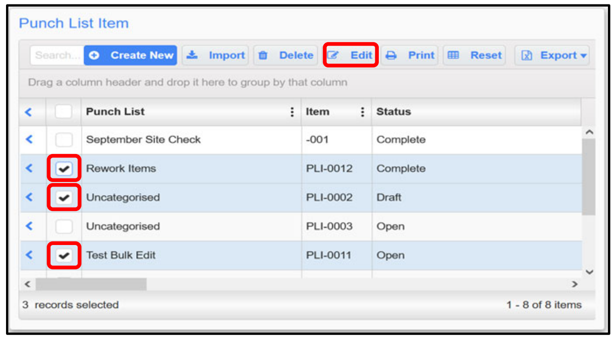


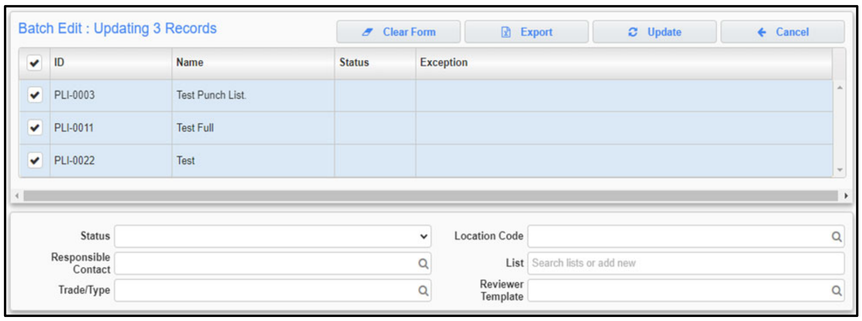
- A very large project may have hundreds of records and it could be very time consuming to scroll to the one you want. Filtering is a method of searching for a specific record. Filtering is especially useful when tracking Punch Lists because you can view all the records associated to one Punch List at a time:
  - Navigate to the Punch Lists
  - Click the ellipses in the first column "Punch List" to filter by List
  - Select **Filter** to open the filter dialog box
  - Enter filter criteria and click **Filter**
  - To clear the filter, use the same process as above and click **Clear**
- You can filter on multiple columns at the same time to really "drill down" to your desired record set quickly.
- **LESSON LEARNED**: ALWAYS clear your filters when you are done with them. Filters are PERSISTENT, which means that they remain until you explicitly clear them. If you have a filter applied and either navigate somewhere else or log out and log back in again, the filter will still be applied and you may not see the expected results (or anything at all for that matter). If you have filtered on multiple columns, you must clear each filter separately
- Pivoting a Punch List Record Log is useful for grouping your log by Punch List. This essentially organizes your Log by categorization of the column header.
  - Navigate to the Punch Lists
  - Drag the column header "Punch List" to group by Punch List
  - To clear the Pivot filter, click the **X**

TRAINEE NOTES

Editing Punch List Items from the Record Log (All)

1. Navigate to Punch Lists
2. Select record(s) to edit
3. Click **Edit**
4. Complete Batch Edit Form
5. Click **Update**



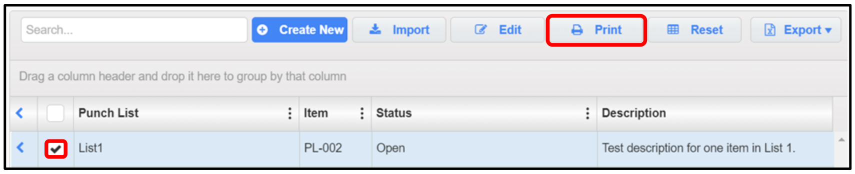


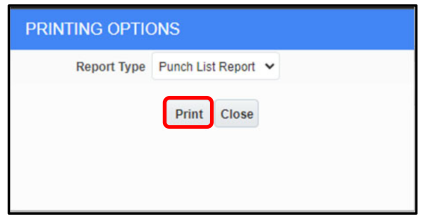
- The **Edit** feature on a Punch List Log allows a user to batch update multiple records at once.
- The **Edit** button will be greyed out until records are selected in the Log. After you have selected the record(s) you would like to update, click the **Edit** button.
- Fields you can **Batch Edit** are:
  - Status
  - Responsible Contact
  - Trade/Type
  - Location Code
  - List
  - Reviewer Template
- Click **Clear Form** to clear out the fields prior to updating.
- **Export** will export a .xlsx format of the metadata from the log of record(s) you are updating.

