



# eCMS Processes and Procedures

## NAVFAC Users

Updated January 2019

Prepared by CACI International, Inc.



**Cover Photo**

140806-N-PA772-001 JACKSONVILLE, Fla. (Aug. 6, 2014) U.S. Navy photo by Earl Bittner/Released

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# 1. GETTING STARTED

## 1.1. Purpose and Background

NAVFAC is developing an Electronic Construction and Facility Support Contract Management System (eCMS). This effort will streamline complex processes; use best practices and techniques to manage costs, schedules, execution efficiency; and deliver services that fully meet the Command's readiness requirements. This manual serves as a reference for NAVFAC Users.

### eCMS will offer:

- A localized platform to submit, review, and respond to Requests for Information (RFIs) and Submittals for NAVFAC Construction and NAVFAC Facilities Support Contracts (FSC)
- An easy system to track project management and team members
- A place to store documents and files related to an RFI or Submittal
- A list of Action Items and a Calendar to help team members stay organized
- A system to capture the communications, decisions, and information related to the lifecycle of a project

eCMS will be used by both NAVFAC personnel and contractors.

### 1.1.1 UFGS Section 01 31 23.13 20

UFGS Section 01 31 23.13 20 "Electronic Construction and Facility Support Contract Management System" covers the requirements for the Navy use of NAVFAC's web-based eCMS. It establishes that "eCMS is the designated means of transferring technical documents between the Contractor and the Government." Further, "the Contractor will be provided access to eCMS," and "Project roles and system roles will be established to control each user's menu, application, and software privileges..." Refer to Section 01 31 23.13 20 for further requirements regarding the use on eCMS.

## 1.2. Users

### 1.2.1 Active and Passive Users

Different users will have different permissions and responsibilities within the eCMS System. NAVFAC Users and Contractors will have different screens. NAVFAC will have active users and passive users. **Active Users** are actively working on the project. **Passive Users** will have read-only access.



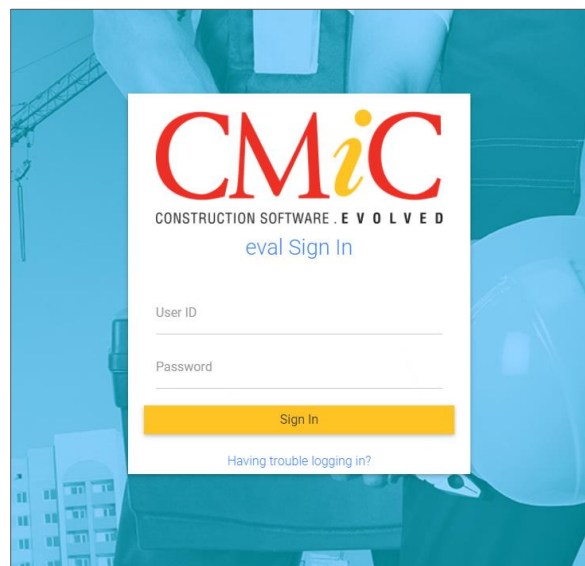
## 1.2.2 Logging In

For project team members that do not yet have access to eCMS, the GOV Contracting Officer's Representative (COR) or Construction Manager (CM) must request access through the use of the Project Access Request Form found on the internal NAVFAC Portal:

[https://hub.navfac.navy.mil/webcenter/faces/oracle/webcenter/page/scopedMD/s42a90a51\\_7a8d\\_496e\\_ac68\\_f103d7ef63a6/Page601.jspx?\\_afLoop=486585411355216#!%40%40%3F\\_afLoop%3D486585411355216%26\\_adf.ctrl-state%3Dlvc68nj1h\\_45](https://hub.navfac.navy.mil/webcenter/faces/oracle/webcenter/page/scopedMD/s42a90a51_7a8d_496e_ac68_f103d7ef63a6/Page601.jspx?_afLoop=486585411355216#!%40%40%3F_afLoop%3D486585411355216%26_adf.ctrl-state%3Dlvc68nj1h_45)

The minimum information required is First Name, Last Name, E-Mail Address, Project Role, and Phone Number (if available). Any personnel additions, deletions, or changes throughout the project will require a resubmission of the list for GOV approval. A System Administrator will provide all users with a URL, User Name, and Temporary Password for initial access to eCMS.

When visiting the URL that has been provided to access eCMS, a login screen will appear.



Type your User Name and Password in the blank fields and click the yellow **Sign In** button. This will open the home screen of the system.



CMiC FIELD		
Project: NAVFAC Test Project (NAVTEST)		
<ul style="list-style-type: none"> <li>Dashboard</li> <li>Communication Management</li> <li>Site Management</li> <li>Document Management</li> <li>Reports</li> <li>Wide Area Workflow (WAWF)</li> <li>Contractor Performance Assessment</li> <li>eCMS Access Request Form</li> <li>eCMS (Internal)</li> <li>HFACMAN</li> <li>eCMS Registration Site</li> </ul>	MY ACTIONS	
	NAVFAC Test Project	
	ITEMS	GROUP BY TYPE
	<ul style="list-style-type: none"> <li>Overdue (5)</li> <li>Today (3)</li> <li>Tomorrow (3)</li> <li>No Actions</li> <li>This Week (3)</li> <li>No Actions</li> <li>Following Week (3)</li> <li>Next 30 Days (4)</li> </ul>	
	2018-09-12	Request For Information 00047
	2018-09-12	Request For Information 00048
	2018-09-13	Request For Information 00049
	2018-09-25	Request For Information 00050
	2018-09-30	Transmittal ARCENGB1-00013
	2018-09-30	Transmittal 22-ACME-00017
	2018-09-30	Transmittal ARCENGB1-00009

### 1.2.2.1 Changing Password

Upon first login, please change your password immediately. To do this, please refer to **1.2.2.2 System Contact Info**.

If you have forgotten your password, click the **Having trouble logging in?** on the login screen.



Then, enter your e-mail address in the textbox, and click **Reset Password**.



You will receive an e-mail from [accounts@cmic.ca](mailto:accounts@cmic.ca) with the link to change your password. Click on the link, enter your User ID and new password and click on **Change Password** button.



The DOD password standards are as follows:

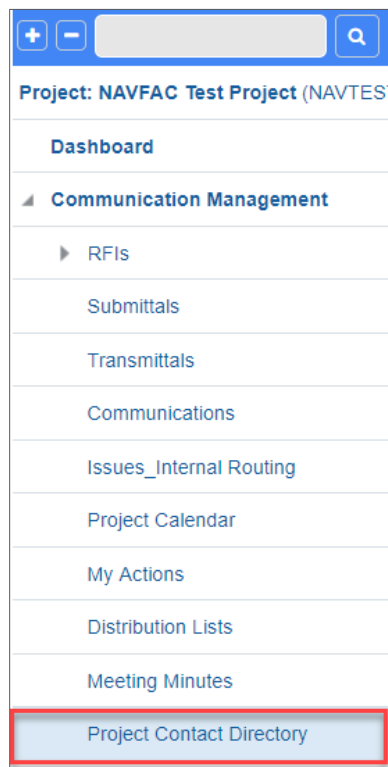
Must be at least 14 characters in length.

- Must contain at least:
  - Two uppercase letters [A-Z]
  - Two lowercase letters [a-z]
  - Two digits [0-9]
  - Two special characters [e.g.: !@#\$%\*]

- A new password should differ from the changed password by at least 4 characters.
- A password cannot contain your network account name, username or display name.
- A password cannot be changed to any of the most recent 24 passwords.
- Must be changed no less frequently than every 60 days.
- Cannot be changed more frequently than once per day.

#### **1.2.2.2 System Contact Info**


Each user will have an individual profile created prior to their first login to eCMS. To add to or change your profile, including your password, go to the Navigation Pane on the left column of the screen and open the **Communication Management** folder (If you do not see this folder, please refer to **Section 1.3.1 Navigation Pane.**) Click **Project Contact Directory**.



This will open a screen with contact information for everyone on the project team. Scroll to your name and click on the name under the **Contact Name** column.

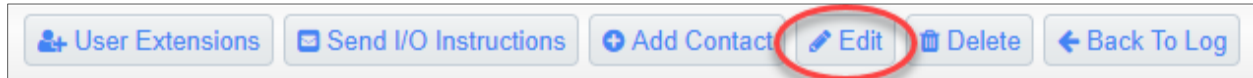
PROJECT CONTACT DIRECTORY			
Contact Code	Contact Name	Email	Phone
AE	Architectural Engineer		
BS	Bob Smith		
GC	Government Cor		
NU	NAVFAC User		
Total (9 rows)			

This will open your User Profile for the project. At the bottom of your record is a **User ID** field. Click the **pencil icon** next to this field to change your password.

CONTACT INFORMATION	
Work Phone	Preferred Contact Method
Home Phone	2nd E-mail
Mobile	Pager
Main Fax	Web Page
2nd Fax	Other Info
Use Alternate Fax Method <input type="checkbox"/>	Fax Prefix
Fax Suffix	
<p>  User ID BOB.SMITH         </p>	

A popup box will open with the option to change the password. Click on the **pencil icon** next to the password field. Change and confirm your new password and click the **Save** button.

If you need to update any other part of your User Profile, select the **Edit** button from the top, right corner of the screen.



This will open the form for changes. Once all updates have been made, click **Save**. If you want the address and contact information applied to all of your projects, click the **Apply to Projects** button.



### 1.2.2.3 E-mail Notifications

eCMS allows users to set their notification preferences to receive e-mails when information or changes are added to the system. To do this, start from your User Profile screen in the Project Contact Directory. To edit e-mail notification settings, select the e-mail notifications tab.

User Profile													
E-mail Notifications													
Object Description	To				CC				All				
	New	Mod	Note	Att	New	Mod	Note	Att	New	Mod	Note	Att	
Communication	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	
Daily Report		<input type="checkbox"/>											
Field Work Directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Issue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Punch List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Request For Information	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Submittal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Transmittal	<input type="checkbox"/>				<input type="checkbox"/>				<input type="checkbox"/>				

On this screen, you will see three columns at the top for To, CC, and All. These represent your role in one of the fields listed under the Object Description column, such as Communications, Daily Reports, or Requests for Information. Under each column, there are boxes next to each object description field. For example, under the “To” column, if you check the box under New for Notice, you will receive an e-mail notification whenever a Notice is created where you are listed as the recipient in the “To” column. You also have the option of receiving notifications for changes to fields listed under the object descriptions where you are in the CC distribution or for All changes.

If you want to always receive an e-mail notification when a **Punchlist** is sent to you in eCMS, check the box in the column labeled new under the **To** heading. You would check the **Mod** box

to receive an e-mail every time a modification is made to Punchlists submitted to you. You would check the **Note** box to get an e-mail every time a note is added to a Punchlist in that project, and the **Att** box to receive e-mails when attachments are added to Punchlists. After you have selected your preferences, click the **Save** button in the top, right corner of the screen.

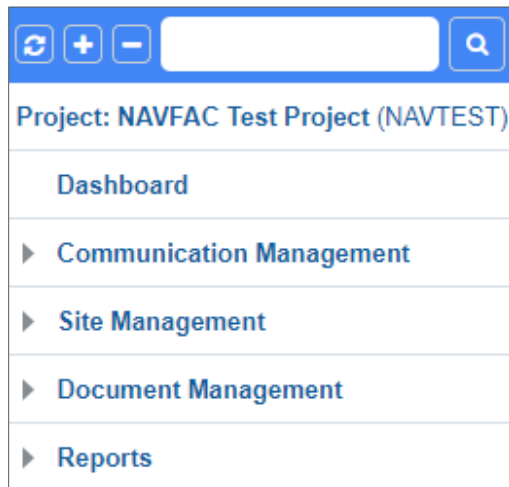
Object Description	To			
	New	Mod	Note	Att
Communication	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
Daily Report		<input type="checkbox"/>		
Field Work Directives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issue	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Punch List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Request For Information	<input type="checkbox"/> <input type="checkbox"/> Ans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Submittal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transmittal	<input type="checkbox"/>			

E-mail notifications must be set for each new project. If you are getting too many notifications, this is also the screen to turn them off.

## 1.3. System Features

### 1.3.1 Navigation Pane

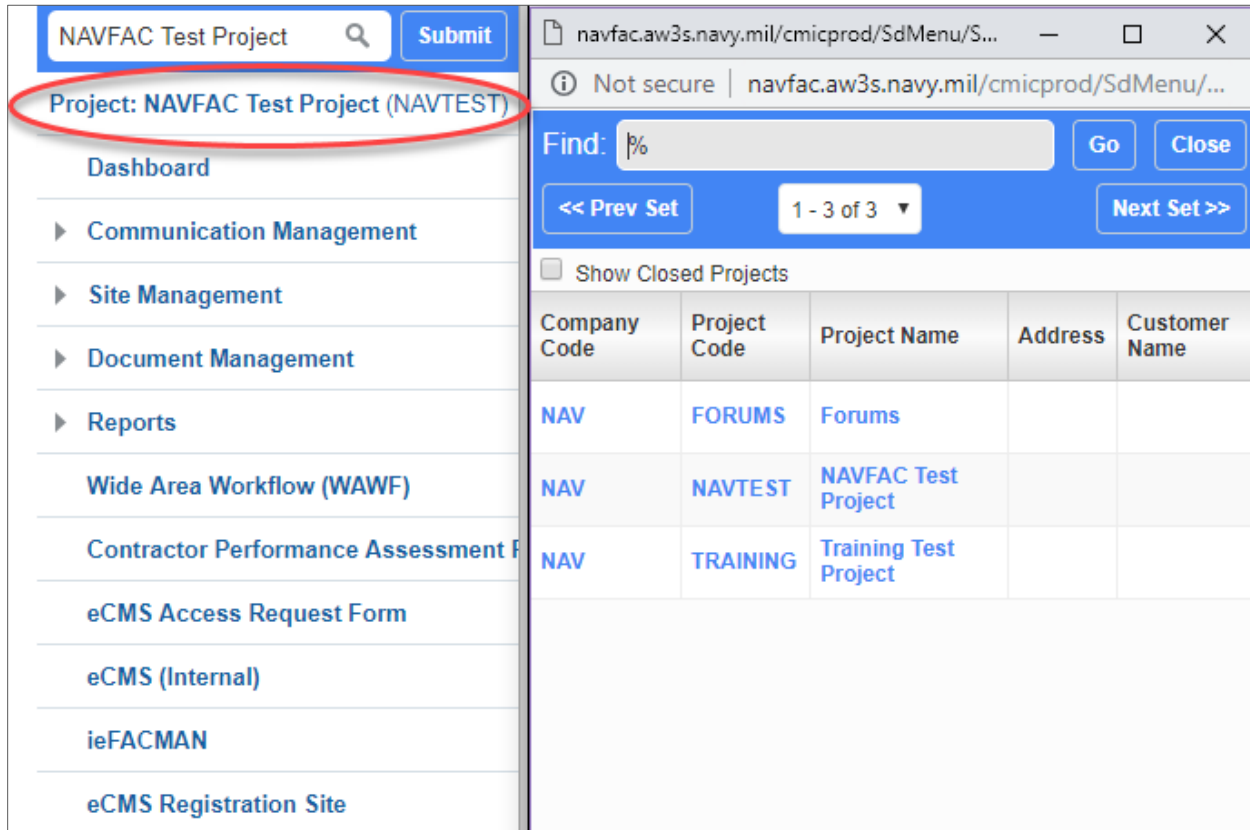
The **Navigation Pane or Treeview** is found on the far left of the screen. The folder structure may vary from project to project.



Click on the gray arrow next to each folder to see the pages for each grouping.

To change project views, click on the name of the project at the top of the menu. This will open a dropdown menu with the last 10 projects viewed by the user. Click the magnifying glass next to this list to open a popup of all projects the user is assigned to.

This will open a popup screen with a list of available projects to view.



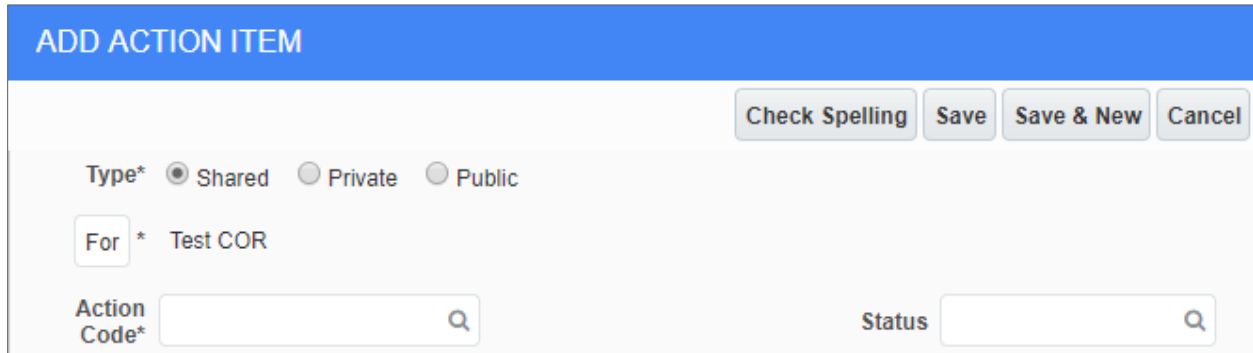
Company Code	Project Code	Project Name	Address	Customer Name
NAV	FORUMS	Forums		
NAV	NAVTEST	NAVFAC Test Project		
NAV	TRAINING	Training Test Project		



### 1.3.2 Required Fields

In each form, there will be fields that are required and fields that offer added information. If the user leaves a required field blank, the user will not be able to submit the form.

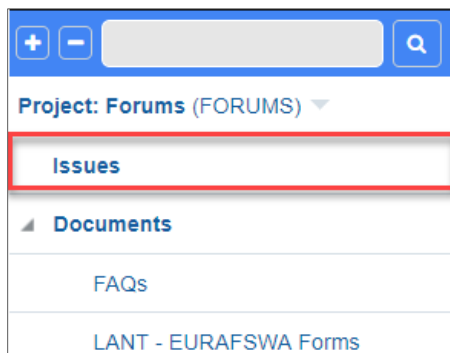
Users can find required fields by looking for the asterisk in the corner next to the label. In the example below, **Type**, **For**, and **Action Code** are required fields. **Status** is not required.



## 1.4. Technical Support and Feedback

If you have questions, concerns, or suggestions to provide to the eCMS User Support Team, navigate to the **Forums** project to submit an **Issue**.

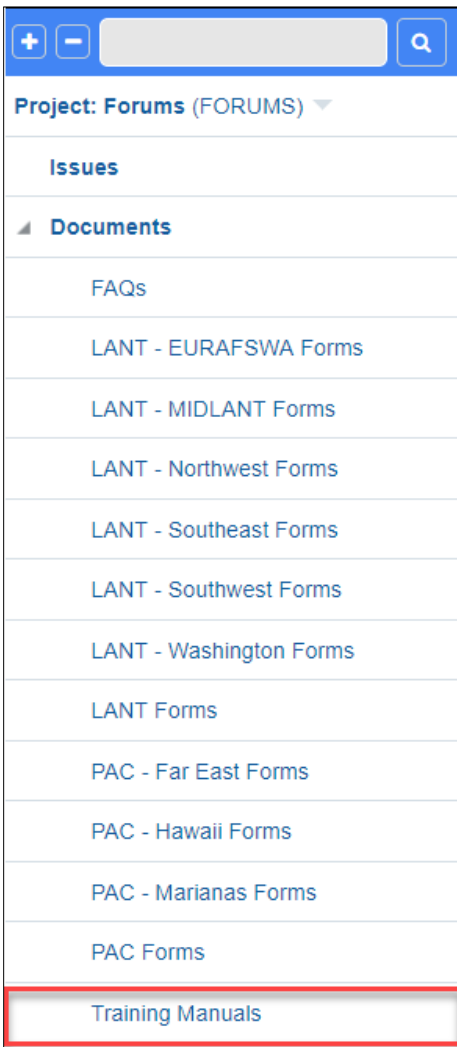
Once logged in, select the current Project at the top of the file tree.



This will open a dropdown list of the last ten projects the user has viewed. To view all of the projects the user is assigned to, select the arrow next to the Search bar at the top of the Navigation Pane. Select **Forums**.

### 1.4.1 Download Training Manuals

After opening the **Forums** project, use the **Navigation Pane** to select **Documents**, and then **Training Manuals**.



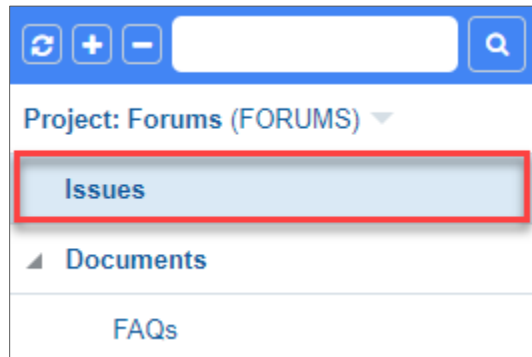
This will open a list of training documents available. Training documents available will include PowerPoint training lessons created to initiate new users, PDF Training Manuals for Contractors and NAVFAC employees, and an assortment of videos on specific lessons within the system. Select a file to view by clicking on the number next to it.

From the Navigation Pane, you can also select the FAQs for cheat sheets on how to resolve Frequently Asked Questions or select the Forms for your region to find frequently used forms.

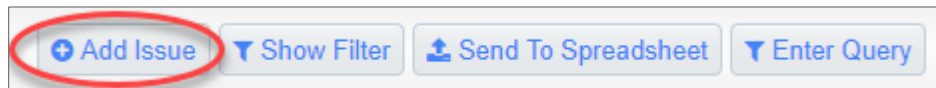
### 1.4.2 Submit an Issue for Help or Feedback

If you are having technical difficulty or would like to offer feedback on either the system or the training manuals, use the Issues application in the **Forums** project.

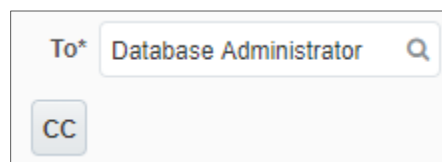
From the **Navigation Pane**, select **Issues**.



From the **Issues** screen, select **Add Issue** from the top, right of the screen.



The **Issue Detail** screen will open. The **From** section will already be completed. In the **To** section, select **Database Administrator**.



Type a Subject, such as "Feedback: Change to Training Manual." If your issue is time-sensitive, select a Due Date to set the deadline; otherwise leave it as is. Select the Severity level of the issue from the dropdown. Next, select the Type of issue, such as Documentation Issue, Question, or Feedback.