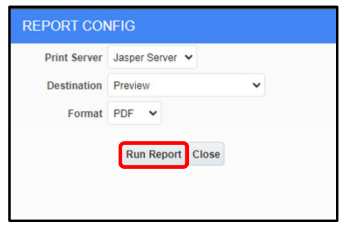
TRAINEE NOTES

Printing a Punch List Item (All)

1. Navigate to the Punch List Log
2. Select the Punch List Item you would like to Print
3. Click **Print**
4. Click **Print** again
5. Click **Run Report**

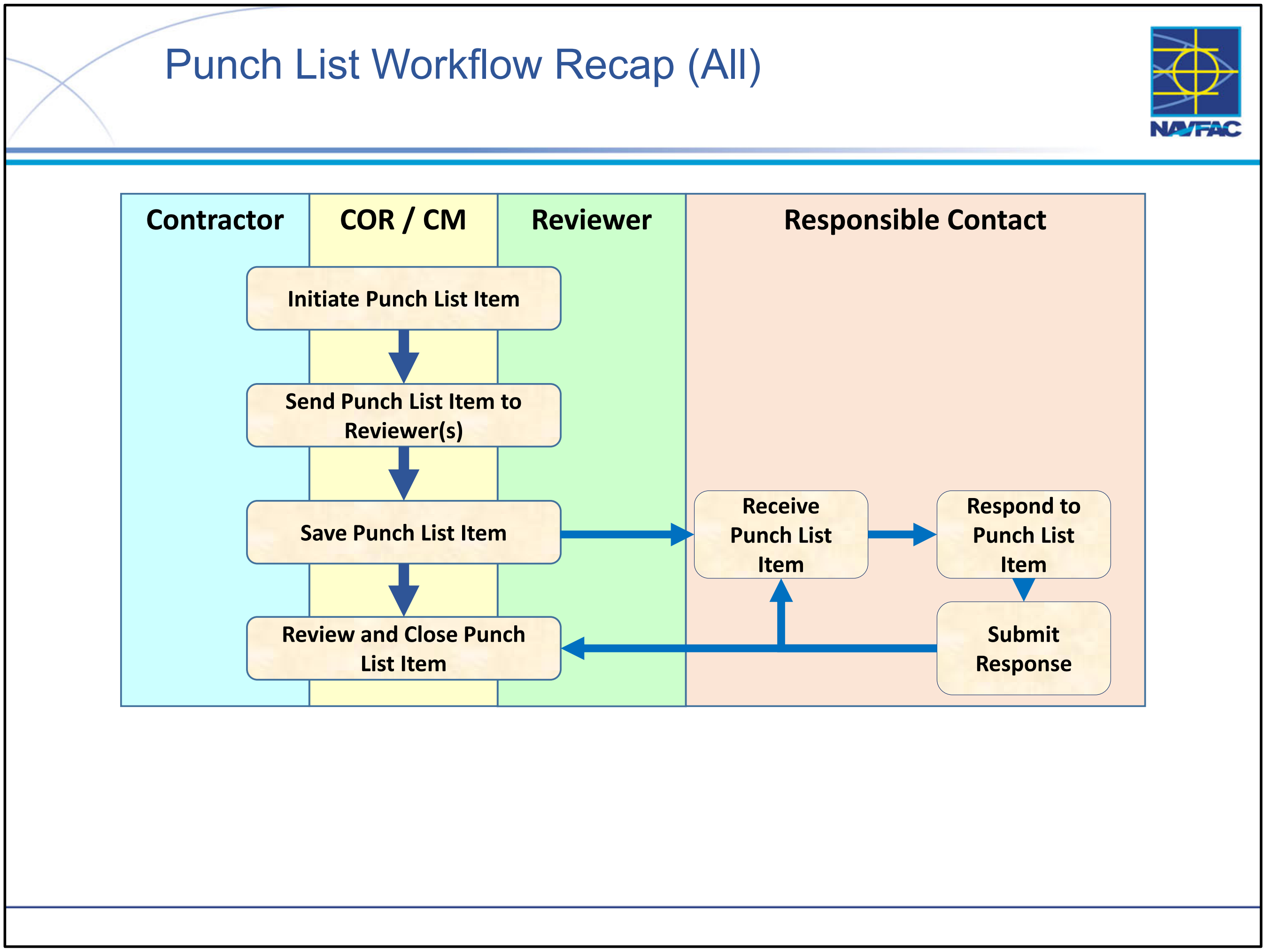






- Printing a Punch List is very simple and can be done in the record log with the **Print** button.
  - Navigate to the Punch List Record log
  - Select the Punch List Item you would like to Print
  - Click **Print**
  - Click **Print** again
  - On the Report Config window, ensure it is configured as shown above, then 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 Save or Print a PDF from within your browser.
- Ensure that the browser being used is not blocking pop-ups from eCMS.
- **LESSON LEARNED:** If you want to save the file as a PDF to your computer, select **Microsoft Print to PDF** as your printer. This works <u>much</u> better than the **Adobe PDF** printer.