In the Description section, explain the issue to the team.

Subject*	Trouble Submitting RFI		
Customer Issue	<input type="text"/>	Severity*	Low ▼
Status*	New ▼	Type*	Feedback ▼
Responsibility	<input type="text"/>		
Description	<input type="text"/>		

Issues will be reviewed in the order in which they are received. NAVFAC strives to respond to all Issues within two working days of receipt.

### 1.4.3 Connectivity Issues and Clearing the Cache

The system was upgraded on Dec 8, 2018 and it is recommended that users clear their browser's history and cache to clear out the old system data from the browser. Over the period, the internet browser holds onto information which can cause issues with logging in and affects the page load time. Hence it is recommended that users clear the browser history, cache, and cookies on a regular basis.

#### Google Chrome

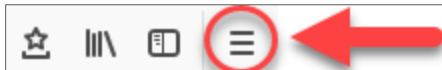
- Click on the Three-Dot menu at the upper right corner.



- Hover over "More Tools".
- Select "Clear browsing data"
- Click on the "Basic" Tab.
- Select all options (*Browsing History, Cookies and other site data, and Cached images and files*).
- Set the "Time range" to *All Time*.
- Click on "Clear data".

#### Firefox

- Click on the Hamburger menu at the upper right corner



- Click on "Options".
- On the left-hand side, select "Privacy & Security".
- Scroll to the History section and click "clear your recent history".
- Select all selection in History section.
- Set the "Time range to clear" to *Everything*.
- Click on "Clear Now".

## Internet Explorer

- Click on the Tools menu at the upper right corner



- Select "Internet options".
- Under the Browsing History section, click the "Delete" button.
- Select all options.
- Click "Delete" and click "OK".

## 1.5. Frequently Asked Questions (FAQs)

*How do I download the PDF attachment on my local drive?*

- To download files from eCMS, please refer to **Section 5.4.2 Downloading Attachments**.

*Who should I contact if I have any questions about the system?*

- Please e-mail eCMS Support at [ecmssupport@caci.com](mailto:ecmssupport@caci.com).

*How do I request access to the system?*

- Only the GOV Contracting Officer's Representative (COR) or Construction Manager (CM) can request access to the system for everyone in the project. The Project Access Request Form can found on the internal NAVFAC Portal:  
[https://hub.navy.mil/webcenter/faces/oracle/webcenter/page/scopedMD/s42a90a51\\_7a8d\\_496e\\_ac68\\_f103d7ef63a6/Page601.jspx?\\_afLoop=486585411355216#!%40%40%3F\\_afLoop%3D486585411355216%26\\_adf.ctrl-state%3Dlvc68nj1h\\_45](https://hub.navy.mil/webcenter/faces/oracle/webcenter/page/scopedMD/s42a90a51_7a8d_496e_ac68_f103d7ef63a6/Page601.jspx?_afLoop=486585411355216#!%40%40%3F_afLoop%3D486585411355216%26_adf.ctrl-state%3Dlvc68nj1h_45)

*Is there a knowledge library on commonly asked question or issues?*

- Users can find commonly asked questions and find solutions to common issue in the Issues section of the Forums Project.

*Where can I find training guides and documents?*

- Users can find FAQs, User Guides, Cheat Sheets, and Live training video at following location of the Forums project.
  - FAQs: Forums – Documents – FAQs
  - Training Documents: Forums – Documents – Training Manuals

### *How do I change my password? How do I reset my password?*

- Please refer to **Section 1.2.2.1 Changing Password**.

### *What are the password requirements?*

- Must be at least 14 characters in length.
- Must contain at least:
  - Two uppercase letters [A-Z]
  - Two lowercase letters [a-z]
  - Two digits [0-9]
  - Two special characters [e.g.: !@#\$%\*]
- A new password should differ from the changed password by at least 4 characters.
- A password cannot contain your network account name, username or display name.
- A password cannot be changed to any of the most recent 24 passwords.
- Must be changed no less frequently than every 60 days.
- Cannot be changed more frequently than once per day.

### *Can I share my login information with others?*

- No. Users must not to share their login information with anyone.

### *Can I use shared mailbox as my e-mail address?*

- No. Because of the privacy and system accountability, shared mailbox cannot be used.

### *Can I use eCMS for Pre-Award project?*

- At this time, users can only use the system for Post Award activities/tasks. Pre-Award functionality will be rolled up in the future releases.

### *Can I upload files containing PII (Personally identifiable information) to the system?*

- No. Users must not upload any files that contain PII (Personally identifiable information).



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## 2. DASHBOARDS AND REPORTING

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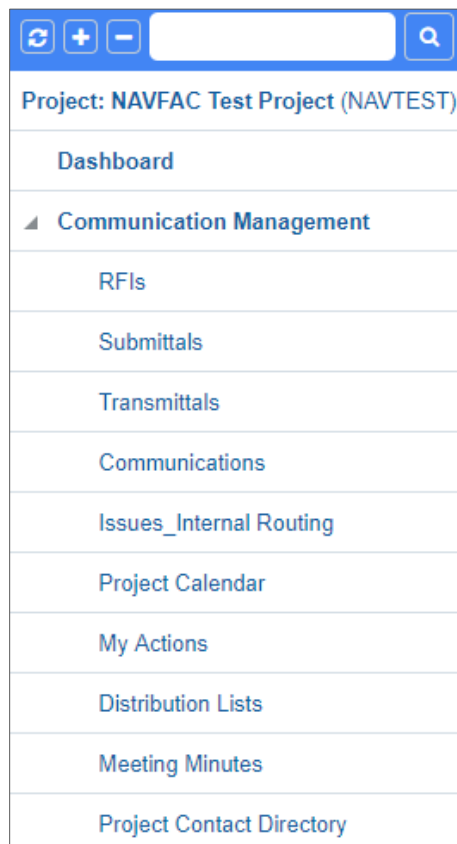
**Dashboard and Reporting** functionality is under construction and unavailable for use. Custom **Dashboards** will offer rolled-up project management information upon login. There will be a custom dashboard available based on your user role, and the capability to create additional dashboards to suit reporting needs.

## 3. COMMUNICATION MANAGEMENT

### 3.1. Background

The **Communication Management** section of eCMS lays the foundation for project management.

Folder structures may vary by projects and permissions, but **Communication Management** will always be included. The Communication Management section will allow for management of RFIs and Submittals, checking deadlines and responsibilities, and accessing team members.



**This section will cover:**

- How to access RFIs and Submittals sent by KTRs to NAVFAC
- Process for Responding to RFIs and Submittals
- How to add attachments to a record
- How to add a Reviewer(s) to an RFI or Submittal
- How to link related objects and internal routing to an RFI or Submittal
- How to check the RFI or Submittal history
- How to sort data
- How to track action items and milestones
- Accessing the team member directory

## 3.2. RFIs and Submittals

### 3.2.1 Purpose

The **Requests for Information** (RFIs) and **Submittal** applications allows KTRs working on construction and facilities management projects to ask questions to NAVFAC. An e-mail notification will alert you when NAVFAC responds. View all new responses and other communications upon login.

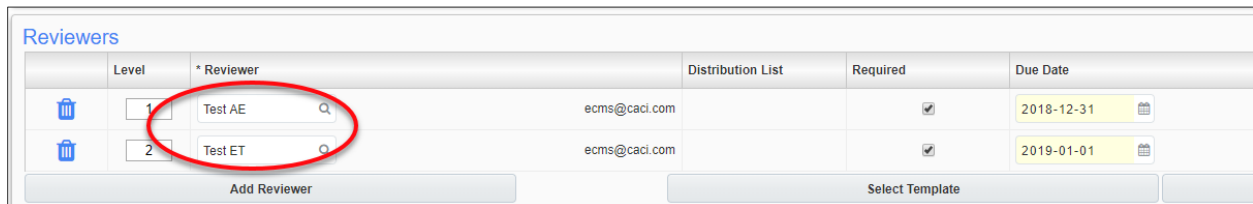
KTRs can send two types of official requests to NAVFAC: RFIs and Submittals.

- **RFIs** are a vehicle for the contractor to obtain added or clarifying information when the contract documents are unclear, incomplete, or contradictory.
- **Submittals** are drawings and information sent to the NAVFAC team for review.

Recently, new updates to eCMS were made to improve the efficiency and intuitiveness of processing RFIs and Submittals.

If you have used the system previously, you will notice that the detail screen for RFIs and Submittals are displayed differently. The screen is organized to display like a form and is arranged in sections for a more logical response. The basic information required has not changed. To improve and streamline collaboration, new functionality provides the ability to add **Reviewers**, facilitate **Reviewer Response** and use **Notes** to communicate efficiently.

A new **Reviewer** Section appears in both the RFI and Submittal Detail screens. In the system, subject matter experts (SMEs) are referred to as Reviewers. This section can only be completed by NAVFAC users; however, contractors are able to see who was added as a reviewer.



Level	* Reviewer	Distribution List	Required	Due Date
1	Test AE	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-31
2	Test ET	ecms@caci.com	<input checked="" type="checkbox"/>	2019-01-01

Add Reviewer      Select Template

- **RFIs** – For RFIs, this means the Forwarding function is no longer required. Instead, the COR/CM navigates to the **Reviewers** Section to add project SMEs for feedback. Reviewers can be added individually or a distribution list can be used.
- **Submittals** – Issues/Internal Routing are no longer required for the COR/CM/PAR to send a submittal to reviewers. Like RFIs, reviewers are added in the **Reviewers** Section.

**Reviewer Response** – This is a new feature for both RFIs and Submittals and simplifies the way reviewers respond to the COR/CM/PAR. Once the RFI/Submittal is sent to a reviewer, a **Reviewer Response** box appears at the top of the RFI and Submittal informing the reviewer of the response due date and a drop-down box of responses. The Reviewer selects a response, adds any additional notes and completes the review.

This action sends the RFI/Submittal to the COR/CM/PAR for final disposition.

**Reviewer response required by 2018-12-19**

Select Review Response...

Select Review Response...  
Concur  
Requires Further Discussion  
Disagree

Complete Review

**ZZ-ACME-00070**  

**\*Subject** Subject name for your Request For Information (RFI)

**\*RFI.Created\_Date** 2018-12-18

**GOV Disposition** Closed

**Required** 2018-12-31

**CON Spec-Section**  
Spec Paragraph  
Drawing Number

**FSC Spec-Section**  
Spec Page Number  
Drawing Detail

**Drawing Sheet Number**

**RFI Disclaimer**

NOTE: If the determination of this RFI is "Answered - No Cost" then this reply is given with the expressed understanding that it does not constitute a basis for any change in the amount or time of subject contract. Information provided in this response does not authorize work not currently included in the contract. If determination of this RFI is "Answered - Pending PCO" then this response may require a change to the contract.

A new **Notes** Section also appears in both the RFI and Submittal Detail screens. Notes can be submitted by all users, contractors and NAVFAC alike. All notes default to private, so they can only be seen initially by NAVFAC users. However, the COR/CM/PAR can decide which notes should be seen by the contractor by making them public.

RFI Detail
Attachments
Related Objects
History

Notes

001

**KTR PM**  
For COR review.

2018-12-30 04:26 AM

Private

Comment

+

002

**Test AE**  
Sending to AE and ET for review.

2018-12-30 08:22 AM

Private

Comment

+

003

**Test AE**  
Test AE has submitted their review with a status of Requires Further Discussion

2018-12-30 08:27 AM

Private

Comment

+

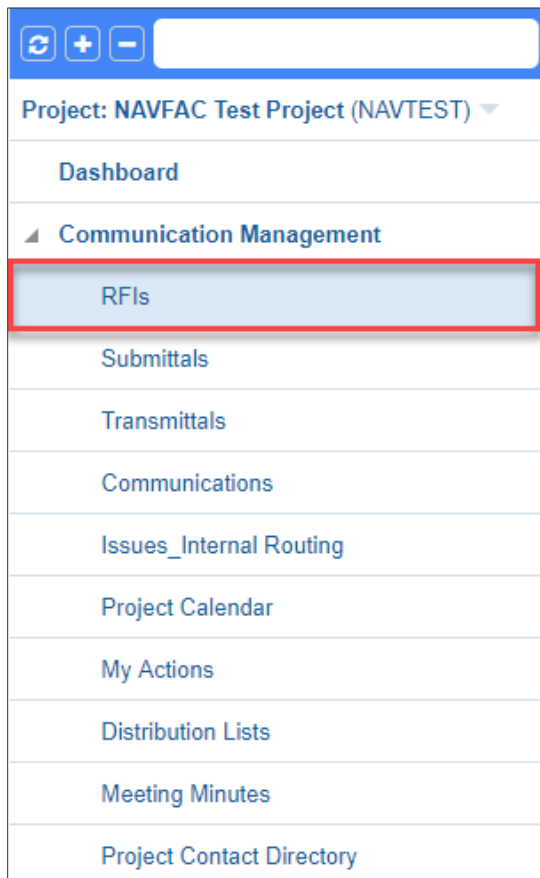
The software vendor continues to work on enhancements to further improve ease of use of the system. The user community will be notified of these changes as they occur. As you navigate through the system as a new user, you can request assistance through [ecmssupport@caci.com](mailto:ecmssupport@caci.com) or post an issue in the Forums Project (directions are provided in **Section 1.4 - Technical Support and Feedback**).

### 3.2.2 RFI Process

Using the navigation pane on the left side of your screen, click on Communication Management and then RFIs.

eCMS Processes and Procedures – NAVFAC User

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This opens the RFI Log. All NAVFAC users can see all RFIs created for the project.

However, when the COR/CM navigates to **Communications**, RFIs will be bolded with a number indicating that a new RFI(s) has been submitted for review.

Collaboration Suite										
<a href="#">Add RFI</a> <a href="#">Show Filter</a> <a href="#">Send To Spreadsheet</a> <a href="#">Enter Query</a>										
REQUEST FOR INFORMATION										
RFI No.	Forwarded as	Subject	Question	Date Created	From Contact	To Contact	Date Required	Date Answered	Status	Attachments Update Date
ZZ-ACME-00083		<b>Manual Update Test 2</b>		2018-12-30	KTR PM	Test COR				2019-01-08
ZZ-ACME-00002		Training Test 022118	Test	2018-02-21	KTR PM	Test COR				2 2018-12-11
ZZ-ACME-00003		Training Test 022818	Test	2018-02-28	KTR PM	Test COR				1
ZZ-ACME-00012		Training RFI 031418	Test	2018-03-14	KTR PM	Test COR				

In this case, the COR/CM has one (1) RFI to review. The RFIs can be opened by clicking the title listed on the navigation pane under **RFIs** or from the RFI log. The lists the RFIs to be reviewed at the top of the list. Once the RFI is opened, the **RFI Detail** screen will display.

RFI Detail	Attachments	Related Objects	History
<b>ZZ-ACME-00083</b>			
*Subject: Manual Update Test 2		*RFI.Created_Date: 2018-12-30	
GOV Disposition: Open		Required: 2019-01-25	
Change #:		FSC Spec-Section:	
CON Spec-Section:		Spec Page Number:	
Spec Paragraph:		Drawing Detail:	
Drawing Number:		RFI Disclaimer: NOTE: If the determination of th	
Drawing Sheet Number:			

The date and time the RFI was submitted will be recorded in the **Sender** Section of the RFI Detail screen.

Submitted (in EST) ☒ 2018-12-30 09:54 AM

### 3.2.2.1 Responding to an RFI as the COR/CM

To respond to an RFI, navigate to the RFI Detail screen. Scroll down to the **Notes** Section to view any notes the KTR may have added. The COR/CM can add a note here as well. The **Notes: Save\_ As\_Draft** functions like the **Submit** button at the top right of the screen. Clicking one or the other will send the RFI to the selected reviewers. Notes default to **Private** so that only NAVFAC users can see all notes.

**Notes**  
 001

	<b>Test COR</b>	2018-12-31 08:54 AM	Private
Reviewers Test			
Save_As_Draft Cancel			
Comment			

☒ Check Spelling
 ☒ Send I/O Email

If the COR/CM wants the contractor to see a note, **Public** can be selected from the drop-down menu.

Notes			
001	KTR PM	2018-12-30 04:28 AM	Public
For COR Review			+
Comment			
002	Test COR	2018-12-30 05:26 AM	Private
No additional review necessary.			+
Comment			

After reviewing the RFI, the COR has to can choose to respond directly to the RFI or request that the RFI by reviewed by project subject matter experts (SMEs).

### 3.2.2.2 Responding Directly to RFIs

To respond directly to an RFI, click **Answer** from the menu at the top of the screen.

Send I/O Email	Add CC	Edit	<b>Answer</b>	Reassign	Delete	Close RFI	Add Note	Print Report	Quick Print	Link to Issue	Back To Log
----------------	--------	------	---------------	----------	--------	-----------	----------	--------------	-------------	---------------	-------------

The GOV Disposition will default to **Closed**.

RFI Detail	Attachments	Related Objects	History
<b>ZZ-ACME-00083</b> *Subject: Manual Update Test 2 *RFI.Created_Date: 2018-12-30 Required: 2019-01-25 FSC Spec-Section: Spec Paragraph: Drawing Number: Drawing Sheet Number: RFI Disclaimer:			
GOV Disposition: <b>Closed</b> NOTE: If the determination of this RFI is "Answered - No Cost" then this reply is given with the expressed understanding that it does not constitute a basis for any change in the amount or time of subject contract. Information provided in this response does not authorize work not currently included in the contract. If determination of this RFI is "Answered - Pending PCO" then this response may require a change to the contract.			

Scroll down to the **Response** box and type the response in the **Answer** Box.

Response	
Answer COR's direct response. Details typed here. Select from Standard Response *Potential_Contract_Change: No RFI.Copy_Suggestion	Disclaimer Disclaimer_N Answered: 2019-01-02 Answered By: Test COR

If no changes are needed for a Proposed Solution, simply click the Submit button at the top, right corner of the screen. The RFI will show as processed and the KTR will be notified of the decision.

Check Spelling	<b>Submit</b>	Cancel
----------------	---------------	--------

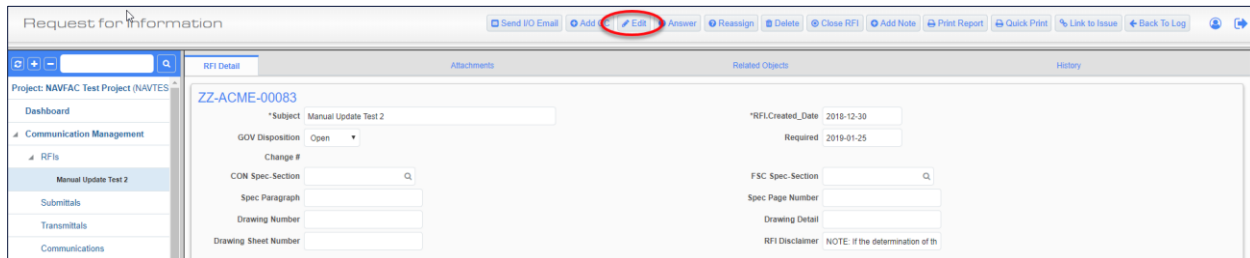
### 3.2.2.3 Adding Reviewers to RFIs

If the COR decides additional review is required, the GOV Disposition needs to be changed to Open from the drop-down menu.



RFI Detail	Attachments	Related Objects
<b>ZZ-ACME-00083</b>		
*Subject: Manual Update Test 2		*RFI.Created_Date: 2018-12-30
GOV Disposition: Open		Required: 2019-01-25
Change #:		
CON Spec-Section:		FSC Spec-Section:
Spec Paragraph:		Spec Page Number:
Drawing Number:		Drawing Detail:
Drawing Sheet Number:		RFI Disclaimer: NOTE: If the determination of th

To add reviewers to the RFI, click the **Edit** button at the top of the RFI screen. Reviewers can be added individually from a list of Project Contacts or a slate of reviewers can be added using a Distribution List.



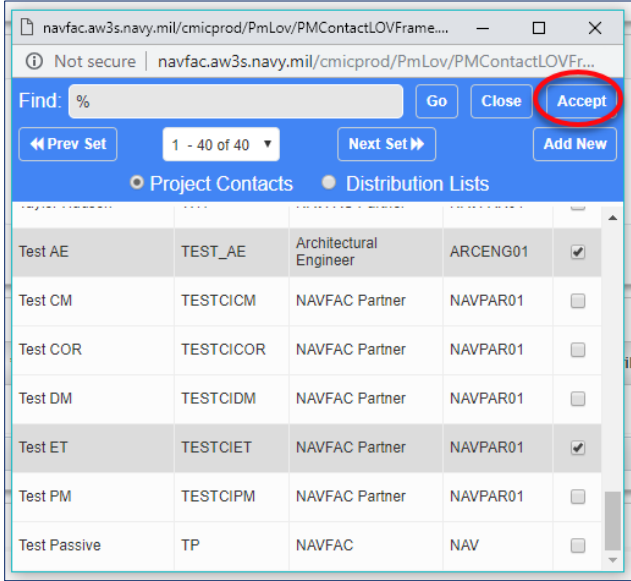
The screenshot shows the 'Request for Information' screen. The 'Edit' button is circled in red. The screen displays the RFI details for 'ZZ-ACME-00083'.

Scroll down to the **Reviewers** Section and click **Add Reviewer**.

To select individual reviewers, click the magnifying glass below the **Reviewer** category.

Reviewers							
Level	* Reviewer	Distribution List	Required	Due Date	GOV Disposition	Action Date	
	<input type="text"/> <input type="text"/>						
Add Reviewer		Select Template		Create Template			

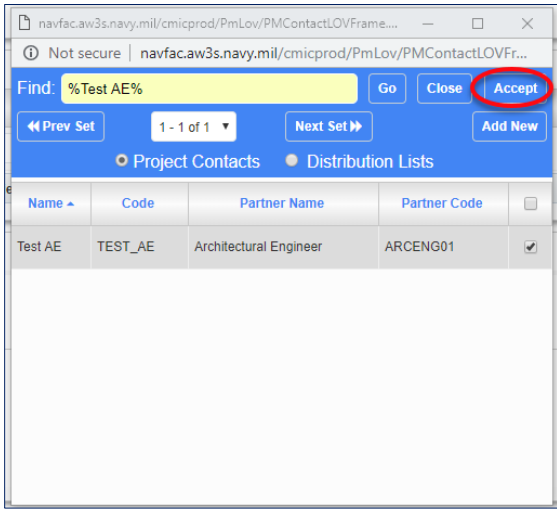
A pop-up box of Project Contacts will display. From here, there are two options to select reviewers. Reviewers can be selected by checking the box of the desired contacts. Once all the reviewers are checked, click **Accept**.



Name	Code	Partner Name	Partner Code	
Test AE	TEST_AE	Architectural Engineer	ARCENG01	<input checked="" type="checkbox"/>
Test CM	TESTCICM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test COR	TESTCICOR	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test DM	TESTCIDM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test ET	TESTCIET	NAVFAC Partner	NAVPAR01	<input checked="" type="checkbox"/>
Test PM	TESTCIPM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test Passive	TP	NAVFAC	NAV	<input type="checkbox"/>

You can also search for a reviewer by using the wild card %. Enter the contact name between % signs. Click **Go**.

The search will produce a list of names with the element searched for. In this case, there is just one, Test AE. Like the first option, to select the reviewer, check the box and click **Accept**.



Name	Code	Partner Name	Partner Code	
Test AE	TEST_AE	Architectural Engineer	ARCENG01	<input checked="" type="checkbox"/>

The selected Reviewers will list in the **Reviewers** Box. The sequence of **Reviewers** can be selected by designating the desired Level: Level 1, Level 2, Level 3 and so on. Check the **Required** box and select a **Due Date** for each Reviewer. The due date defaults to the current date for the first or only reviewer and adds a day for every additional reviewer. The COR/CM can change those dates to align with the RFI.

**Reviewers**

	Level	* Reviewer	Distribution List	Required	Due Date	GOV Disposition	Action Date
	1	Test AE	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-30		
	2	Test ET	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-31		
<b>Add Reviewer</b>							

Update the RFI with any additional information that you would like to include such as Attachments, Related Objects and/or a note in the **Notes** Section. At this point, the COR/CM can decide if the new note stays **Private** or should be changed to **Public**.

To add Reviewers using a Distribution List, from the Reviewers Section, click Select Template. A pop-up box will display with a list of distribution lists. Click the desired list, and it will populate the Reviewers list.

### 3.2.2.4 Responding to an RFI as a Reviewer (SME)

Open the **Communication Management** folder in the Navigation pane and click **RFIs**. The Reviewer(s) will not see RFI bolded or a number indicated the number of RFIs to be reviewed. This functionality will be provided. To find the RFI to be reviewed, use the **Date Created** Column to sort. Hover over the **Date Created** and double click. This will sort the RFIs, with the newest at the top. The new RFI will be located at the top of the RFI log. Click on the **Subject Line** to open.

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Project: NAVFAC Test Project (NAVTEST)

REQUEST FOR INFORMATION

RFI No.	Formulated as	Subject	Owner	Date Created	From Contact	To Contact	Date Required	Date Answered	Status	Attachments	Update Date
22-ACME-00070		your Request For Information (RFI)		2018-12-18	KTR PM	Test COR	2018-12-31				1 2018-12-18
22-ACME-00070		your Request For Information (RFI)		2018-12-18	KTR PM	Test COR	2018-12-31				1 2018-12-18
22-ACME-00070		your Request For Information (RFI)		2018-12-18	KTR PM	Test COR	2018-12-31				1 2018-12-18
22-ACME-00070		your Request For Information (RFI)		2018-12-18	KTR PM	Test COR	2018-12-31				1 2018-12-18
22-ACME-00070		your Request For Information (RFI)		2018-12-18	KTR PM	Test COR	2018-12-31				1 2018-12-18

When the Reviewer opens the RFI, there will be a notification in orange text at the top of the screen indicating the due date for the response from the Reviewer. From here, the Reviewer can review the details of the RFI, add **Notes**, open and review the **Attachments, Related Objects** and **History**. Once everything has been reviewed, the Reviewer can select an answer from the **Select Review Response** and click **Complete Review**.

RFI Detail | Attachments | Related Objects | History

**Reviewer response required by 2018-12-19**

**ZZ-ACME-00070**

\*Subject: Subject name for your Request For Information (RFI)

GOV Disposition: Closed

CON Spec-Section

Spec Paragraph

Drawing Number

Drawing Sheet Number

\*RFICreated\_Date: 2018-12-18

Required: 2018-12-31

FSC Spec-Section

Spec Page Number

Drawing Detail

RFI Disclaimer

NOTE: If the determination of this RFI is "Answered - No Cost" then this reply is given with the expressed understanding that it does not constitute a basis for any change in the amount or time of subject contract. Information provided in this response does not authorize work not currently included in the contract. If determination of this RFI is "Answered - Pending PCO" then this response may require a change to the contract.

Select Review Response...  
 Select Review Response...  
 Concur  
 Requires Further Discussion  
 Disagree

Complete Review

The Reviewer scrolls to the Reviewers Section to check that the **GOV Disposition** has been selected and the decision date is reflected under the **Action Date**.

Reviewers

	Level	* Reviewer	Distribution List	Required	Due Date	GOV Disposition	Action Date
	1	Test AE	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-30	Requires Further Discussion	2018-12-30
	2	Test ET	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-31	Concur	2018-12-30

Add Reviewer | Select Template | Create Template

### 3.2.2.5 COR/CM Answer after Reviewer(s) Respond to RFI

Once the response is received from the Reviewer, open the RFI and scroll to the Reviewers section to view the responses from the reviewers. The responses are found under **GOV Disposition** along with the response date listed under **Action Date**.

Reviewers

	Level	* Reviewer	Distribution List	Required	Due Date	GOV Disposition	Action Date
	1	Test AE	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-30	Requires Further Discussion	2018-12-30
	2	Test ET	ecms@caci.com	<input checked="" type="checkbox"/>	2018-12-31	Concur	2018-12-30

Add Reviewer | Select Template | Create Template

Open and review any additional **Attachments**, **Related Objects** and **Notes**. A new note may be added. At this point, the COR can decide if any or all of the Notes should remain **Private** or be made **Public**.

**Notes**

001	KTR PM	2018-12-30 04:28 AM	Public	+
For COR Review				
<a href="#">Comment</a>				
002	Test COR	2018-12-30 04:26 AM	Private	+
No additional review necessary.				
<a href="#">Comment</a>				

Now, the COR/CM is ready to answer the RFI. Scroll to the top of the screen and the following menu will display:

[Send I/O Email](#)
[Add CC](#)
[Edit](#)
[Answer](#)
[Reassign](#)
[Delete](#)
[Close RFI](#)
[Add Note](#)
[Print Report](#)

Each of these options serves a distinct purpose:

- **Send I/O E-mail** – This field has been disabled for NAVFAC security purposes
- **Add CC** - Copies a User to an RFI; allows the User to edit and add notes
- **Edit** – Allows for changes to be made in any field
- **Answer** – Allows additional information to be added under the **Notes** Section
- **Reassign** – Used by the COR/PAR to reassign to alternative COR/PAR
- **Delete** – COR/PAR only can delete an RFI
- **Close RFI** – Final disposition made by the COR/PAR
- **Add Note** - Adds a note to the bottom of the RFI
- **Print Report** - Prints a report of the RFI
- **Quick Print** – This field is currently not configured for use
- **Link to Issue** - Links the RFI to Issues\_Internal Routing task for team members
- **Back to Log** – Returns user to RFI Log

However, the most widely used is **Answer**.

Clicking **Answer** will display the RFI Detail screen, scroll down to the **Response** Section.

**Response**

Answer

Type COR/PAR response

Disclaimer

Disclaimer\_N

[Select from Standard Response](#)

\*Potential\_Contract\_Change No

RFI.Copy\_Suggestion

Answered 2018-12-28

Answered By Test COR

Type the response in the Answer box and click Close RFI at the top right of the screen. The Contractor will be notified that an RFI has been answered.

[Send I/O Email](#)
[Add](#)
[Add CC](#)
[Close RFI](#)
[Add Note](#)
[Print Report](#)
[Quick Print](#)
[Link to Issue](#)
[Back To Log](#)

### 3.2.3 Attachments, Related Objects, and History

When viewing an individual RFI from the navigation pane, four tabs appear across the top of the screen.

RFI Detail	Attachments	Related Objects	History
------------	-------------	-----------------	---------

- The first tab, **RFI Detail**, has the bulk of information about the RFI.
 

RFI Detail
  
- The **Attachments** tab will have attachments sent with this RFI. This is another screen that can be used to add attachments.
 

Attachments
  
- The **Related Objects** tab will track communication, issues, and relevant documentation with stakeholders throughout the project.
 

Related Objects
  
- The **History** tab will allow the viewing of updates and decisions made on the RFI.
 

History

#### 3.2.3.1 Attachments

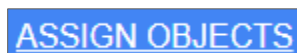
To upload or download attachments, refer to **Section 5.4.1 Uploading Attachments** and **Section 5.4.2 Downloading Attachments**.

#### 3.2.3.2 Adding Related Objects

The **Related Object** tab allows different components, such as **Communications**, **Daily Reports**, **Internal Routing**, **Documents**, and **Notices** to be added to an RFI.



Click on the **Related Objects** tab and select the **Assign Object** button at the right corner of the screen.



Click the dropdown menu in the **Object Type** field and select the type of object to add. You may now link to an existing object by checking the object and clicking **Accept**. You can also create a new object by selecting the **Add New** button. Both situations are shown below.

Find: %    Selected 1

<< Prev Set 1 - 29 of 29 Next Set >> Clear All Se

Object Type: Communication

Communication	CID-00025	Test Communication	<input checked="" type="checkbox"/>
---------------	-----------	--------------------	-------------------------------------

Find: %    Selected 0

<< Prev Set 1 - 29 of 29 Next Set >> Clear All Se

Object Type: Communication

There will now be a checkmark next to the **Related Objects** tab indicating that there is a related object.

**Related Objects** ✓

### 3.2.3.3 Reviewing the RFI History

The **History** tab displays all decisions, edits, and notes made to an RFI.

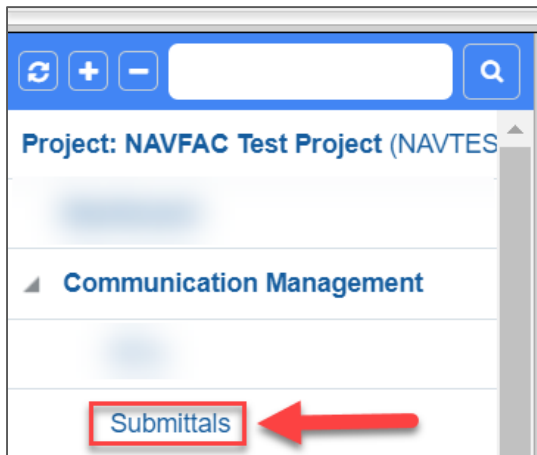
RFI Detail		Attachments ✓		Related Objects ✓		History	Status
Date	Author	Recipient	Action	Description			
2018-12-27 09:12 AM	KTR PM		Added Document	NAVTE RFI-0052 - PNG_transparency_demonstration_1			



### 3.2.4 Submittals

#### 3.2.4.1 Responding to a Submittal as the COR

To access Submittals, go to the Navigation Panel, open Communication Management, and then select **Submittals**.



From here, you can see all Submittals created on this project.\*Currently, Submittals will not be bolded or display the number of how many submittals need to be answered. This functionality will be added.\*

Click on the **Status** heading so the submittals will filter the “Open” submittals to the top.

<a href="#">Add Submittal</a> <a href="#">Import</a> <a href="#">Show Filter</a> <a href="#">Send To Spreadsheet</a> <a href="#">Enter Query</a>													
SUBMITTALS (FILTERED)													
Submittal No.	Submittal Type Code	Spec. Section	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner	Sent To Contact	Forwarded To Partner	Forwarded To Contact	Submittal Variation	Status

Below is an example of the submittals that are “Open” filtering to the top.

<a href="#">Add Submittal</a> <a href="#">Import</a> <a href="#">Show Filter</a> <a href="#">Send To Spreadsheet</a> <a href="#">Enter Query</a>													
SUBMITTALS (FILTERED)													
Submittal No.	Submittal Type Code	Spec. Section	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner	Sent To Contact	Forwarded To Partner	Forwarded To Contact	Submittal Variation	Status
													1. Open
													1. Open
													1. Open



Locate the submittal and then hover over and click the Submittal No. to view the submittal.

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As the COR, you have two options: to answer the Sumittal or to Add a Reviewer. For this example, we will answer the Submittal. **Select the drop down for Status.**

Submittal

[Send I/O Email](#)
[Check Spelling](#)
[Save](#)
[Cancel](#)

[Submittal Detail](#)
[Notes](#)
[Related Objects](#)
[Attachments](#)
[History](#)

Submittal Detail

★ Submittal No. CC18NA-00084  
 ★ Name Contractor Name  
 Type Safety Plan ☐ Procurement Item

Status 1. Open  
 Package No.   
 Spec Section 01 35 26  
 Spec Sub-Section

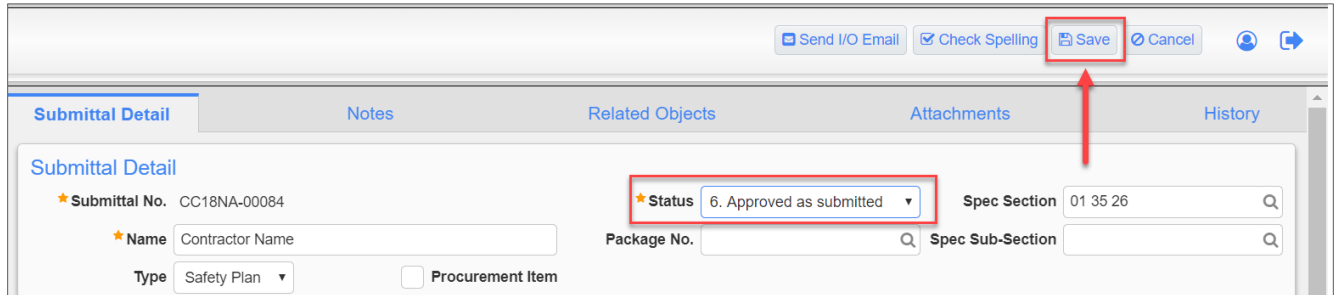
There are eight options to choose from: 1. Open, 2. Disapproved; Resubmit, 3. Does not comply; Resubmit, 4. Note on drawings; Resubmit, 5. Approved, note on drawings, 6. Approved as submitted, 7. Acknowledged; Completed, 8. Sent separately, Completed.

★ Status

Package No.

1. Open  
 2. Disapproved; Resubmit  
 3. Does not comply; Resubmit  
 4. Note on drawings; Resubmit  
 5. Approved, note on drawings  
 6. Approved as submitted  
 7. Acknowledged; Completed  
 8. Sent separately; Completed

Once you have reviewed the submittal and selected the **Status**, click **Save** at the top right corner. For this example, we chose option 6. “Approved as submitted”. Now the contractor can see the COR’s response.



Send I/O Email Check Spelling **Save** Cancel

Submittal Detail Notes Related Objects Attachments History

Submittal Detail

★ Submittal No. CC18NA-00084

★ Name Contractor Name

Type Safety Plan ☐ Procurement Item

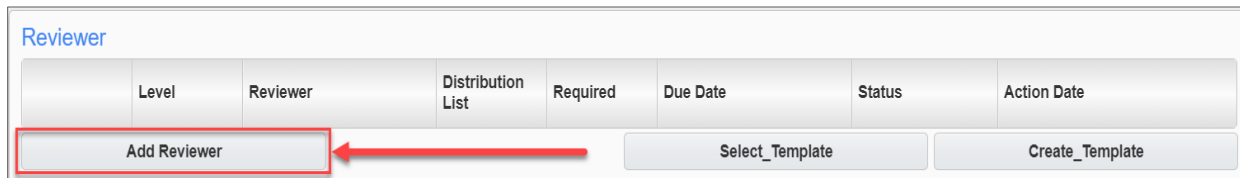
★ Status 6. Approved as submitted Spec Section 01 35 26

Package No. Spec Sub-Section

### 3.2.4.2 How the COR adds a reviewer

As the COR, you have two options: to answer the Sumittal or to Add a Reviewer. For this example, we will add a Reviewer. In the submittal, scroll down to find the **Reviewer** section.

Then select **Add a Reviewer**.

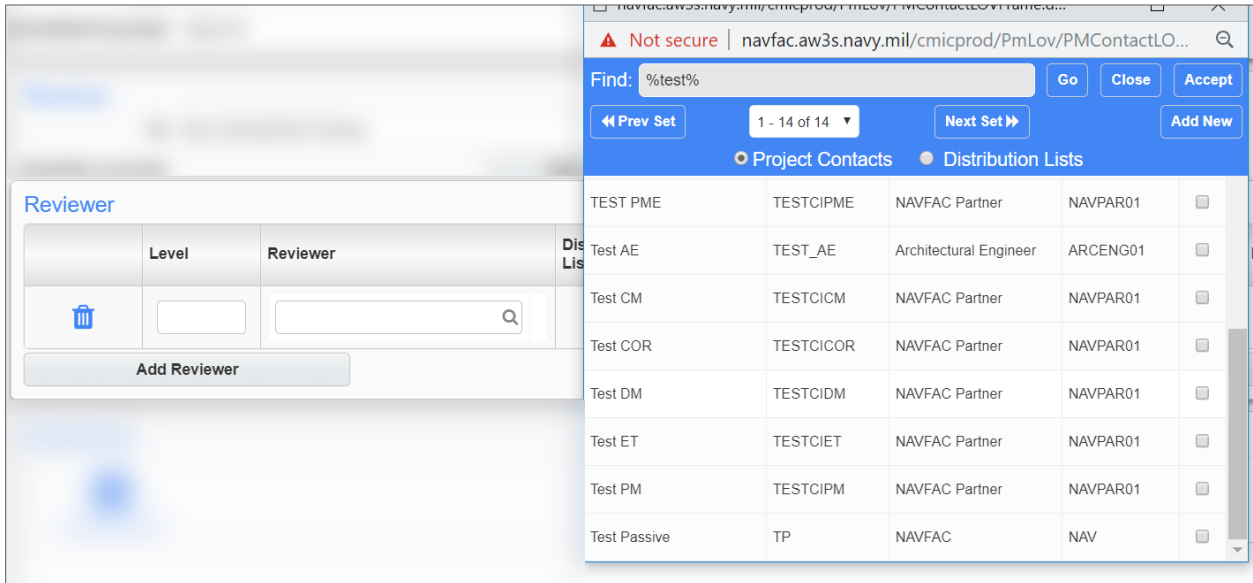


Reviewer

	Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
Add Reviewer							
				Select_Template	Create_Template		

Then click the **magnifying glass** to choose the reviewer.

To search for the reviewer, type the percent sign (%), which is the wild card for your search and then type either the first or last name. In this example, %test% is typed in the Find bar, and the names with “test” filtered.



Find: %test% [Go] [Close] [Accept]

1 - 14 of 14 [Prev Set] [Next Set] [Add New]

Project Contacts Distribution Lists

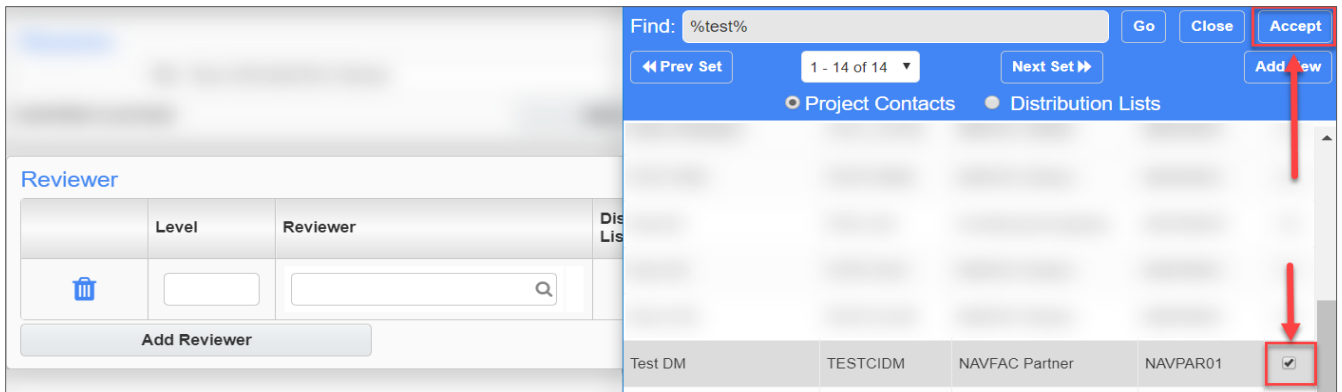
TEST PME	TESTIPME	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test AE	TEST_AE	Architectural Engineer	ARCENG01	<input type="checkbox"/>
Test CM	TESTICM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test COR	TESTICOR	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test DM	TESTCIDM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test ET	TESTCIET	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test PM	TESTCIPM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test Passive	TP	NAVFAC	NAV	<input type="checkbox"/>

Reviewer

Level	Reviewer	Dis Lis
<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Reviewer

For this example, the Design Manager will be added to be the reviewer. Make sure to check the box to the right of their name, then click **Accept** at the top right.



Find: %test% [Go] [Close] [Accept]

1 - 14 of 14 [Prev Set] [Next Set] [Add New]

Project Contacts Distribution Lists

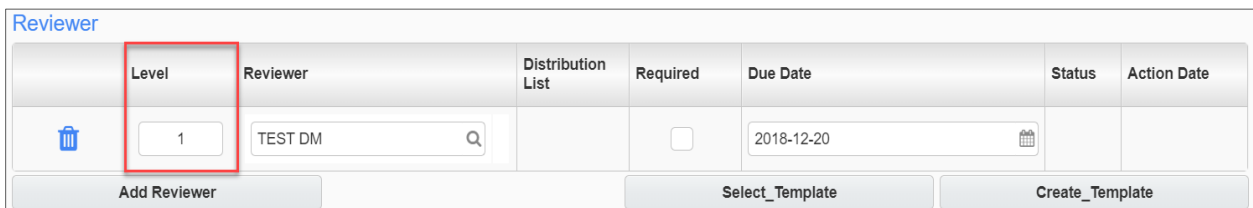
TEST PME	TESTIPME	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test AE	TEST_AE	Architectural Engineer	ARCENG01	<input type="checkbox"/>
Test CM	TESTICM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test COR	TESTICOR	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test DM	TESTCIDM	NAVFAC Partner	NAVPAR01	<input checked="" type="checkbox"/>
Test ET	TESTCIET	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test PM	TESTCIPM	NAVFAC Partner	NAVPAR01	<input type="checkbox"/>
Test Passive	TP	NAVFAC	NAV	<input type="checkbox"/>

Reviewer

Level	Reviewer	Dis Lis
<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Reviewer

The **level** indicates the order of review. For an example, if you add multiple reviewers, the level 1 would be the first to review the RFI, the level 2 would be the second to review, and so on.