TRAINEE NOTES



- The swim lane diagram presents a high-level representation of the Punch List process in eCMS.
- The Punch List program applies to every role, and a user can assign multiple reviewers to a Punch List item.

TRAINEE NOTES

Summary

- Punch List Items can be created by just about anyone
- The Punch List screen enable you to both create a new Punch Lists and to manage existing Punch List Items throughout their lifecycle
- Essential to tracking activities
- Multiple reviewers can be assigned to the same Punch List item
- Assigned items can be tracked on My Actions page
- Can be created two ways
  - Through navigation pane (Site Management → Punch Lists)
  - Through related objects

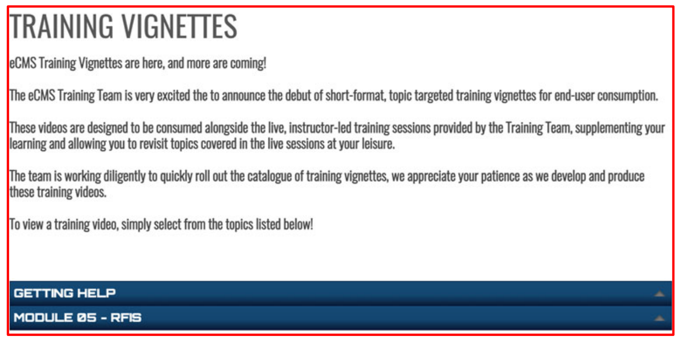
TRAINEE NOTES

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

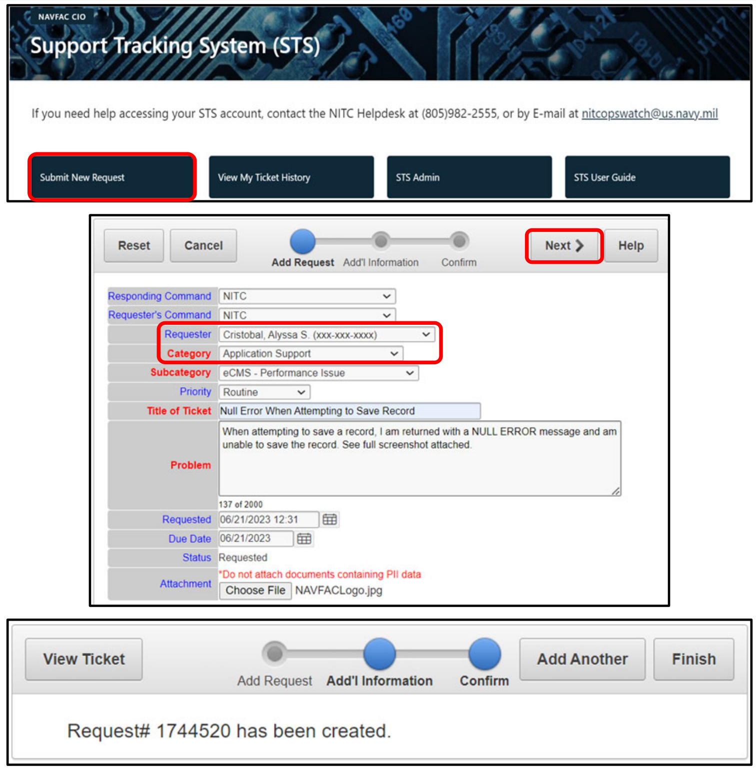
Requesting eCMS Help (All)