Reviewer

Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
1	TEST DM		<input type="checkbox"/>	2018-12-20		

Add Reviewer

Select\_Template Create\_Template

Click the **Required** checkbox and then click on the **mini calendar** in the Due Date section.

Reviewer

	Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
	1	TEST DM		<input type="checkbox"/>	2018-12-20		

The COR can change the due date for the reviewer response. Select the due date.

Reviewer

	Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
	1	TEST DM		<input checked="" type="checkbox"/>	2018-12-28		

Once you have reviewed the submittal and you're ready to send it to the reviewer, select **Save**. The reviewer will now need to respond.

Submittal

	Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
	1	TEST DM		<input checked="" type="checkbox"/>	2018-12-28		

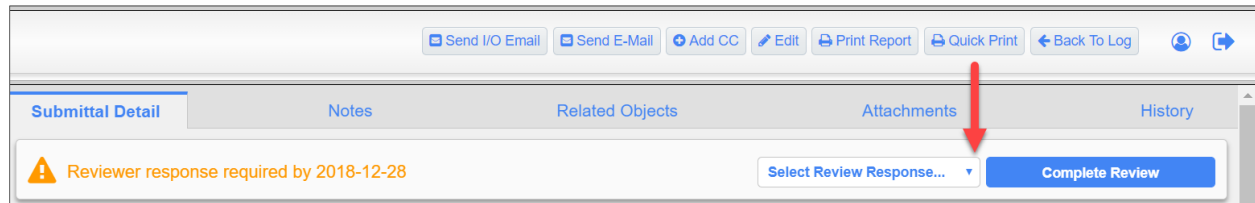
### 3.2.4.3 Responding to a Submittal as the Reviewer

Once the COR adds a reviewer and saves the submittal, it is time for the reviewer to respond.

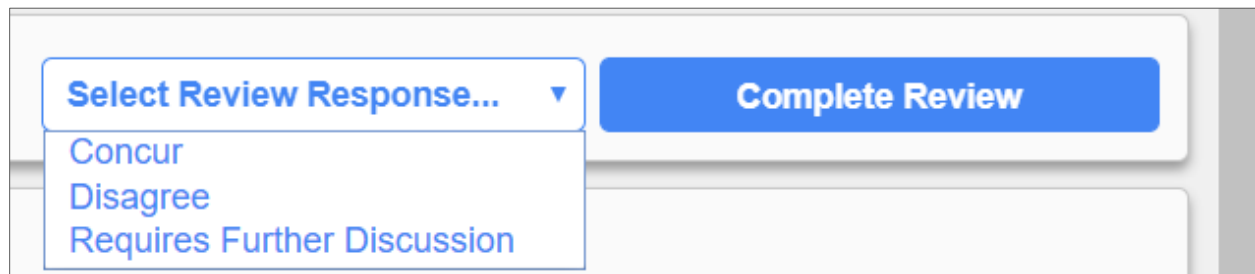
After the reviewer logs in, go to the Navigation Panel, open Communication Management, and then select **Submittals**. \*Currently, "Submittals" will not be bolded or display the number of how many submittals need to be reviewed. This functionality will be added.\*



Once the reviewer opens the submittal, they will see a notification that appears at the top of the submittal in orange text, informing the reviewer of when the response is due. Review the submittal and then click on the **Select Review Response** drop down box.

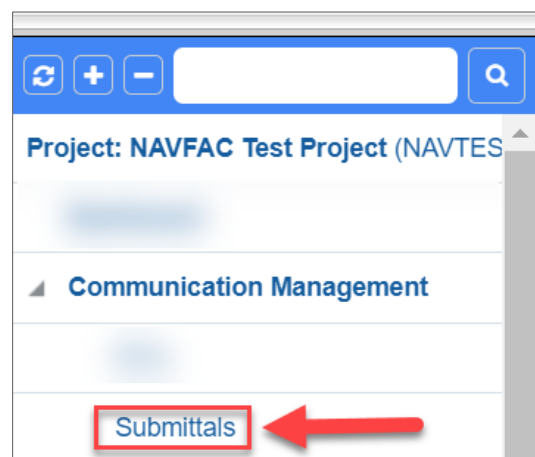


Select the review response for the submittal. The three options are: Concur, Disagree, and Requires Further Discussion. Once you have selected your review response, click **Complete Review**. The COR will now need to respond to the Submittal.



#### 3.2.4.4 Responding to a Submittal as the COR after the Reviewer has responded

After logging in, go to the Navigation Panel, open Communication Management, and then select **Submittals**. \*Currently, "Submittals" will not be bolded or display the number of how many submittals need to be reviewed. This functionality will be added.\*



Click on the **Status** heading so the submittals will filter the “Open” submittals to the top.

<a href="#">Add Submittal</a> <a href="#">Import</a> <a href="#">Show Filter</a> <a href="#">Send To Spreadsheet</a> <a href="#">Enter Query</a>													
SUBMITTALS (FILTERED)													
Submittal No.	Submittal Type Code	Spec. Section	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner	Sent To Contact	Forwarded To Partner	Forwarded To Contact	Submittal Variation	Status

Locate the submittal and then hover over and click the Submittal No. to view the submittal.

<a href="#">Add Submittal</a> <a href="#">Import</a> <a href="#">Show Filter</a> <a href="#">Send To Spreadsheet</a> <a href="#">Enter Query</a>													
SUBMITTALS (FILTERED)													
Submittal No.	Submittal Type Code	Spec. Section	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner	Sent To Contact	Forwarded To Partner	Forwarded To Contact	Submittal Variation	Status
CC18NA-00084	SAF	01 35 26	Contractor Name	ZZ-Acme Supply	KTR PM			NAVFAC Partner	Test COR			No	1. Open

Once you have opened the submittal, scroll down to the **Reviewer** section to see what their response was. The response will be under the “Status” category. In this example, you can see that the reviewer Concurred with the submittal.

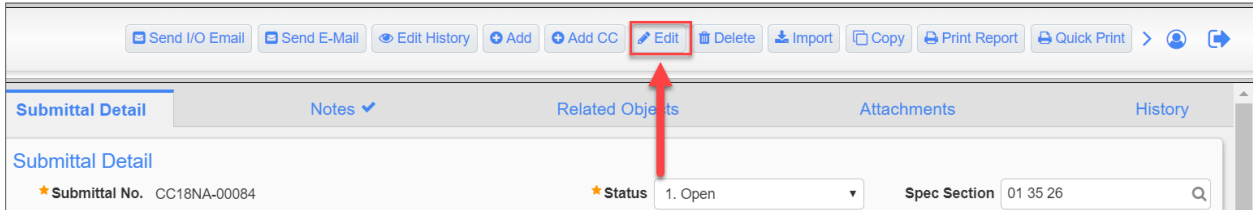
Reviewer							
	Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
	1	Test DM	NAVFAC Partner	<input checked="" type="checkbox"/>	2018-12-28	Concur	2018-12-20
<a href="#">Add Reviewer</a>		<a href="#">Select_Template</a>		<a href="#">Create_Template</a>			

The action date is when the reviewer responded to the submittal.

Reviewer							
	Level	Reviewer	Distribution List	Required	Due Date	Status	Action Date
	1	Test DM	NAVFAC Partner	<input checked="" type="checkbox"/>	2018-12-28	Concur	2018-12-20
<a href="#">Add Reviewer</a>		<a href="#">Select_Template</a>		<a href="#">Create_Template</a>			

After reviewing the submittal and the response from the reviewer, scroll to the top of the submittal and select “Edit”.





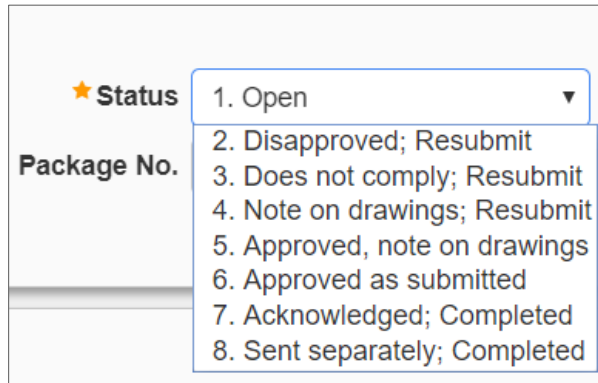
Send I/O Email Send E-Mail Edit History Add Add CC **Edit** Delete Import Copy Print Report Quick Print > [User Icon]

Submittal Detail Notes Related Objects Attachments History

Submittal Detail

★ Submittal No. CC18NA-00084 ★ Status 1. Open Spec Section 01 35 26

Now that you are in edit mode, click on the Status drop down box. There are eight options to choose from: 1. Open, 2. Disapproved; Resubmit, 3. Does not comply; Resubmit, 4. Note on drawings; Resubmit, 5. Approved, note on drawings, 6. Approved as submitted, 7. Acknowledged; Completed, 8. Sent separately, Completed.

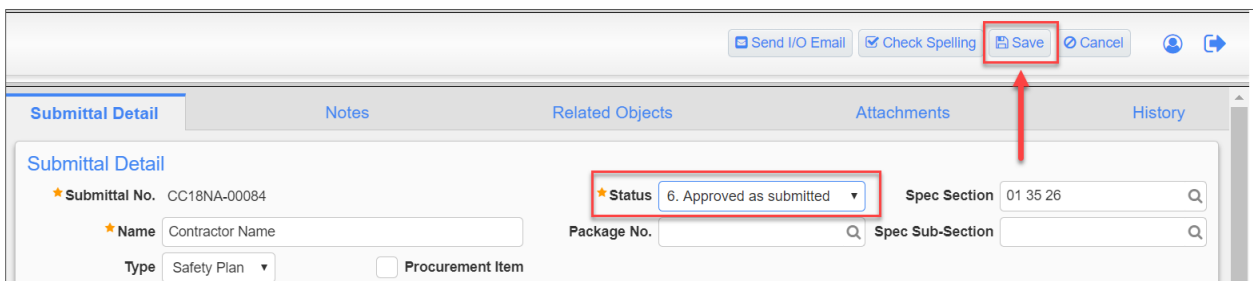


★ Status 1. Open ▼

Package No.

2. Disapproved; Resubmit  
3. Does not comply; Resubmit  
4. Note on drawings; Resubmit  
5. Approved, note on drawings  
6. Approved as submitted  
7. Acknowledged; Completed  
8. Sent separately; Completed

For this example, option 6. “Approved as submitted” was chosen as the status. Once you have reviewed the submittal and selected the Status, click **Save** at the top right corner. Now the contractor can see the COR’s response.



Send I/O Email Check Spelling **Save** Cancel [User Icon]

Submittal Detail Notes Related Objects Attachments History

Submittal Detail

★ Submittal No. CC18NA-00084 ★ Status 6. Approved as submitted Spec Section 01 35 26

★ Name Contractor Name Package No. Spec Sub-Section

Type Safety Plan ☐ Procurement Item

### 3.2.5 Sorting Data

eCMS offers three ways to filter and sort information to find specific cases to review.

- Use the Filtering function in eCMS (**Most Complicated**)

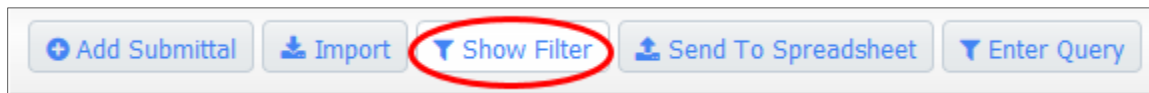




- Send information to a downloadable Excel spreadsheet and sort the information from there, or
- Execute a query (**Simplest**)

### 3.2.5.1 Filtering

Select the **RFIs** or **Submittals** button in the navigation bar on the left side of the screen to pull up a list of all RFIs or Submittals. To find specific RFIs or Submittals, sort the list by selecting the **Show Filter** button at the top, right of the screen.



Column	Operator	Value	Example Value
Submittal No.	<input type="text"/>	<input type="text"/>	
Submittal Type Code	<input type="text"/>	<input type="text"/>	
Spec. Section	<input type="text"/>	<input type="text"/>	
Name	<input type="text"/>	<input type="text"/>	
From Partner	<input type="text"/>	<input type="text"/>	
From Contact	<input type="text"/>	<input type="text"/>	
Returned By Partner	<input type="text"/>	<input type="text"/>	
Returned By Contact	<input type="text"/>	<input type="text"/>	
Sent To Partner	<input type="text"/>	<input type="text"/>	
Sent To Contact	<input type="text"/>	<input type="text"/>	
Forwarded To Partner	<input type="text"/>	<input type="text"/>	
Forwarded To Contact	<input type="text"/>	<input type="text"/>	
Submittal Variation	<input type="text"/>	<input type="text"/>	
Status	<input type="text"/>	<input type="text"/>	
Current Cycle	<input type="text"/>	<input type="text"/>	
Attachments	<input type="text"/>	<input type="text"/>	
QC Inspect and Test Reqmnt	!= <input type="text"/>	<input type="text" value="Y"/>	'Xyz'
Procurement Item	!= <input type="text"/>	<input type="text" value="Y"/>	'Xyz'
	<input type="text"/>	<input type="text"/>	

This will pull up a list of fields used for filtering searches. Using the two columns available, enter the Operator code and Value to sort data.

**Operator:** Select the dropdown arrow next to the field to sort. A list of symbols appears that set the parameters of the filter:

Operator Symbol	Meaning
=	Equals
!=	Not Equals
>	Greater Than
>=	Greater Than or Equal To
<	Less Than
<=	Less Than or Equal To
IN	Equal to Any Value in Test
NOT IN	Not Equal to Any Value in Test
LIKE	Value A matches pattern in Value B
NOT LIKE	Value A does not match pattern in Value B
BETWEEN	Value Range between X and Y
NOT BETWEEN	Value Range not between X and Y
IS NULL	Find Blank or Incorrect Values
IS NOT NULL	Find Values that are Complete

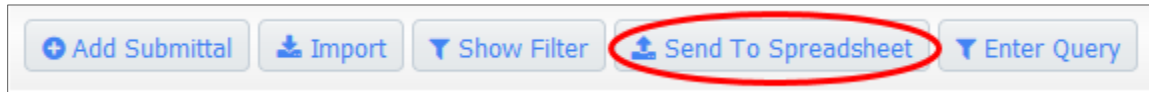
After selecting a symbol in the **Operator** column, enter the values to filter in the **Value** column. To ensure correct filtering, enter the values to match the **Example Value** format that appears in the far-right column.

Column	Operator	Value	Example Value
Submittal No.	<input type="text" value=""/>	<input type="text" value=""/>	
Submittal Type Code	<input type="text" value=""/>	<input type="text" value=""/>	
Spec. Section	<input type="text" value=""/>	<input type="text" value=""/>	
Name	<input type="text" value=""/>	<input type="text" value=""/>	
From Partner	<input type="text" value=""/>	<input type="text" value=""/>	
From Contact	= <input type="text" value=""/>	'Bob Smith'	'Xyz'

Enter dates in DD-MON-YY format and use a % as a wildcard for searches. This field is somewhat technical. An easier way to sort data is to download to Excel or use the **Enter Query** functions described in the following sections. Filtering can be used to set up a permanent view of folders for those that know what they want to see each day.

### 3.2.5.2 Send to Spreadsheet

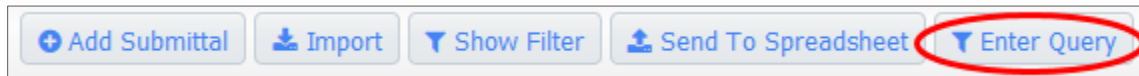
Send all RFIs or Submittals to an Excel spreadsheet, or send a filtered list to an Excel spreadsheet by clicking on the Send to Spreadsheet button in the top, right corner of the screen.



This will automatically download a spreadsheet with all the user's **RFI** or **Submittal** information included. Use the functions of Microsoft Excel to sort the fields and find specific information. If a filter is turned on, only the filtered list will download to Excel.

### 3.2.5.3 Enter and Execute a Query

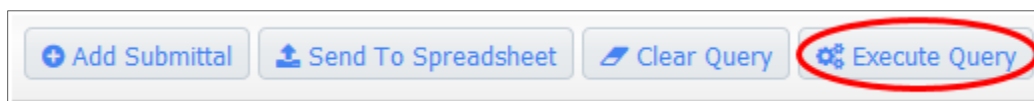
Select **Enter Query** from the top, right of the screen.



Blue bars will display at the top of the spreadsheet; enter the search terms for the field to be filtered. For instance, to filter all Submittals with the word Light in the title, enter Light% under the **Name** field.

SUBMITTALS							
◀	Submittal No.	Name	From Partner	From Contact	Returned By Partner	Returned By Contact	Sent To Partner
		LIGHT%					
◀	0002	Subject	Test Company	Government Cor			

Select **Execute Query** in the top, right, and the system will show a list of all Submittals.



To query multiple fields, enter the information in each field and click **Execute Query**. Use % to sort for a portion of text. For example, let's say we want to search for all RFIs that have the word "maximum" in the subject line. Someone may have shortened it to "max" when entering this field. To find everything with the word "Maximum" in the subject, we would enter %max% in the query field under Subject. This will pull all RFIs with the word "Max" in it, even if they have words or letters in front or after that term. This field is not case sensitive.

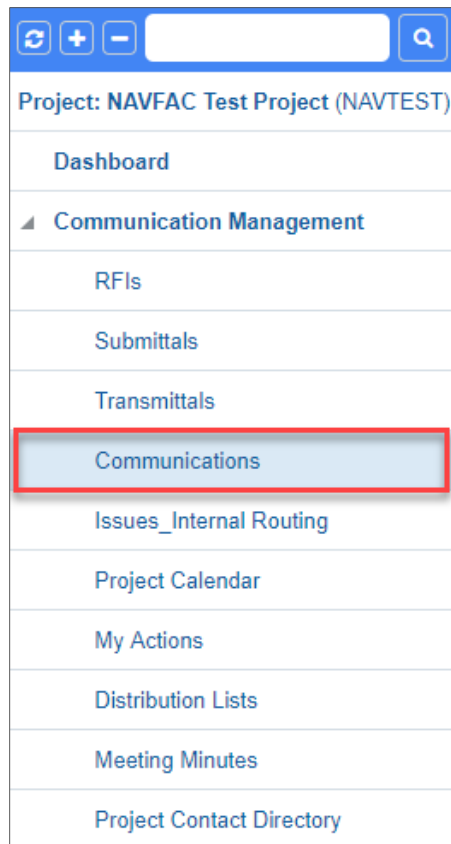
## 3.3. Communications and Issues/Internal Routing

### 3.3.1 Purpose

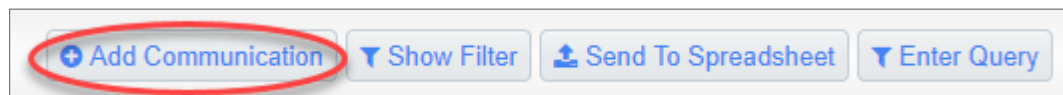
**Communications** and **Issues\_Internal Routing** (also referred to as Issues), can be used to convey information or assign a task to a team member or stakeholder. Using these applications will allow information, reminders, and task deadlines to show up on the recipient's **Project Calendar** and **My Actions** list.

### 3.3.2 Adding a New Communication

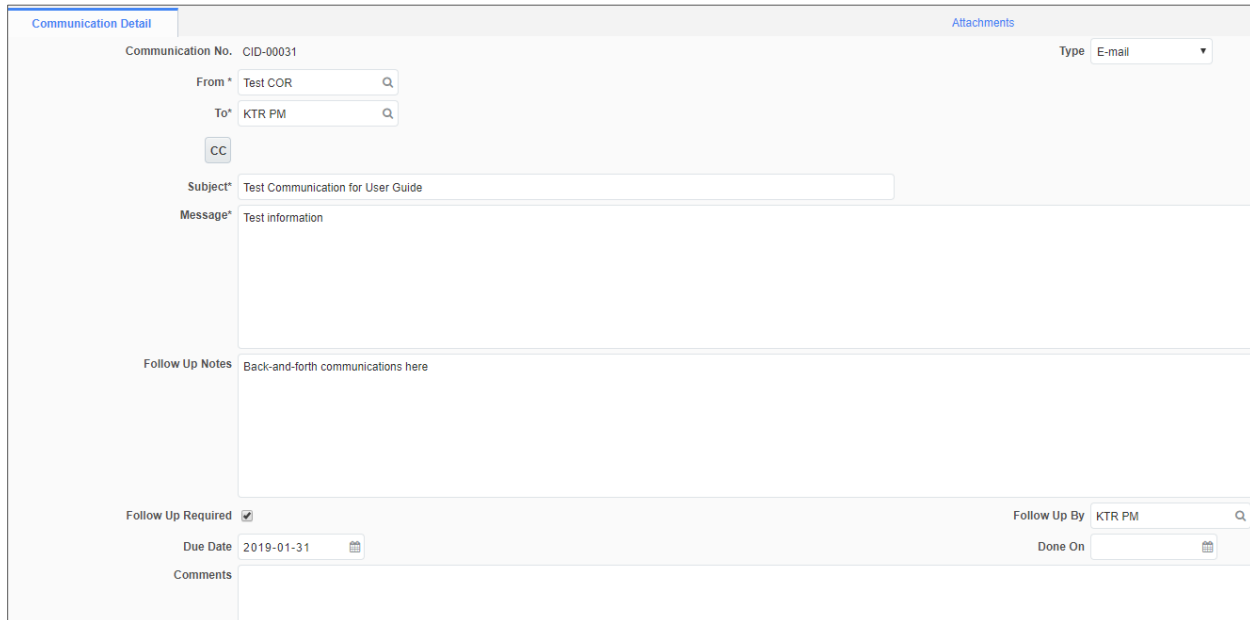
There are two ways to create a **Communication** record. Enter the **Communication** directly through the **Navigation Pane** or use the **Related Objects** tab on any application. Starting in the **Navigation Pane** of the relevant project, open the **Communications** folder.



This will pull up a list of existing communications on this project. At the top, right of the screen, select **Add Communication**.



Complete the required fields in the **Communication Detail** screen.



The screenshot shows the 'Communication Detail' screen with the following fields and values:

- Communication No.:** CID-00031
- Type:** E-mail
- From \*:** Test COR
- To\*:** KTR PM
- CC:** (button)
- Subject\*:** Test Communication for User Guide
- Message\*:** Test information
- Follow Up Notes:** Back-and-forth communications here
- Follow Up Required:** ☒
- Follow Up By:** KTR PM
- Due Date:** 2019-01-31
- Done On:** (calendar icon)
- Comments:** (empty text area)

Below is a brief description of each field:

**Communication No.** – This field generates a number automatically to organize **Communications**.

Communication No. CID-00031

**From** – This field will contain the sender's name.

From \* Test COR

**To** – Using the dropdown menu, select the team member to receive this Communication.

To\* KTR PM

**CC** – Use this button to copy additional people into the message. They will not be able to respond, but they can view all comments.



The CC section includes a 'CC' button, a search input field, and buttons for adding (+), removing (-), and confirming (OK) recipients.

**Subject** – Enter a short, descriptive title to give a synopsis of the message.

Subject\* Test Communication for User Guide

**Message** – Write out everything needed to describe the situation.

<b>Message*</b>	Test information
-----------------	------------------


**Follow-Up Notes** – This section may be completed after receiving a response so that an official record of the decision is captured.

<b>Follow Up Notes</b>	Back-and-forth communications here
------------------------	------------------------------------


**Follow-Up Required** – Select this button if a response is required from the recipient. If it is for informational purposes only, this can be left blank.

<b>Follow Up Required</b> <input checked="" type="checkbox"/>
---

**Due Date** – Using the calendar icon next to this field, select the deadline that the recipient has to respond.

<b>Due Date</b>	2019-01-31 
-----------------	--

**Follow-Up By** – The person responding to the communication can use the dropdown menu to list their name here when responding. If someone else provided the answer, they can list them here.

<b>Follow Up By</b>	KTR PM 
---------------------	--






**Done On** – This field will auto-populate when the Communication is closed.

<b>Done On</b>	
----------------	---

**Comments** – The person responding can provide their feedback here.

<b>Comments</b>	
-----------------	--

Upon completion of the required fields and adding the message, click **Submit** in the top, right of the screen.

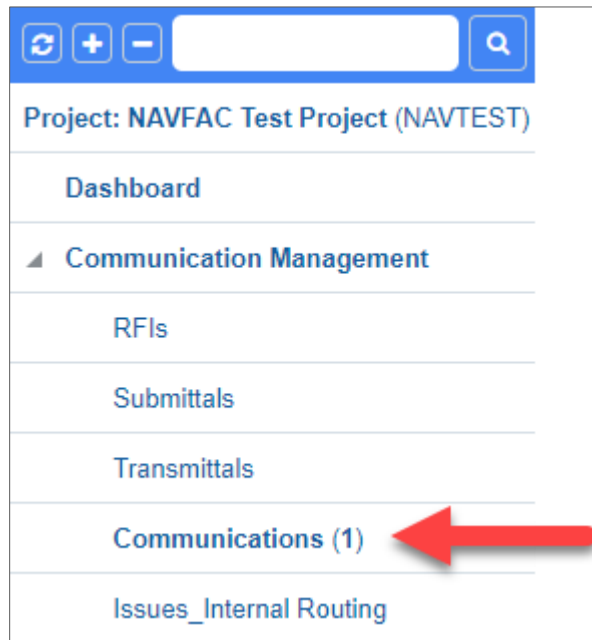
 Check Spelling	 Send I/O Email	 Save	 <b>Submit</b>	 Cancel
--	--	--	---	--

This will send the **Communication** to the recipient and add the due date to their **My Actions** and **Calendar**.

To add a **Communication** through the **Related Objects** tab of an application, see **Section 3.2.3.2** and select **Communication**. Then follow the instructions in this section.

### 3.3.3 Responding to Communications

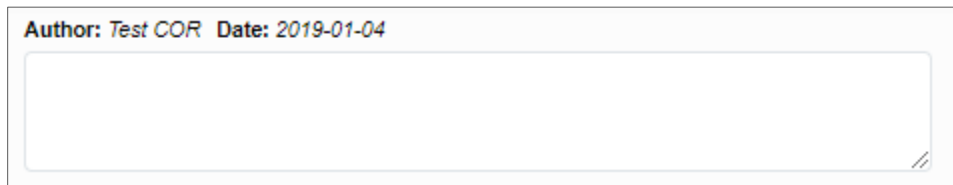
When the recipient opens the project in eCMS, they will see any new communications bolded in the **Communications** folder.



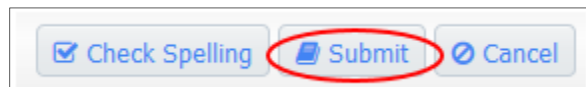
The recipient can then open the **Communication**, and respond by clicking **Respond** in the top, right of the screen.



A small box will appear at the bottom of the screen for the recipient to add their response.

A screenshot of the response input area. At the top, it says 'Author: Test COR Date: 2019-01-04'. Below this is a large, empty text area for entering the response.

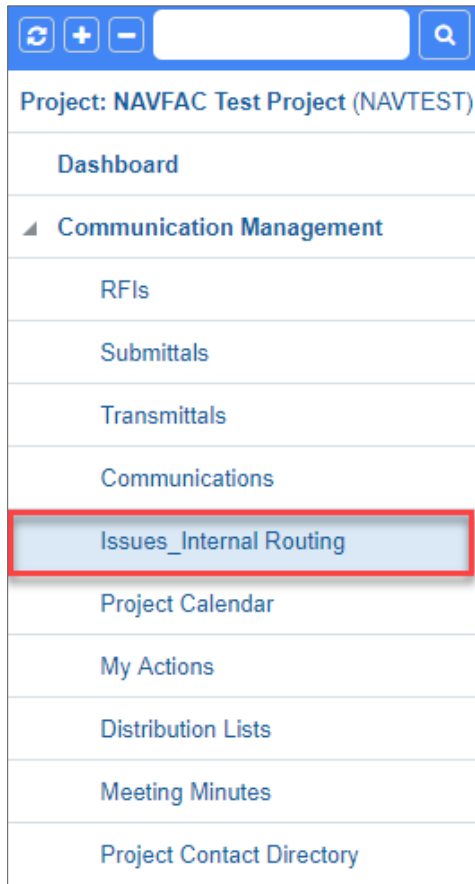
After the response has been added, click **Submit** in the top, right of the screen.



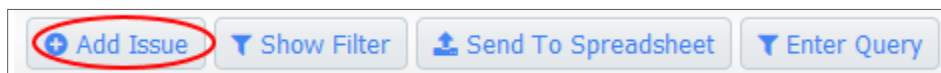


### 3.3.4 Adding Issues\_ Internal Routing

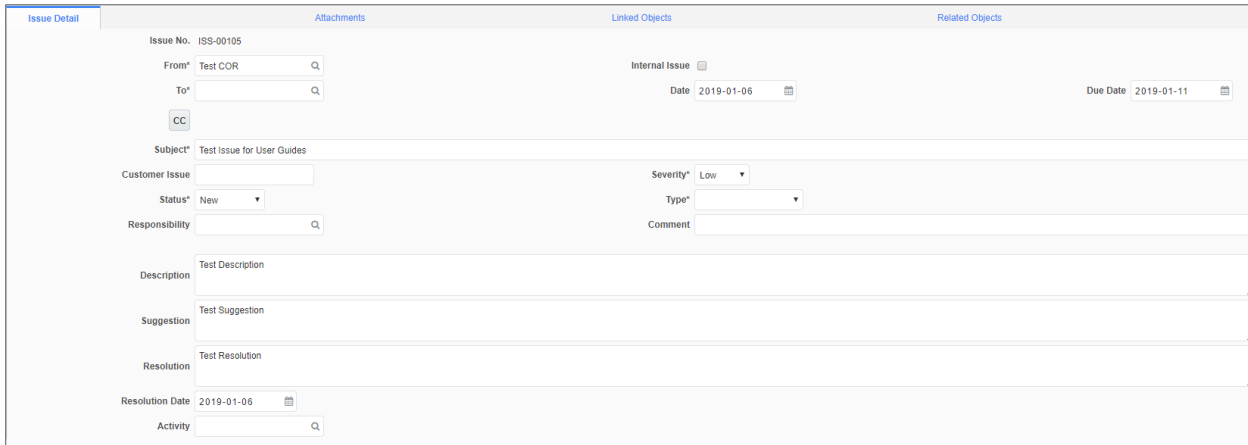
**Issues/Internal Routing (IR)** can be used to document potential problems that may result in a project change, to communication technical information or reports, and to link concerns to specific RFIs or Submittals. There are two ways to create an **IR** record. Enter the **IR** directly through the **Navigation Pane** or use the **Related Objects** tab of an **RFI**. Starting in the **Navigation Pane** of the project, open the **Internal Routing** folder.



This will pull up a list of existing communications regarding this RFI. At the top, right of the screen, select **Add Issue**.



In the **Issue Detail** screen that appears, complete the required fields.



Below is a brief description of each field:

**Issue No.** – This field generates a number automatically to organize **IRs**.

Issue No. ISS-00105

**From** – This field will contain the sender's name.

From\* Test COR

**To** – Using the dropdown menu, select the team member to receive this **IR**.

To\*

**Date** – The date the **IR** is created.

Date 2019-01-06

**Due Date** – Using the calendar icon next to this field, select the response deadline for the recipient.

Due Date 2019-01-11

**CC** – Use this button to copy additional people into the message. They are unable to respond, but can view all comments.

CC

**Subject** – Enter a short, descriptive title to give a synopsis of the message.

Subject\* Test Issue for User Guides

**Customer Issue** – Leave this field blank

Customer Issue

**Severity** – Choose the **Severity** of the Issue.  
 Use Wishlist if it is something that would make things easier, but the job can be done without it.

Severity\* Low ▼

- Wishlist
- Low
- Normal
- High
- Critical

**Status** – The **Status** will default to **New** when created. If updating an IR record, change the status to **Open**, **In Progress**, or **Closed**.

Status\* New ▼

- Closed
- In Progress
- New
- Open

**Type** – Using the dropdown, select the **Type** that best describes the IR.

Type\* ▼

- Design Issue
- Documentation Issue
- Feedback
- Materials Issue
- Question
- Regulations
- Submittal Review
- Supplier
- Technical Issues
- To Be Determined

**Responsibility** – Use the dropdown to select the person responsible for managing this IR task

Responsibility  Q

**Comment** – Used to provide additional information or thoughts

Comment

**Description** – Describe the IR issue and tasks

Description

**Suggestion** – Respondent to make suggestions in this field if IR is not ready to be resolved

Suggestion

**Resolution** – Once a decision has been made, and the IR is resolved, enter the final resolution in this field.

<b>Resolution</b>	<input type="text"/>
-------------------	----------------------

**Resolution Date** – Select the calendar icon next to this field to enter the date this issue was officially resolved

<b>Resolution Date</b>	<input type="text" value=""/>
------------------------	-------------------------------

**Activity** – If applicable, select an **Activity** that the Issue is related to.

<b>Activity</b>	<input type="text" value=""/>
-----------------	-------------------------------

After completing all of the required fields, if you need to save the **IR** as a draft, select **Save** on the upper-right corner. If the **IR** is ready to be submitted, click **Submit**.

Check Spelling	Send I/O Email	Save	Submit	Cancel
----------------	----------------	------	--------	--------

This will send the **IR** to the recipient and add the due date to their **My Actions** and **Calendar**.

To add an **IR** through the **Related Objects** tab of an RFI, see **Section 3.2.3.2** and select **Issue**. Then follow the instructions in this section.

### 3.3.4.1 Responding to Internal Routing Requests

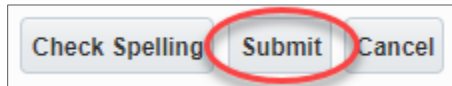
When the recipient opens the project in eCMS, they will see the new **Internal Routing** task bolded in the **Internal Routing** folder. The recipient can then open the **IR**, and respond by clicking **Add Note** in the top, right of the screen.

Add Issue	Copy	Send I/O Email	Edit	Delete	Add Note	Print	Quick Print	Back To Log
-----------	------	----------------	------	--------	----------	-------	-------------	-------------

Selecting **Add Note** will open a small box at the bottom of the screen for the recipient to add their response.

<b>Author:</b> Test COR	<b>Date</b>	
<input type="text"/>		
Check Spelling	Submit	Cancel

After the response has been added, click **Submit** in the top, right of the screen.



### 3.3.5 *Sorting Data*

Select the **Communications or Internal Routing** button in the navigation bar on the left side of the screen to pull up a list of all Communications or IRs (See **Section 3.3.2** for reference).

From here, see **Section 3.2.5** on how to use each sorting method.

## 3.4. Project Calendar

### 3.4.1 *Purpose*

The Project Calendar is your resource for tracking the date RFIs and Submittals were received, their due date, and any Action Items or Issue requests received and due. This lesson will cover:

- Accessing your Project Calendar
- Setting your calendar preferences
- Adding Action Items to your calendar

To access the Project Calendar, go to the Navigation Pane on the left side of the screen, open the Communication Management folder and select **Project Calendar**.

Project: NAVFAC Test Project (NAVTEST)

- Dashboard
- Communication Management
  - RFIs
  - Submittals
  - Transmittals
  - Communications
  - Issues\_Internal Routing
  - Project Calendar**
  - My Actions
  - Distribution Lists
  - Meeting Minutes
  - Project Contact Directory

The Project Calendar for the current month will appear. Navigate between Month, Week, Day, and All views by selecting the tabs at the top of the Calendar.

**Monthly Calendar** January 2019

Month Week Day All

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Week 1	Dec 30 Add	Dec 31 Add	Jan 01 Add	Jan 02 Add	Jan 03 Add	Jan 04 Add	Jan 05 Add
Week 2	Jan 06 Add	Jan 07 Add	Jan 08 Add	Jan 09 Add	Jan 10 Add	Jan 11 Add	Jan 12 Add
Week 3	Jan 13 Add	Jan 14 Add	Jan 15 Add	Jan 16 Add	Jan 17 Add	Jan 18 Add	Jan 19 Add
Week 4	Jan 20 Add	Jan 21 Add	Jan 22 Add	Jan 23 Add	Jan 24 Add	Jan 25 Add	Jan 26 Add
Week 5	Jan 27 Add	Jan 28 Add	Jan 29 Add	Jan 30 Add	Jan 31 Add	Feb 01 Add	Feb 02 Add

Edit Preferences to change visibility or add holidays by selecting the link in the top, right corner of the screen. A new popup will appear.

Outlook Import/Export
 Add Action Item
 **Edit Preferences**

**Calendar Preferences**
Save
Close

CALENDAR PREFERENCES

Holidays ☒
 My Schedule ☒
 Show My Closed Action Items ☒

Project Calendar ☒
 Others' Schedules ☒

Restrict to Company or Business Partner

Restrict to Contact

Note that *Project Calendar* hides personal and shared action items when it is selected and a project has been specified.  
[Share your public action items with other users.](#)

From this screen, users will be able to add holidays to their project calendar, see other team members' schedules, hide or view their own calendar or closed action items, and see the entire project calendar.

In the data fields for **Restrict to Company or Business Partner**, choose a company to hide the action items from. For instance, to only see action items for NAVFAC and the Architecture/Engineer contractor, you could restrict the General Contractor's company to hide their action items.

If you want to restrict a certain person's action items, you may select them from the dropdown menu next to the **Restrict to Contact** data field.

### 3.4.2 Adding Action Items to Calendar

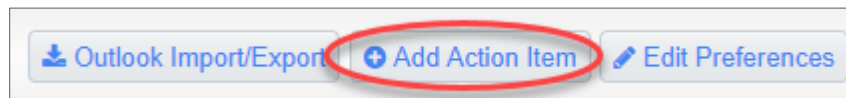
When a user creates an RFI, Submittal, Communication, or Issue, eCMS automatically adds the due date to the calendar of the person assigned to the task as shown in the example below.

Monthly Calendar

January2019

Month	Week	Day	All																
January 2019																			
Sun	Mon	Tue	Wed	Thu	Fri	Sat													
Dec 30	Add	Dec 31	Add	Jan 01	Add	Jan 02	Add	Jan 03	Add	Jan 04	Add	Jan 05	Add						
Week 1	12:00am - 12:00am Request For Information-ZZ-ACME-00070																		
Jan 06	Add	Jan 07	Add	Jan 08	Add	Jan 09	Add	Jan 10	Add	Jan 11	Add	Jan 12	Add						
Week 2	12:00am - 12:00am Request For Information-ZZ-ACME-00063													12:00am - 12:00am Request For Information-ZZ-ACME-00065	12:00am - 12:00am Request For Information-ZZ-ACME-00058				
Jan 13	Add	Jan 14	Add	Jan 15	Add	Jan 16	Add	Jan 17	Add	Jan 18	Add	Jan 19	Add						
Week 3	12:00am - 12:00am Request For Information-ZZ-ACME-00069													12:00am - 12:00am Request For Information-ZZ-ACME-00071	12:00am - 12:00am Request For Information-ZZ-ACME-00073	12:00am - 12:00am Request For Information-ZZ-ACME-00074	12:00am - 12:00am Request For Information-ZZ-ACME-00075	12:00am - 12:00am Request For Information-ZZ-ACME-00062	
Jan 20	Add	Jan 21	Add	Jan 22	Add	Jan 23	Add	Jan 24	Add	Jan 25	Add	Jan 26	Add						
Week 4	12:00am - 12:00am Request For Information-ZZ-ACME-00076													12:00am - 12:00am Request For Information-ZZ-ACME-00077	12:00am - 12:00am Request For Information-ZZ-ACME-00079	12:00am - 12:00am Request For Information-ZZ-ACME-00080	12:00am - 12:00am Request For Information-ZZ-ACME-00081	12:00am - 12:00am Request For Information-ZZ-ACME-00082	12:00am - 12:00am Request For Information-ZZ-ACME-00083
Jan 27	Add	Jan 28	Add	Jan 29	Add	Jan 30	Add	Jan 31	Add	Feb 01	Add	Feb 02	Add						
Week 5	12:00am - 12:00am Request For Information-ZZ-ACME-00066																		

To add events and reminders to your own calendar, select **Add Action Item** from the top, right of the screen.



There is a button for **Outlook Import/Export** at the top, right of the screen. Currently, this functionality has been disabled and you will not be able to use this feature.

Once the “Add Action Item” screen appears, complete the form to add an action item to your calendar or someone on your team.



**ADD ACTION ITEM**

Type\* ☒ Shared ☐ Private ☐ Public

For \* Test COR

Action Code\*

Start Date\* 2019-01-07

Time  :  am

Title\*

Description

Partner

Project NAVFAC Test Project

Completion Note

Recurrence ☐ Recurring Item

Alert Date

Status

Duration 1

End Time  :  am

Urgency

Contact

Completed Date

Alert Time  :  am

**Type** – Select the button to display if this action item is shared with a specific team, private (only displayed for creator), or public to the entire project team.

Type\* ☒ Shared ☐ Private ☐ Public

**For** – Use the dropdown to select the responsible person

For \* Test COR

**Action Code** – This field can be left as is

Action Code\*

**Start Date** – Date the action item is assigned

Start Date\* 2019-01-07

**Time** – Time the action item is assigned

Time  :  am

**Title** – Title of the action item

Title\*

**Description** – Description of required tasks

Description

**Partner** – Use the dropdown menu to select if there is a partner organization working on this action item.

Partner

**Project** – The project field will be filled in with the project being viewed.

Project NAVFAC Test Project

**Completion Note** – Any notes after the action item is complete for documentation

Completion Note

**Recurrence** – Use this function to set up a recurring action item. When selected, additional fields will appear that allow the user to set daily, weekly, monthly, or yearly recurrence.

Recurrence ☐ Recurring Item

**Alert Date** – Set an alert for the action item

Alert Date  

**Status** – Use the dropdown menu to select the status of the action item.

Status  

**Duration** – This field is not required.

Duration

**End Time** – Time when action item is completed.

End Time  :  am

**Urgency** – Using the dropdown menu next to the field, set the urgency of the action item. Your options are **Deferred, High, Low, Ongoing, Pending, Urgent, or To Be Determined.**

Urgency  

**Contact** – Use the dropdown to select the contact for this action item. A list of all project team members will appear.

Contact  

**Completed Date** – The date the action item is completed.

Completed Date  

**Alert Time** – Set a time to receive an alert.

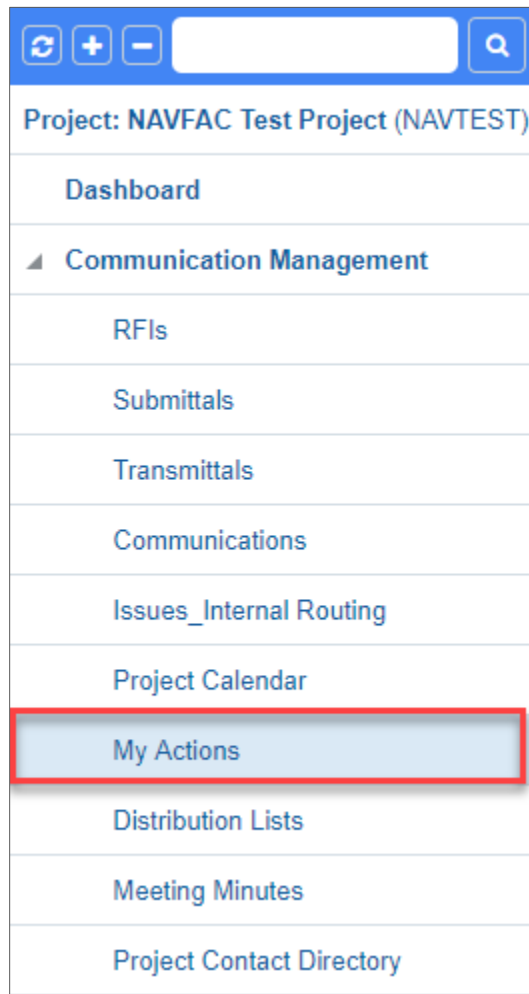
Alert Time  :  am

If this Action Item is a recurring action, check the box next to Recurring Item. This will open additional fields allowing you to set daily, weekly, monthly, or yearly recurrence.

After completing the form, click “Save” in the top, right of the pop-up screen. The action item will now appear on the project calendar.

## 3.5. My Actions

**My Actions** are a list of upcoming due dates for RFIs, Submittals, Action Items, Communications, and Issues or Internal Routing tasks. Find the **My Actions** section of a project under the **Communication Management** folder in the **Navigation Pane** on the left side of the screen.



This will pull up a list of your action items organized by date.