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

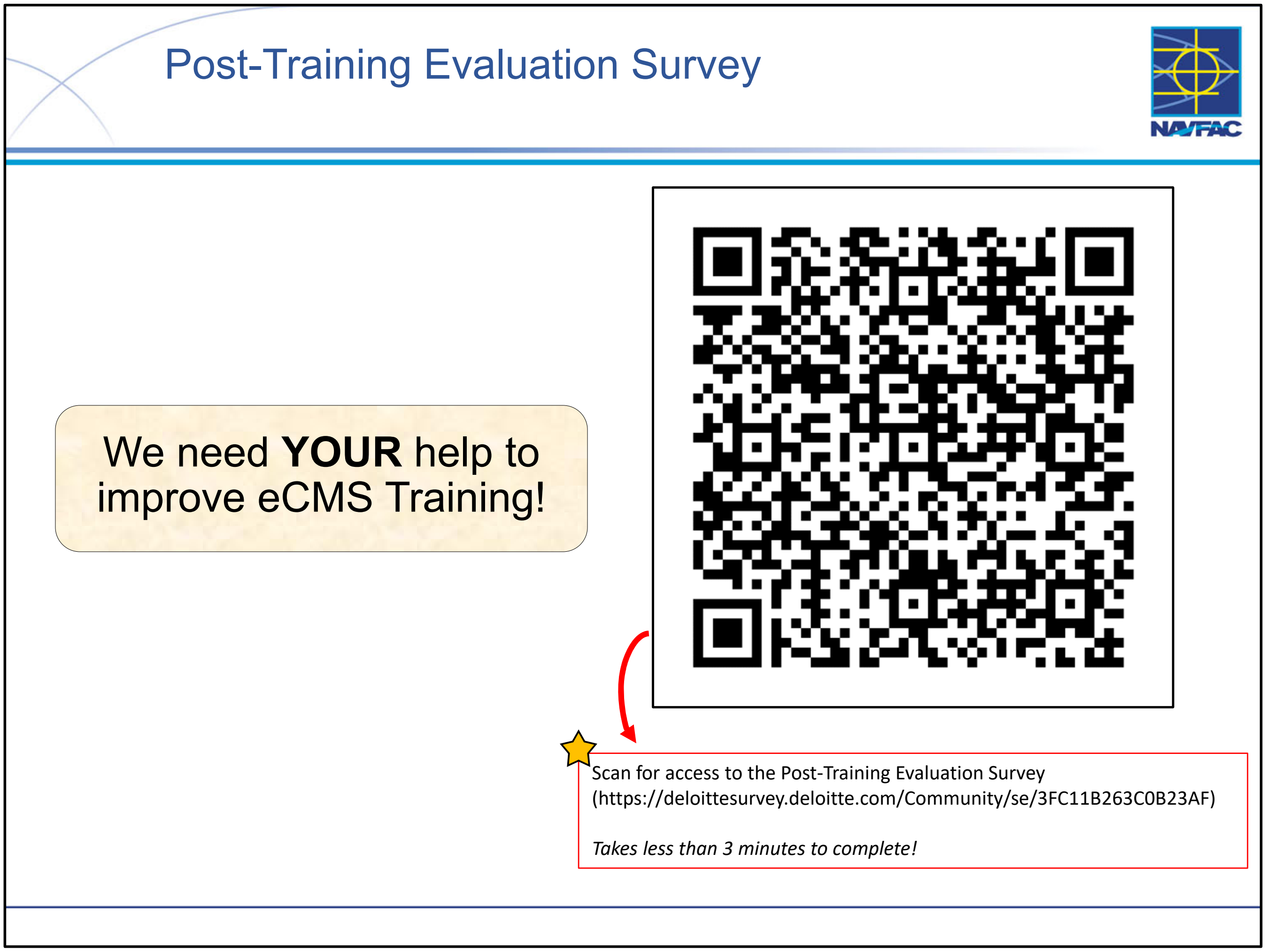
KTR Users

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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