MY ACTIONS			
NAVFAC Test Project			
ITEMS			GROUP BY TYPE
Overdue (64)			
Today (0)			
No Actions			
Tomorrow (1)			
2019-01-08	Request For Information	ZZ-ACME-00063	
This Week (3)			
2019-01-10	Request For Information	ZZ-ACME-00065	
2019-01-14	Request For Information	ZZ-ACME-00069	
2019-01-15	Request For Information	ZZ-ACME-00071	Finish selection
Following Week (3)			
Next 30 Days (5)			
2019-01-24	Request For Information	ZZ-ACME-00076	Test RFI
2019-01-25	Request For Information	ZZ-ACME-00080	
2019-01-25	Request For Information	ZZ-ACME-00083	
2019-01-25	Request For Information	ZZ-ACME-00081	
2019-01-25	Request For Information	ZZ-ACME-00082	

To view tasks by type, click on the “Group By Type” link on the header bar. The list will then be reorganized by type.

MY ACTIONS

NAVFAC Test Project

ITEMS

GROUP BY DATE

Issue (8)

2018-02-26

ISS-00004

Testing Ball in Court

2018-05-10

ISS-00047

2018-05-18

ISS-00053

2018-05-21

ISS-00054

2018-05-23

ISS-00050

Submittal #111

2018-05-28

ISS-00048

Submittal 109

2018-05-31

ISS-00059

2018-10-17

ISS-00092

Test

Meeting (1)

2018-04-27

12345

Notice (1)

2018-02-14

NOT-00001

Test notice process flow

## 3.6. Distribution Lists

### 3.6.1 Purpose

Create **Distribution Lists** to quickly group team members together and add them to **Communications**, **RFIs**, and **Action Items** with the click of a button. A **Distribution List** is just a group of people organized under a similar goal. **Distribution Lists** can be found under **Communication Management**.



Project: NAVFAC Test Project (NAVTEST)

- Dashboard
- Communication Management
  - RFIs
  - Submittals
  - Transmittals
  - Communications
  - Issues\_Internal Routing
  - Project Calendar
  - My Actions
  - Distribution Lists**
  - Meeting Minutes
  - Project Contact Directory

### 3.6.2 Creating a New Distribution List

Navigate to the **Distribution Lists** page. In the right corner, select **New**.

DISTRIBUTION LIST

Create a **Code** and a **Description** for the new **Distribution List**. The **Code** should be short, and easy to understand. For instance, to create a **Distribution List** of Architects, the **Code** could be "ARCH" and the **Description** would be "Architects". Click **Save**.

DISTRIBUTION LIST

Code\*

Description\*

To add team members to a **Distribution List**, highlight the list and click **Add** in the **Contacts** section of the screen.

CONTACTS <span style="float: right;">➔ ADD</span>				
Partner Code	Partner Name	Contact Code	Contact Name	Action
NAVPAR01	NAVFAC Partner	TESTCICM	Test CM	<input type="checkbox"/>
ARCENG01	Architectural Engineer	TEST_AE	Test AE	<input type="checkbox"/>
ZZ-ACME	ZZ-Acme Supply	TESTKTRSSH	KTR SSHO	<input type="checkbox"/>
NAVPAR01	NAVFAC Partner	TESTCIPM	Test PM	<input type="checkbox"/>
NAVPAR01	NAVFAC Partner	TESTCIPME	TEST PME	<input type="checkbox"/>


A popup will appear with a list of project team members. Select the team members that belong in the **Distribution List** by checking the box next to their name and selecting **Accept**.

### 3.6.3 Using Distribution Lists within the System

Find:  %    Selected 2

TESTCICOR	Test COR	NAVPAR01	NAVFAC Partner	<input checked="" type="checkbox"/>
TESTCIDM	Test DM	NAVPAR01	NAVFAC Partner	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

When accessing other sections of the eCMS system, such as **RFIs**, **Communications**, or **Internal Routing**, there is a **CC** section. When selecting a user to CC, select **Distribution Lists**.

Find: %  **Accept**

◀ Prev Set 1 - 42 of 42 ▶ Next Set ▶

● Project Contacts ● **Distribution Lists**

Contact Name	Contact Code	Partner Name	Partner Code	
<b>Test Users</b>				
Test CM	TESTCICM	NAVFAC Partner	NAVPAR01	<input checked="" type="checkbox"/>
Test DM	TESTCIDM	NAVFAC Partner	NAVPAR01	<input checked="" type="checkbox"/>

**NOTE:** Using the **CC** function or **Distribution Lists** will allow the selected group of people to view the information, but will not add the information to their calendars or action items.

## 3.7. Meeting Minutes

### 3.7.1 Purpose

Track **Meeting Minutes** in the eCMS system to document discussions and create action items attached to a project. Find the **Meeting Minutes** folder in the **Navigation Pane** on the left side of the screen listed under the **Communications Management** folder.



Project: NAVFAC Test Project (NAVTEST)

Dashboard

Communication Management

RFIs

Submittals

Transmittals

Communications

Issues\_Internal Routing

Project Calendar

My Actions

Distribution Lists

**Meeting Minutes**

Project Contact Directory

### 3.7.2 Add a Meeting

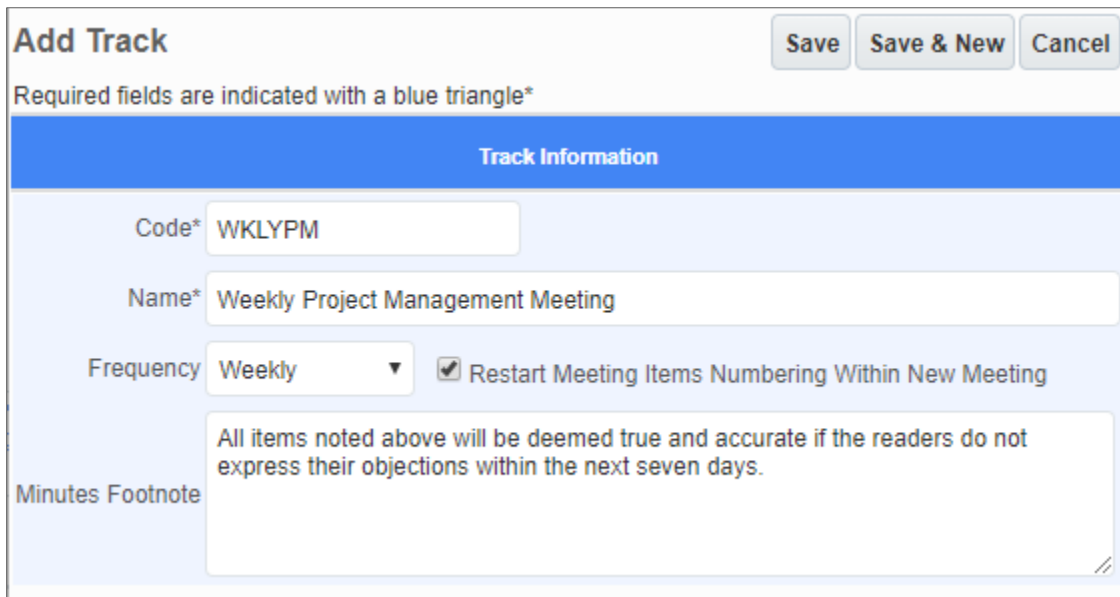
To modify an existing meeting, select it from the list on the screen. If you want to create a new meeting, select “Add Meeting” in the top, right corner of the screen. This will open a new screen called “Meeting Information.”

MEETING MINUTES (FILTERED)								
Track Code	Track name	Meeting No.	Subject	Meeting Date	Location	End Date	Next Meeting Date	Attachments
BUDG	Budget	BM000003	Meeting Minute 062018	2018-07-04		2018-07-04	2018-07-11	
CHS	Construction Progress Meeting	0001	Review the Env Plan	2018-03-29	Bldg 3, PW Conf Room	2018-03-29	2018-04-29	
ENV	Environmental Meeting	0001	Review the Env Plan	2018-03-29	Bldg 3, PW Conf Room	2018-03-29	2018-04-29	
PM	Project Management	0001	Weekly PM Meeting	2018-03-23	Big Conference Room or by Telephone	2018-03-23	2018-03-30	
PM	Project Management	0001	Weekly PM Meeting	2018-03-23	Big Conference Room or by Telephone	2018-03-23	2018-03-30	
PM	Project Management	0001	Weekly PM Meeting	2018-03-23	Big Conference Room or by Telephone	2018-03-23	2018-03-30	
TEST	Test	0001	Test	2018-03-02	Test	2018-03-02	2018-04-02	
TEST	Test	0001	Test	2018-03-02	Test	2018-03-02	2018-04-02	
Total (9 rows)								

The first field you will see is “Topic.” Topics will vary by project and are the most logical groups to organize information. You can choose to use an existing “Topic” or create a new one. If this is the first time scheduling a meeting on the project, you will most likely have to create new topics. Choose an existing “Topic” by selecting the dropdown menu and selecting the topic. To create a new topic, click the plus sign next to the field.






A form field labeled "Topic\*" with a search icon and a plus sign button.

If you choose to add a topic, a new popup will appear. The first field you will see is “Code.” The Code can be anything you choose, up to ten characters. For example, if you are scheduling a weekly project management meeting, the code could be WKLYPM. After completing all fields, click “Save.”

A screenshot of the "Add Track" popup form. It has a title bar "Add Track" with "Save", "Save & New", and "Cancel" buttons. Below the title bar is a note: "Required fields are indicated with a blue triangle\*". The form is divided into sections. The first section, "Track Information", contains fields for "Code\*" (with value "WKLYPM"), "Name\*" (with value "Weekly Project Management Meeting"), and "Frequency" (with value "Weekly" and a dropdown arrow). There is also a checkbox labeled "Restart Meeting Items Numbering Within New Meeting" which is checked. The second section, "Minutes Footnote", contains a text area with the text: "All items noted above will be deemed true and accurate if the readers do not express their objections within the next seven days." There is a small icon in the bottom right corner of the text area.









You can now open the dropdown next to “Topic” and select the topic you just created. You can then create a Subject for the meetings, Set the start date and times, schedule a reminder to go out to attendees, and write the location and purpose of the meeting. Save the Meeting if you are ready to add attendees, or Save a Draft if you need to gather additional information.

Once you save, the screen will show “Not Submitted” at the top. You can return to this meeting and make updates at any time. Just click the “Edit,” button to add Agendas, Attendees, Next Meeting Info, Notes, or Attachments.

MEETING INFORMATION			
Topic*	Weekly Project Management 		
Subject*	Weekly Project Management Meeting		
Meeting Date*	2019-01-14 	Start	10 : 00 AM 
Entered By	KTR PM		
Reminder Date	2019-01-11 	End	11 : 00 AM 
Location	Conference Room		
Purpose	Updates to PMP		

### 3.7.3 Agenda

To add agenda items, click on the “Agenda” tab on the screen. Create an item number, select or create a topic for the agenda item. For this example, the agenda item relates to the budget, and will be categorized as a “Budget” topic. In the “Name” data field, be more specific regarding what this agenda item is about. For instance, this item is about Overtime. You can select a person to be responsible for tracking this item, and in the minute field, write what was discussed in the meeting. If you schedule a due date, it will show up on the Project Calendar and My Actions list of the person responsible.

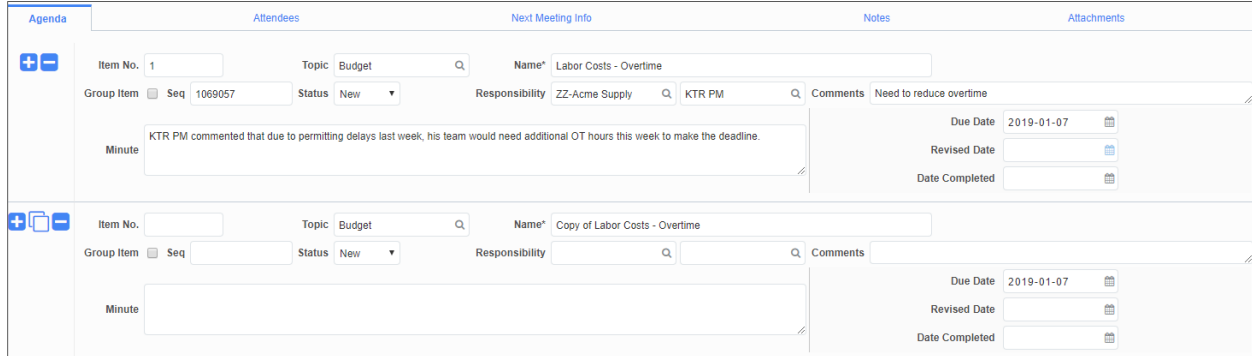
Agenda		Attendees	Next Meeting Info	Notes	Attachments
	Item No. 1	Topic Budget 	Name Labor Costs - Overtime		
Group Item	Seq 1069057	Status New 	Responsibility ZZ-Acme Supply 	KTR PM 	Comments Need to reduce overtime
Minute	KTR PM commented that due to permitting delays last week, his team would need additional OT hours this week to make the deadline.				Due Date 2019-01-07  Revised Date  Date Completed 

Click **Save**. If you want to add a note to an agenda item, or mark an item as complete, you can do that with the icons that appear on the side of the item.



### 3.7.3.1 Copy Agenda Items

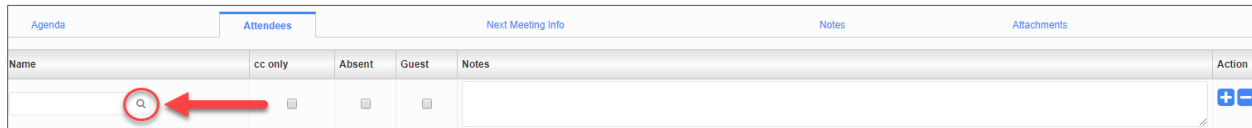
Once Agenda Items are created, you can copy them to save time. To do this, click on the blue plus sign to create a new Agenda Item, then click on the icon to the left of the new item that looks like two pieces of paper. This will copy the agenda item above it, so you can add different discussions or action items from a meeting. Don't forget to save after each item is created.



Agenda	Attendees	Next Meeting Info	Notes	Attachments
<div> <div>+</div> <div>-</div> </div> <div> <div>Item No.</div> <div>1</div> </div> <div> <div>Topic</div> <div>Budget</div> </div> <div> <div>Name*</div> <div>Labor Costs - Overtime</div> </div> <div> <div>Group Item</div> <div>Seq</div> <div>1069057</div> </div> <div> <div>Status</div> <div>New</div> </div> <div> <div>Responsibility</div> <div>ZZ-Acme Supply</div> </div> <div> <div>KTR PM</div> </div> <div> <div>Comments</div> <div>Need to reduce overtime</div> </div> <div> <div>Minute</div> <div>KTR PM commented that due to permitting delays last week, his team would need additional OT hours this week to make the deadline.</div> </div> <div> <div>Due Date</div> <div>2019-01-07</div> </div> <div> <div>Revised Date</div> <div></div> </div> <div> <div>Date Completed</div> <div></div> </div>				
<div> <div>+</div> <div>-</div> <div>📄</div> </div> <div> <div>Item No.</div> <div></div> </div> <div> <div>Topic</div> <div>Budget</div> </div> <div> <div>Name*</div> <div>Copy of Labor Costs - Overtime</div> </div> <div> <div>Group Item</div> <div>Seq</div> <div></div> </div> <div> <div>Status</div> <div>New</div> </div> <div> <div>Responsibility</div> <div></div> </div> <div> <div>Comments</div> <div></div> </div> <div> <div>Minute</div> <div></div> </div> <div> <div>Due Date</div> <div>2019-01-07</div> </div> <div> <div>Revised Date</div> <div></div> </div> <div> <div>Date Completed</div> <div></div> </div>				

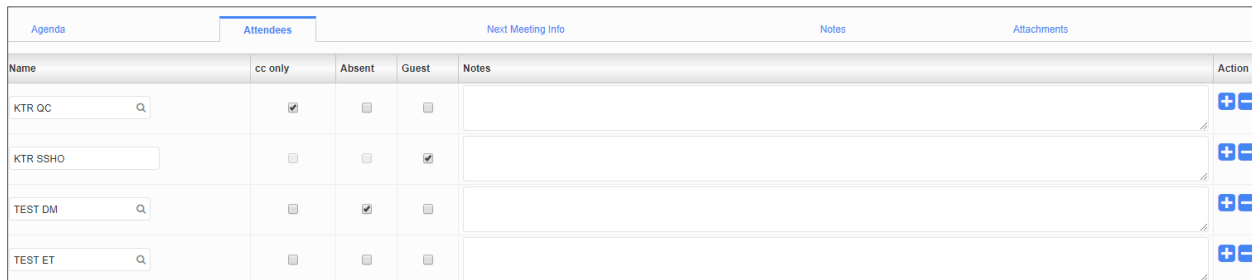
### 3.7.4 Add Attendees

Add everyone invited to the meeting and record their attendance. Click the blue plus sign underneath the Action column. This opens the row for adding team members. Click the magnifying glass icon under the "Name" column.



Agenda	Attendees	Next Meeting Info	Notes	Attachments
Name	cc only	Absent	Guest	Action
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>

A popup will appear with everyone currently assigned to the project. Select the team members that attended or were invited to this meeting and click "Accept." Save.







Agenda	Attendees	Next Meeting Info	Notes	Attachments
Name	cc only	Absent	Guest	Action
KTR OC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>
KTR SSHO	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>
TEST DM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>
TEST ET	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="+"/>

### 3.7.5 Next Meeting Info

This section will display if a related meeting is scheduled. Click on the **Next Meeting Info** tab on the **Meeting Detail** screen.

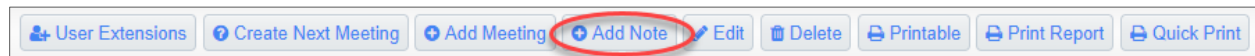
---

Agenda	Attendees	Next Meeting Info	Notes	Attachments
<div>Date* 2019-01-21 </div> <div>Time 10 : 00 AM </div> <div>Subject* Weekly Project Management Meeting</div> <div>Location Conference Room</div> <div>Reminder Date * 2019-01-18 </div> <div>Comments </div>				

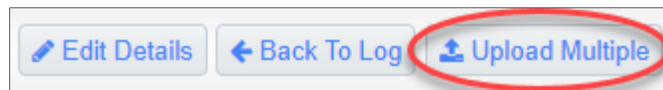
### 3.7.6 Notes and Attachments

The last two tabs are “Notes” and “Attachments.” If you want to add notes or attachments, click on the tab, and then go to the top of the screen.

For notes, click **Add Note**.



For Attachments, click **Upload Multiple** to upload a single or multiple attachment.



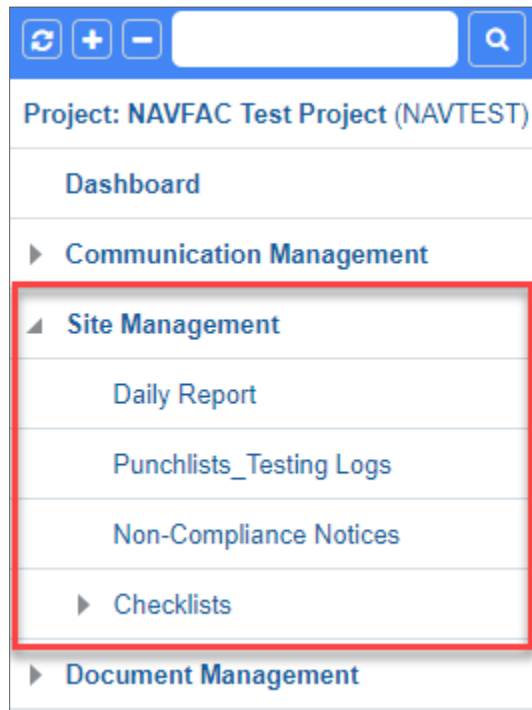
Once you have added all of the information to your meeting, click the **Submit** button at the top of the screen. You can return to this meeting at any time by using the Communications Management folder in the navigation pane.

## 4. SITE MANAGEMENT

### 4.1. Background

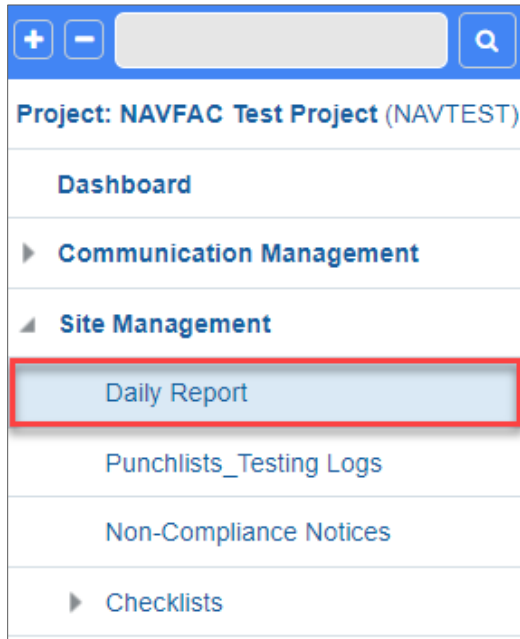
The Site Management section contains Daily Reports, Punchlists, and Checklists that serve as deliverables KTRs give to NAVFAC. Site Management also contains Non-Compliance Notices, which the government can issue to KTRs. These features allow KTRs to easily add, track, and update deliverables within the project.

Use the **Navigation Pane** on the left side of the screen under the **Site Management** folder to find the following folders.



### 4.2. Daily Reports

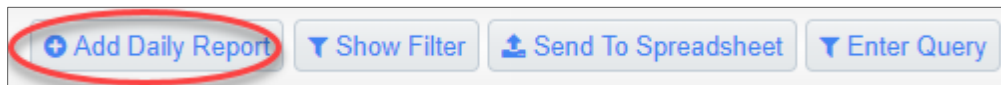
**Daily Reports** offer an easy place to keep track of safety, material, and labor on a project. To access **Daily Reports**, go to the **Navigation Pane**, select **Site Management**, and then **Daily Report**. The following section details how a Daily Report is created by the KTR.



Project: NAVFAC Test Project (NAVTEST)

- Dashboard
- Communication Management
- Site Management
  - Daily Report**
  - Punchlists\_Testing Logs
  - Non-Compliance Notices
- Checklists

This will open a screen to start the **Daily Report**. This will open the Daily Report Log where you can view all Daily Reports submitted for this project. Click **Add Daily Report** from the top, right corner to create a new report.

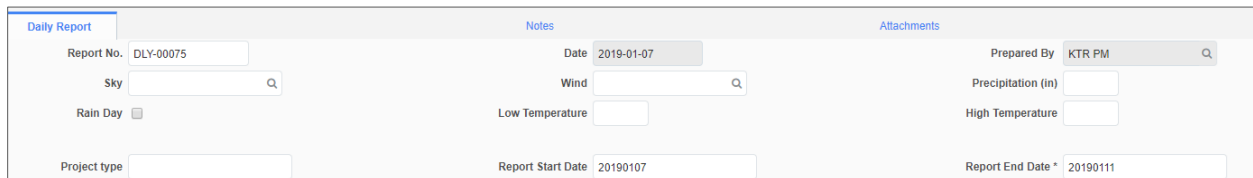


[+ Add Daily Report](#)
[Show Filter](#)
[Send To Spreadsheet](#)
[Enter Query](#)

## 4.2.1 Information in a Daily Report

### 4.2.1.1 Report Identifiers

At the top of each new report is a screen to collect information identifying the report, the date, conditions on-site, and the crew and project manager working.



Daily Report: Report No. DLY-00075, Date 2019-01-07, Sky, Wind, Rain Day, Low Temperature, Project type, Report Start Date 20190107, Report End Date 20190111.

#### Report No.

The **Report No.** is filled in automatically.

Report No. DLY-00075

#### Date

The **Date** is also automatically filled in with the day the report is created.

Date 2019-01-07

**Prepared By**

The **Prepared By** section shows the name of the user creating the report.

Prepared By KTR PM

**Sky**

Use the dropdown (magnifying glass icon) to select the sky conditions for the day.

Sky

**Wind**

Use the dropdown (magnifying glass icon) to select the wind conditions for the day.

Wind

**Precipitation (in)**

Log total precipitation for the day in inches.

Precipitation (in)

**Rain Day**

Select this button if there is rain.

Rain Day ☐

**Low Temperature (F)**

Enter the minimum temperature for the day.

Low Temperature

**High Temperature (F)**

Enter the maximum temperature for the day.

High Temperature

**Project Type**

Use the box in this field to type if this is a Construction Project (CON) or Facilities Services Project (FSC).

Project type

**Report Start Date**

The Report Start and End Dates can be used when a Daily Report is being submitted for a date range or date that is not the day the report is created.

Report Start Date 20190107

**Report End Date**

If the report is created on the same day it is covering, just enter the date in this field.

Report End Date \* 20190111

**Submitted By**

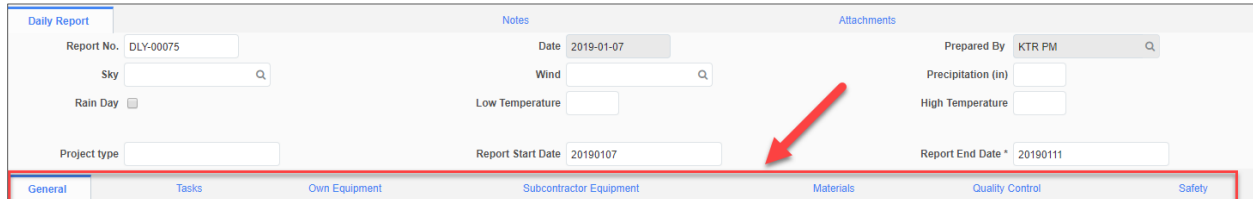
This is a field that displays after Daily Report is submitted. It displays the user that submitted the Daily Report.

Submitted\_By Test COR



#### 4.2.1.2 Daily Report Tabs

After completing the **Report Identifiers** at the top of the **Daily Report**, users will see a list of tabs available to complete different sections of the report.



The screenshot displays the 'Daily Report' form interface. At the top, there are three tabs: 'Daily Report' (selected), 'Notes', and 'Attachments'. Below these, the form is organized into three columns. The left column contains 'Report No.' (DLY-00075), 'Sky' (with a search icon), 'Rain Day' (checkbox), and 'Project type'. The middle column contains 'Date' (2019-01-07), 'Wind' (with a search icon), 'Low Temperature', 'Report Start Date' (20190107), and 'Report End Date \*' (20190111). The right column contains 'Prepared By' (KTR PM with a search icon), 'Precipitation (in)', 'High Temperature', and 'Report End Date \*'. A red arrow points to the 'Materials' tab in the bottom navigation bar. The bottom navigation bar includes tabs for 'General', 'Tasks', 'Own Equipment', 'Subcontractor Equipment', 'Materials', 'Quality Control', and 'Safety'.

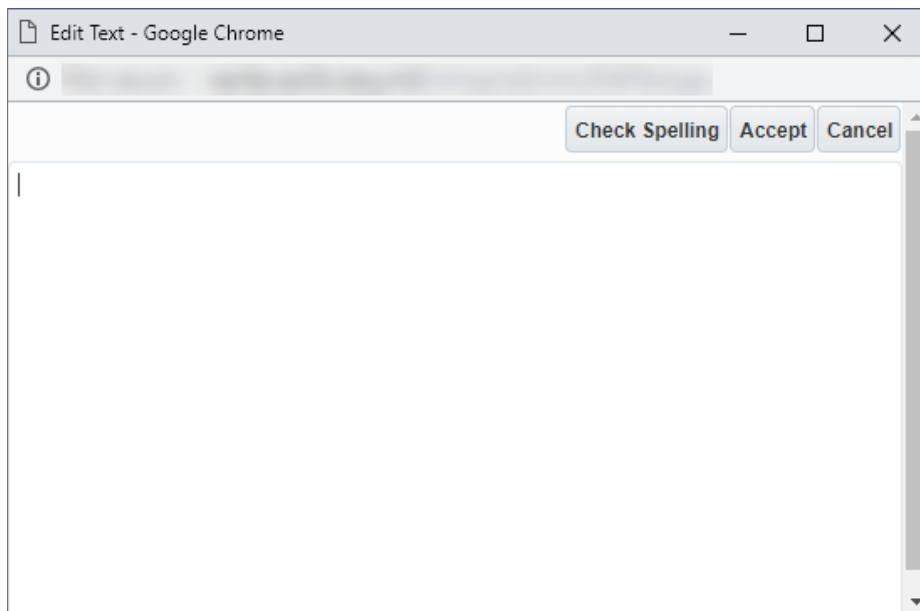
When selected, each tab will open a screen with different sections of a **Daily Report**. The fields in each screen can be completed at the office or in the field on a portable tablet device.

## General Tab

Under the **General Tab**, there are seven open-answer fields to start the report. Users may log information with 4,000 characters or less for the following areas:

- Activities
- Work Performed Today
- Problems or Delays
- Subcontractor Progress
- Special Assignments
- Potential Changes
- Incidents on Site

To answer each section, either click in the box and start writing, or double click the box to expand into a larger field. When expanded, users will have the option to check spelling before entering their information.



## Task

Tasks can keep track of the daily workload, number of staff assigned to a project, the man-hours worked on each team, and any notes.

To create a new line, click on the blue plus sign under the **Action** column.

General		Tasks
Action	Company	Contract
<div>+</div> <div>-</div> <div>+</div>	<input type="text" value="Subcontractor"/> <input type="button" value="Q"/>	<input type="text" value="ABC Co"/>

For each new line created, add the **Company**, the **Contractor**, and the **Trade**, for which you are tracking manhours. The company will be the General Prime Contractor, the Architectural Engineering Firm, NAVFAC, or a generic Subcontractor. Subcontractors are not anticipated to have access to eCMS, and therefore, won't be entered into the system. However, you can select Subcontractor as the Company and enter the name of the Subcontractor in the Contractor/Employer field to track their hours.

General		Tasks	Own Equipment
Action	Company	Contractor/Employer	Trades
<div>+</div> <div>-</div> <div>+</div>	<input type="text" value="Subcontractor"/> <input type="button" value="Q"/>	<input type="text" value="ABC Co."/>	<input type="text" value="Carpenter"/> <input type="button" value="Q"/>

Use the magnifying glass icon to open the list of trades to select the trade you are tracking hours for.

General		Tasks	Own Equipment
Action	Company	Contractor/Employer	Trades
<div> <div>+</div> <div>-</div> </div> <div>+</div>	<input type="text" value="Subcontractor"/> <input type="button" value="Q"/>	<input type="text" value="ABC Co."/>	<input type="text" value="Carpenter"/> <input type="button" value="Q"/>

Enter the date in MM/DD/YYYY format in the **Work Date** column. Then you can enter numeric values for **Number of Workers**, **Man-Hours**, **Overtime Hours**, and **Double Overtime Hours**. The Daily Man-Hours field will calculate the total hours worked by all workers. The total of all Daily Reports on the project is calculated in the table below.


	Work Date	No. of Workers	Man-Hours	OT Hours	DOT Hours	Daily Man-Hours
<input type="button" value="Q"/>	<input type="text" value="01/"/>	<input type="text" value="3"/>	<input type="text" value="8"/>	<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="30"/>
Total						
Total as of Report Date		126	205	23	0	1126
Project Total		126	205	23	0	1126

If you imported the **Schedule Activities** with the baseline schedule in the **Schedule App** under **Document Management**, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave this field blank. In the **Notes** column, you can add any additional comments.



Activity Code	Notes	Action
<input type="text"/> <input type="button" value="Q"/>	<input type="text" value="Additional Notes"/>	<div> <div>+</div> <div>-</div> </div>

### Own Equipment









The **Own Equipment** tab can be used by the KTR to track the equipment used on projects. To open a new line, click the blue plus sign under the **Action** column.

General			Tasks		Own Equipment	Subcontractor Equipment				Materials		Quality Control	
<input type="checkbox"/> Validate <input type="checkbox"/> Select All <input type="checkbox"/> Unselect All													
Action	Select	Comp*	Schedule Activity No.	Owner	Tran Code	Job	Phase	Cat	Hours Used	Notes (Work Location and Description)			
													

Enter your company in the **Company** field. If you imported the **Schedule Activities** with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave this field blank. Enter the person responsible for the equipment in the **Owner** field.





Comp*	Schedule Activity No.	Owner
ZZ-Acme Supply 		Sally Sue

If you have a Transaction Code, you can type it in the **Tran Code** field. The **Job** field will autofill with the Project Code. If you like to track the **Phase** and **Category**, you can type entries in those fields, but they are not required. Include a numeric value in the **Hours Used** field and any **Notes**, such as the Work Location and Description, in the last field.


Tran Code	Job	Phase	Cat	Hours Used	Notes (Work Location and Description)	Action
1235 	NAVTEST 	INITIAL 	SAWS 	3	Lower Floor, Framework 	 
						

### Subcontractor Equipment

Use the Subcontractor Equipment tab to track the equipment used by the Subcontractors. To add a new line, click the blue plus sign under the Action column.

Action	Owner	Construction Equipment Used Today (incl Make and Model)
 	SUBCON01 	Make & Model
		

Enter the Subcontractor in the **Owner** field. Include the **Equipment Make and Model**.

Owner	Construction Equipment Used Today (incl Make and Model)
SUBCON01 	Make & Model

If you need additional room for information or additional details, use the **Description** field.

**Description**

Additional Information

## Materials

Under the Materials tab, click the blue plus sign under the Action column to create a new **line**.

Action	Select	Company
+ -	<input checked="" type="checkbox"/>	
<span style="border: 2px solid red; border-radius: 50%; padding: 2px;">+</span>		

Then fill out the open fields for Materials. Here are the definitions.

### Company

Use the magnifying glass icon to select the company. Choose NAVFAC if submitting on materials for the Navy, Subcontractor if discussing a subcontractor, or the KTR company if reporting for yourself.

**Company**

ZZ-Acme Supply

### Schedule Activity No.

If you imported the **Schedule Activities** with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave this field blank.

**Schedule Activity No.**

### Submittal #

If there is an associated Submittal Number, you can enter it in the **Submittal #** field.

**Submittal #**

CC18NA-00001

### Quantity


Indicate how many units of the material are being used.

**Quantity**

25

**Units**

Click the magnifying glass icon to open a list of values for Units. Select the type of Unit, such as Dollars, Box, Cubic Yard, etc., used to measure the material quantities.

Quantity	Units	WM Code	WM Name
15		\$	Dollars
		BX	Box
		CY	Cubic Yard
		DY	Day

**Ticket #**

If the material vendor or KTR have an internal ticketing system, track the associated ticket number here.

Ticket #

123

**Time**

Select the time materials were delivered


Time

1 00 PM

**Received By**

Use the magnifying glass icon to select the company of the person who received the materials.


Received By

ZZ-ACME 

**Contact**

Use the magnifying glass icon to select the person who received the materials.


Contact

TESTKTRSUFQ 

**Vendor**

Type in the Vendor's Name


Vendor

ABC CO 

**PO Number**

If using Purchase Orders for materials, the PO Number can be tracked here


PO Number

1001 

**Release**

If using release forms, document them here


Release

APPROV 

**Line**

Indicate the line item being purchased

Line

172 



## Notes





Record any comments or notes associated with the Notes.

Notes


Comments here.

## Quality Control

Under the Quality Control tab, click the blue plus sign under the Action column to create a new line.

Action	QC Phase (note: link preparatory and initial phase checklists in the Checklists Folder)
 	
	





In the next column, **QC Phase**, select the magnifying glass icon to choose the type of checklist completed for this daily report.

QC Phase (note: link preparatory and initial phase checklists in the Checklists Folder)	Value
	<a href="#">Follow-up</a>
	<a href="#">Initial</a>
	<a href="#">Preparatory</a>

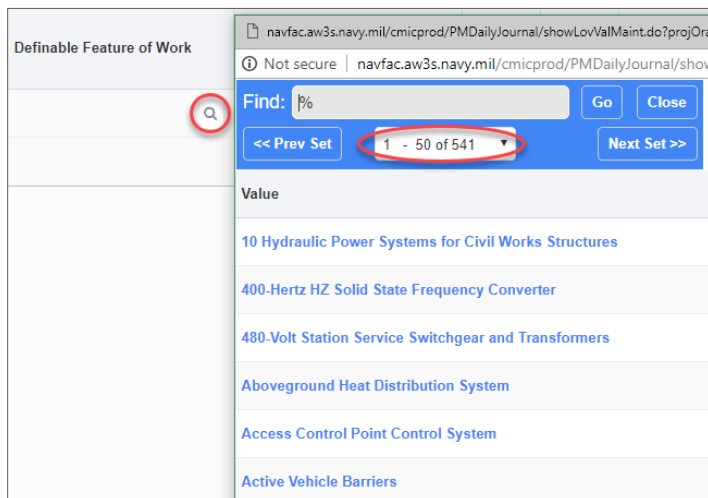
Checklists can be found in the Navigation Pane, under Site Management and then Checklists.

Dashboard
► Communication Management
▲ Site Management
Daily Report
Punchlists_Testing Logs
Non-Compliance Notices
Weekly Check List
▲ Checklists
KTR_QC Preparatory Phase
KTR_QC Initial Phase
GOV_QA_Green Zone_Preconstruction
KTR_Safety Contractor Self-Assessment
GOV_QA Report
GOV_Quality Assurance Surveillance Plan (QASP/CPARS)
GOV_QA Red Zone

Once the Daily Report is started, complete the checklist, and then link the Daily Report to the checklist using the **Related Objects** tab in the **Checklist**. There is no Related Objects tab in Daily Reports, so this function will need to be completed in the Checklist. Use the **QC Phase** field under the **Quality Control** tab of the **Daily Report** to indicate which checklist was completed.

Action	QC Phase (note: link preparatory and initial phase checklists in the Checklists Folder)
 	INITIAL 
	

In the next column, use the magnifying glass icon to select the **Definable Feature of Work**. A pop-up will appear with a list of 541 Definable Features of Work.



If you imported the **Schedule Activities** with the baseline schedule in the Schedule App under Document Management, then you can use the magnifying glass icon to select an **Activity Code** for this work. Otherwise, leave the Activity Code field blank.

Check the boxes to indicate with the work reported in the Daily Report complied with the Contract and with Safety.

Work Complies with Contract	Work Complies with Safety
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The final two columns are comment boxes for **Follow-Up** and **Remarks**. In the Follow-Up box, include information such as 1) Description of Work, 2) Testing Performed & by Whom, 3) Spec Section, 4) Location, and 5) List of Personnel Present. In the Remarks box, if this is the Follow-Up Phase, explain if the work did not comply with the contract or safety. For Re-Work, provide a description, and always include the Manufacturer Representative on-site.

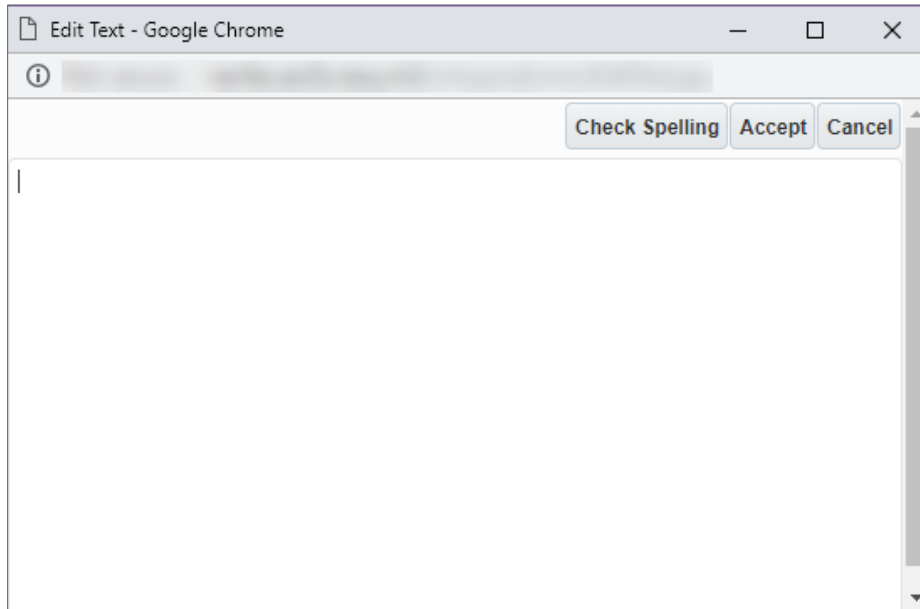
<p><b>For Follow-up provide 1) Description of Work, 2) Testing Performed &amp; by Whom, 3) Spec Sec, 4) Location, and 5) List of Personnel Present</b></p> <p>1) Description of Work, 2) Testing Performed</p>	<p><b>Remarks - (For Follow-up Phase explain if work does not comply with contract or safety.) (For Re-work provide description) Manufacturer Rep on-site, etc.</b></p> <p>Description</p>
--	--

### Safety

Under the **Safety Tab**, there are six open-answer fields. Users may log information with 4,000 characters or less for the following areas:

- Standards and Policies
- Precautions
- Fail Safe
- Concerns
- Records
- Additional Notes

To answer each section, either click in the box and start writing, or double click the box to expand into a larger field. When expanded, users will have the option to check spelling before entering their information.



#### **4.2.1.3 Copy Previous Reports**

Once a daily report has been created, save time on future Daily Reports by clicking the Copy Previous Report button in the top, right of the screen. Once copied, just update changes that occurred and Submit. All information is copied over except for the Quality Control tab. However, this feature is being programmed and should be available in the future.

## **4.3. Punchlists and Testing Logs**

### **4.3.1 Purpose**

The **Punchlists and Testing Logs** allow KTRs to report any work that is incomplete or damaged near the end of a project. **Punchlists and Testing Logs** are in the **Navigation Pane** under the **Site Management** folder.

Project: NAVFAC Test Project (NAVTEST)

- Dashboard
- ▶ Communication Management
- ▲ Site Management
  - Daily Report
  - Punchlists\_Testing Logs**
  - Non-Compliance Notices
- ▶ Checklists

### 4.3.2 Adding a New Punchlist

Under **Site Management**, select **Punchlists\_Testing Logs**. A list of existing Punchlists will display on the Punchlist Log.

On the upper right corner, click **Add Punchlist**.

Add Punch List
 Show Filter
 Send To Spreadsheet
 Enter Query

Fill in the required fields. Below is a short description of each field.

Punch List No.\* PL-0006 Status Open ▼

From KTR PM

To\*

Title\*

Description

**Punchlist No.** - This is the auto-generated number of the Punchlist.

**Punch List No.\*** PL-0006

**From** - This field indicates who sent the Punchlist.

From KTR PM

**To** – Select the receiver of the Punchlist using the dropdown.

To\* Test COR

**CC** – This can be used to add additional users that will need to see this Punchlist. They will not be able to respond.

CC



OK



**BCC** – Additional users can be added to the Punchlist. BCC users will not be able to respond, and their names will not be seen by other users.

Bcc



OK



**Status** – This field can be set to Open or Closed and refers to the overall Punchlist.

Status Open ▼

**Title** - Create a title of the Punchlist.

Title\* Test Punchlist

**Description** – Write a short description of this Punchlist.

Description Test Description

PUNCH LIST DETAILS									
Item No.	0001	Description	Punchlist Details						
Area Project	Area 1	Area Project		Area Project		Area Project		Area Project	
Responsibility	NAVFAC Partner	Area Project		Contact	Test COR	Area Project		Area Project	
Inspection Company	Architectural Engineer	Area Project		Inspected By	Test AE	Area Project		Area Project	
Status	Closed	Inspected	2019-01-16	Received On	2019-01-07	Issued On	2019-01-07	Area Project	
Started At	2019-01-07	Schd. Compl.	2019-01-14	Completed	2019-01-15	Reinspected	2019-01-16	Area Project	
Sign Off	2019-01-16	Value	1						

**Blue Plus Sign** – This adds information of Punchlist Details. Multiple Punchlist Details can be added by clicking this button.



**Item No.** – This refers to the number of the Punchlist Detail.

Item No. 0001

**Description** – A short description of this part of the Punchlist Detail is provided here.

Description Punchlist Details

**Area Project** – This is the physical area discussed in the Punchlist.

Area Project Area 1

**Responsibility** – A user will be a responsible for this Punchlist. This field indicates the user's company.

Responsibility NAVFAC Partner

**Contact** – The specific user that is responsible for this Punchlist.

Contact Test COR

**Inspection Company** – This is the inspector's company.

Inspection Company Architectural Engineer

**Inspected By** – The user who inspected this Punchlist.

Inspected By Test AE

**Status** – This refers to the status of the individual Punchlist Detail. The status can be affected if other fields within the Punchlist Detail have been set.

Status Closed ▼

**Inspected** – The date when Punchlist inspections occurred.

Inspected 2019-01-16

**Received On** – This is the date of when the Punchlist was received.

Received On 2019-01-07

**Issued On** – Date this part of the Punchlist was issued.

Issued On 2019-01-07

**Started At** – Date when the Punchlist is worked on after inspection.

Started At 2019-01-07

**Schd Compl.** – This is the Schedule Complete date: the projected date when the Punchlist will be completed.

Schd. Compl. 2019-01-14



**Completed** – The date the Punchlist was completed.

Completed 2019-01-15



**Reinspected** – The date the Punchlist was reinspected.

Reinspected 2019-01-16



**Sign Off** – The date the Punchlist was signed.

Sign Off 2019-01-16



**Value** – The value of the Punchlist after it has been reinspected and signed.

Value 1

Once the **Punchlist** has been completed, select **Submit** in the upper-right hand corner.

☒ Check Spelling

☐ Copy From

☐ Save Draft

☐ Save

☒ Submit

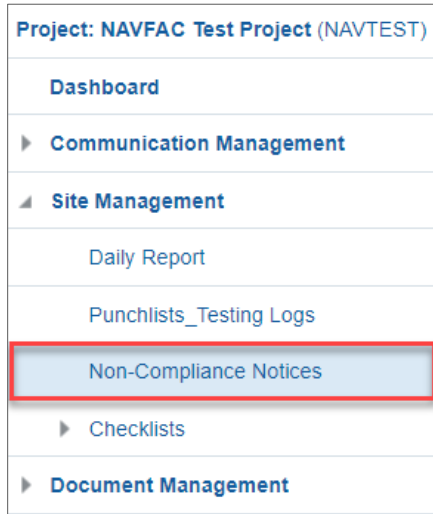
☐ Cancel

Refer to **Section 3.2.3 Attachments, Related Objects, and History** to add any **Attachments** or **Related Objects** to the Punchlist.



## 4.4. Non-Compliance Notices

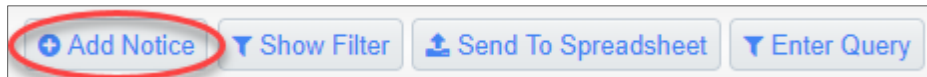
Non-Compliance Notices can only be issued by NAVFAC. **Non-Compliance Notices** are in the **Navigation Pane** under the **Site Management** folder.



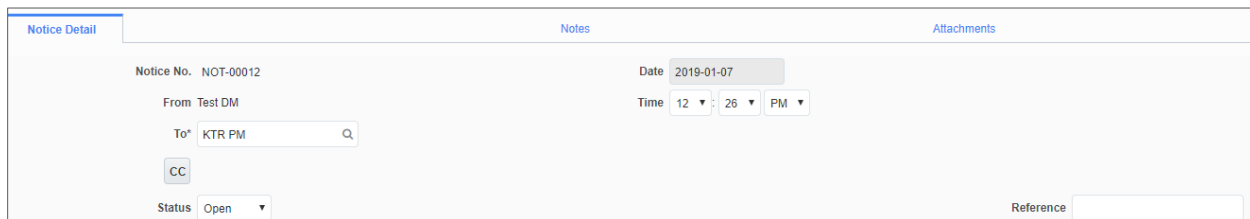
Project: NAVFAC Test Project (NAVTEST)

- Dashboard
- Communication Management
- ▲ Site Management
  - Daily Report
  - Punchlists\_Testing Logs
  - Non-Compliance Notices**
  - Checklists
- Document Management

Select **Add Notice** from the top, right corner of the screen.



The first four fields will auto populate with the **Notice Number**, **Date**, your user name in the **From** field, and the **Time** the non-compliance notice is created (in Eastern Time). Enter the name of the contractor in the **To** field. Use the **CC** function to notify other users of the notice. Using the dropdown list, select the **Status** of the notice.



Notice Detail | Notes | Attachments



Notice No. NOT-00012 | Date 2019-01-07

From Test DM | Time 12 : 26 PM

To\* KTR PM

Status Open | Reference

In the **Subject** line, enter a brief description of what this non-compliance notice pertains to. Use the **Notes** field to add details about the non-compliance. **Follow-Up Notes** can be added by NAVFAC or the KTR at a later date. A **Follow-Up** reminder can be set using the button and **Date** field at the bottom to add this to the KTR's action items.

Subject*	Non-Compliance Notice Example		
Notes*	Add details about the non-compliance.		
Follow Up Notes			
Follow-Up	<input checked="" type="checkbox"/>	Due Date	2019-01-10 
		Done On	<input type="text"/> 

You may use the **Attachments** tab to add drawings and photos. When done, click **Submit** on the top, right of the screen. The KTR will receive an indicator that a non-compliance notice is in their queue and the notice will show up in their My Actions list and on their Project Calendar in eCMS.

## 4.5. Checklists

**Checklists** are used for inspection and to keep the project on track. To locate **Checklists**, select the **Site Management** folder.

Project: NAVFAC Test Project (NAVTEST)	
Dashboard	
►	Communication Management
▲	Site Management
Daily Report	
Punchlists_Testing Logs	
Non-Compliance Notices	
►	Checklists

Then, click **Checklists**. The following are the **Checklists** that are currently available.

Checklists
KTR_QC Preparatory Phase
KTR_QC Initial Phase
GOV_QA_Green Zone_Preconstruction
KTR_Safety Contractor Self-Assessment
GOV_QA Report
GOV_Quality Assurance Surveillance Plan (QASP/CPARS)
GOV_QA Red Zone

### 4.5.1 Adding a New Checklist

Under **Site Management** and **Checklists**, select one of the Checklists. The **KTR\_QC Preparatory Phase** will be used in this example. Select **Add** on the upper-right corner.

Add
Show Filter
Send To Spreadsheet
Enter Query

Fill in the required fields of the upper half of the Checklist. A short description of the top fields is provided below.

Checklist Details	Notes	Related Objects	Attachments
Checklist No.* 00004 Created By KTR PM Created Date* 2019-01-07			
General			
Comments	Test Comments		
Spec Section	Test Spec Section		
Contract No.	<del>XXXXXXXXXX-XXXXXXXXXXXX</del>		
Definable Feature of Work	Test Definable Feature of Work		
Schedule Act No.	1		
Index #	1		

**Checklist No.** – An auto-generated number for this specific Checklist

Checklist No.\* 00004

**Created Date** – The date the Checklist was created

Created Date\* 2019-01-07

**Created By** – Indicates the user who created the Checklist

Created By KTR PM

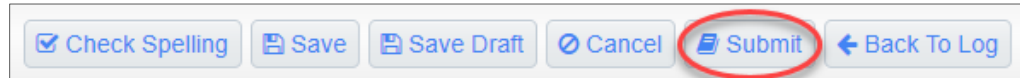
The **General** section varies between Checklists. There will be up to six comment boxes that allow for open answer responses. Each comment box can hold 4,000 characters.

General	
Comments	Test Comments
Spec Section	Test Spec Section
Contract No.	<u>XXXXXXXXXXXX-XXXXXXXXXXXX</u>
Definable Feature of Work	Test Definable Feature of Work
Schedule Act No.	1
Index #	1

The final part of all of the checklists are the questions. Each question is accompanied by a **Y** for Yes, **N** for No, or **NA** for Not Applicable. Select the answer that best matches the question asked. Then add any additional information in the **Comment** box provided. Type the **Date** when relevant.

Checklist			
Personnel Present	Y N NA	Comments	Date
Government Rep notified? Name? Position? Company/Government?	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	John Doe, Construction Manager, NAVFAC	01/07/2019
Submittals	Y N NA	Comments	Date
Review Submittals and/or Submittal Register. Have all Submittals been submitted and approved? (If no, what items have not been submitted or approved)	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Answer here.	
Are all materials on hand? If no, what items are missing.	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	N/A	
Check approved Submittals against delivered material. (This should be done as material arrives.) Comments	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>	Awaiting final Submittals	
Material Storage	Y N NA	Comments	Date
Are materials stored properly? If no, what action is taken?	<input checked="" type="radio"/> <input type="radio"/> <input type="radio"/>		

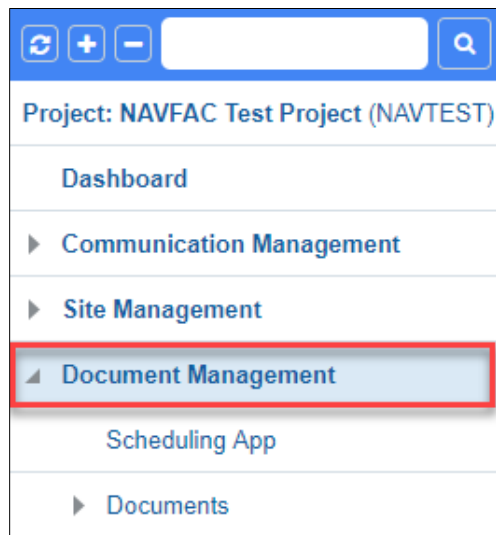
All checklists should be similar to existing forms that you are familiar using. Complete all pertinent information and then select **Submit** in the top, right corner of the screen.



## 5. DOCUMENT MANAGEMENT

### 5.1. Background

The Document Management section of eCMS is located in the **Navigation Pane** on the left side of the screen.



This section consists of the **Schedule App**, where schedules can be created from scratch or Primavera and MS Project schedules can be imported or exported. Primavera files can also be uploaded in the Document Attachments.

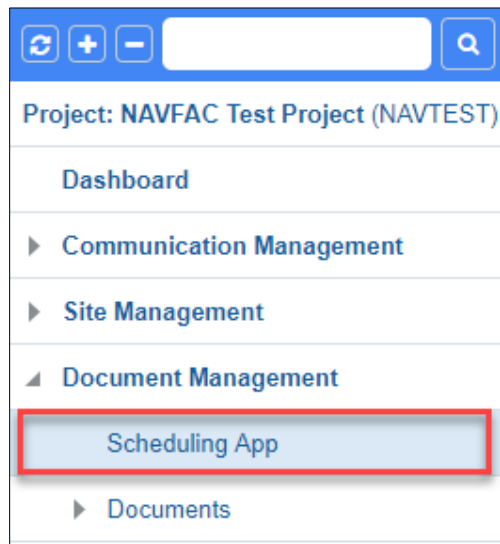
This section also includes **Documents**.

### 5.2. Restrictions on Document Upload

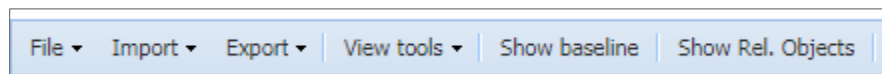
A user can upload as many files as needed. However, the size limit of files per batch upload is 200 MBs.

### 5.3. Schedule App

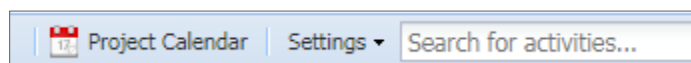
In the **Navigation Pane** on the left side of the screen, open the **Document Management** folder and select the **Schedule App**. If any baseline schedules have been uploaded, they will appear here.



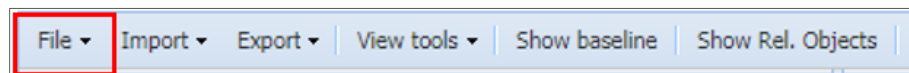
At the top of the schedule screen, several tabs appear. Use these to create a schedule or import an existing schedule.



On the right side of the same bar, the **Project Calendar** displays the **Schedule**. With the dropdown, adjust the settings to only see critical path milestones, cascade changes, or view only tasks that are less than 30% complete. Users can also use the search bar to search for specific activities.

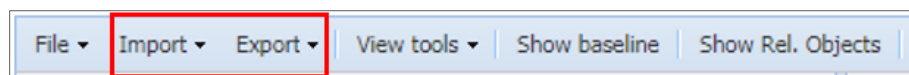


### 5.3.1 Files

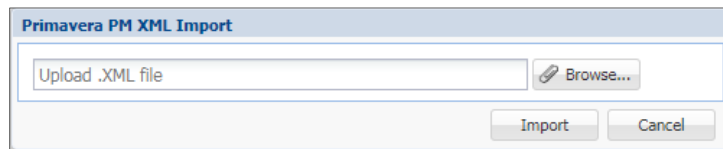


Using the dropdown menu on the **File** section of the tool bar, you can choose to **Save** the schedule created, **Approve** the baseline schedule for the project, Refresh the tasks, or Print the schedule to PDF.

### 5.3.2 Import/Export Schedules



To import a schedule from CSV, Primavera, or MS Project, select the **Import** dropdown. Select the file type. A popup will appear for the **Import**.



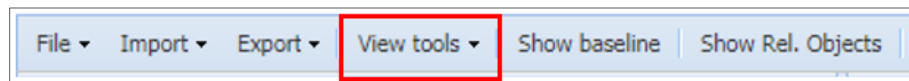
Click the **Browse** button to find the file on your computer and select **Import** when done.

To **Export**, select the dropdown next to the **Export** button on the tool bar. Select the file type to **Export**. This will automatically download the file to the desktop.

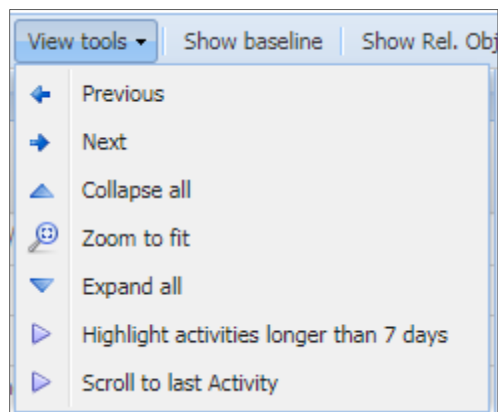
**NOTE:** If the user does not have Primavera or MS Project installed on their computer, these file types will not work.

### 5.3.3 Tools

Select the dropdown next to **View Tools** on the tool bar.



Use these tools to navigate the **Activities** and **Tasks** in the schedule. The **Previous** and **Next** buttons will move the viewer back and forth between tasks.



**Collapse All** will collapse all tasks so that the user is only viewing the **Activities** folders.

Activities		
Activity Name	Start	Finish
▶ P-100 BLDG/TSB-2/SAEP/SITE	08-20-2014	04-08-2018
▶ P-100 PIER WORK LESS MECH/	08-20-2014	09-26-2017
▶ P-100 MECH/ELEC ON PIER	08-20-2014	08-17-2017
▶ P-100 SITE IMPROVEMENTS	08-20-2014	06-14-2016
▶ P-100 TSB-2 UPGRADED DOOR	08-20-2014	06-14-2016
▶ OPTION 1: P-099 BLDG/TSB-2A	08-20-2014	02-08-2017
▶ OPTION 2: P-099 IX-516 MOOR	08-20-2014	09-01-2016
▶ OPTION 3: P-099 TSB-2A UPGR	08-20-2014	08-20-2014
▶ OPTION 4: P-099 DEMO & REM	08-20-2014	08-20-2014
▶ OPTION 5: P-100 ESS & IDS SY	08-20-2014	08-20-2014
▶ OPTION 6: P-099 ESS & IDS SY	08-20-2014	08-20-2014
▶ P-100 FF&E TSB-1 & TSB-2	08-20-2014	08-20-2014
▶ P-099 FF&E TSB-2A	08-20-2014	06-27-2016

**Zoom to Fit** will format the schedule to appear on one screen. For larger schedules, this may be difficult to read.

**Expand All** will display all tasks in the **Activities** folders.

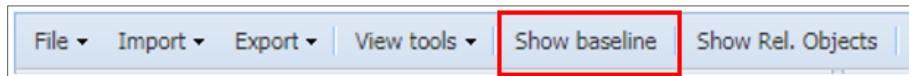
Activities		
Activity Name	Start	Finish
▲ P-100 BLDG/TSB-2/SAEP/SITE	08-20-2014	04-08-2018
Test	11-19-2014	11-19-2014
Mobilization	01-12-2015	01-16-2015
Develop Offsite Parking	03-03-2015	03-23-2015
Install Erosion Control/Silt Fe	02-20-2015	03-02-2015
Clearing & Grubbing Sequen	03-03-2015	03-23-2015
Earthwork Sequence 1	03-10-2015	04-03-2015
Storm Drainage Parking Lot	03-23-2015	04-13-2015

Use the **Highlight Activities Longer than 7 Days** button to see what tasks need extra attention.

The **Scroll to Last Activity** button will take the user to the last activity in the schedule.

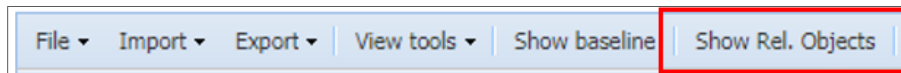


### 5.3.4 Baselines



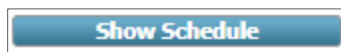
Select the **Show Baseline** button to show the baseline schedule of the project.

### 5.3.5 Related Objects



Select the **Show Related Objects** button to see if any **Communications**, **Internal Routing** tasks, **RFIs**, **Submittals**, or other documentation are attached to the schedule.

### 5.3.6 Show Schedule



Select the **Show Schedule** button in the right corner of the **Schedule** page to show a high-level view of the schedule.

## 5.4. Documents

The Documents dropdown opens a list of available folders for use on your project. Use these folders to organize attachments. Files can be uploaded directly to a folder or attached using the Attachments function of an RFI, Submittal, Communication, Issue, or other applications in the system. Find the Documents folder in the **Navigation Pane** under **Document Management**. Your Documents folders may vary from the picture below.

▲ Documents
Base Specific
Claims - REA
Closeout - BOD, Warranty, As-Builts
Commissioning - Plan/Report
Contract Drawings - Native Drawing, PDF
Contract Items - Bonds, Ins., Award Docs
Contract Specs. - Amendments
Correspondence - KTR, NAVFAC, AE
Daily Reports - Production, QC, Prep
Government Furnished Equipment
Invoice Documentation
Meeting Minutes - PAK, Pre-con
Modifications - RFPs
Other
Photos - Progress by date
Quality - Performance Assessment, DR
RFI - Attachments
Reports - Test Plan/Log and Reports
Safety-Env. - APP, AHA
Schedules - PDF, Native
Submittal - shop drawings

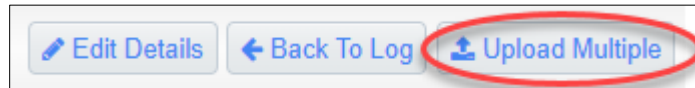
## 5.4.1 Uploading Attachments

### 5.4.1.1 Uploading Attachment to an RFI, Submittal, and other records

To attach an attachment, the record must first be saved as a draft or submitted. Once this is done, navigate to the **Attachments** tab.



Select **Upload Multiple** on the upper-right corner.



Select the files to upload or drag and drop them on the screen. The bar will turn yellow. Wait for the bar to turn green as shown below. Then, click **Upload**. Please disregard the note as it may display an incorrect maximum file size. The maximum file size per batch upload is 200 MBs.

UPLOAD MULTIPLE

Choose Files | No file chosen

or drop files here

204800 KB

204800 KB

Filename

Size

200MB.zip

204800 KB

Number of Files: 1

204800 KB

Note: Maximum upload file size for each file is 1537MB. If file size exceeds 1537MB, file will be highlighted in RED.

Note: Remove unnecessary files before uploading.

Upload

Remove

Cancel

UPLOAD STATUS

In progress

Successful

Failed

UPLOAD MULTIPLE

Choose Files | No file chosen

or drop files here

204800 KB

204800 KB

Filename

Size

200MB.zip

204800 KB

Number of Files: 1

204800 KB

Note: Maximum upload file size for each file is 1537MB. If file size exceeds 1537MB, file will be highlighted in RED.

Note: Remove unnecessary files before uploading.

Upload

Remove

Cancel

UPLOAD STATUS

In progress

Successful

Failed

A new screen will appear asking for more information about the files. Use the dropdown menu under **Type** to show the type of file and document folder where this attachment will be placed. Once the **Type** has been selected, click the **Enter Additional Fields** button if you want to add more details, or click **Proceed** to upload.

Enter Additional Fields Proceed Close

**SELECT DOCUMENT TYPES**

No.	Name	Type	Has Mandatory Fields	Action
1.	200MB.zip	-- Please Select a Document Type -- -- Please Select a Document Type -- Base Specific Claims - REA Closeout - BOD, Warranty, As-Built, e/OMS, LEED, DD1354 Commissioning - Plan/Report, Pre/Functional/Integrated Tests Contract Drawings - Native Format, PDF, BIM, Designs Contract Items - Bonds, Ins., Award Docs, Subcontracting Plan Contract Specs - Amendments Correspondence - KTR, NAVFAC, AE, Permits/Outages Daily Reports - Production, QC, Prep, Initial, Rework, QA, NCN Government Furnished Equipment Invoice Documentation Meeting Minutes - PAK, Pre-con, QC Plan/Coordination and Mutual Understanding Modifications - RFPs Other Photos - Progress by date (subject to base restrictions) Quality - Performance Assessment, Daily Rep, Production, Prep/Initial/RedZone RF1 - Attachments Reports - Test Plan/Log and Reports, GOVT Reports Safety-Env - APP, AHA, Hazard Specific Plans, Mishap Reports, MSDS, ENV comp	<input type="checkbox"/>	

There will now be a checkmark next to the **Attachments** tab indicating that there is an attachment.



#### 5.4.1.2 Uploading Attachments to a Document Folder

Choose the folder to add an attachment. Then select **Add Document** from the top, right bar to add a single file or **Upload Multiple** to add several attachments at once.

Add Document Import Upload Multiple Show Filter Send To Spreadsheet Enter Query

**DOCUMENT: PHOTOS - PROGRESS BY DATE (SUBJECT TO BASE RESTRIC**

Number	Title	Last Ref. Code	Uploaded By	Related Object	Location	Description	Received	From Contact
NAVTE-PHO-0001	Test1		KTR PM				2018-06-29	
NAVTE-PHO-0002	Test		KTR PM					
NAVTE-PHO-0003	30mb Test		KTR PM		1			

A screen will appear to upload attachments. Click **Choose File** from the **Attachment** box. When a user uploads a file, the **Title** will automatically generate.

Check Spelling Cancel Save

**ADD PHOTOS - PROGRESS BY DATE (SUBJECT TO BASE RESTRICTIONS)**

Number\* NAVTE-PHO-0014 Title\*

Document Folder Select

From Contact

Location Description Received

**REVISION INFO**

Designer Ref.	Revision Date	Received Date	Status	Description*	URL	Attachment
	2019-01-07	2019-01-07	Open	Original Version		<input type="checkbox"/> Choose File No file chosen

Complete the boxes to add additional information about the attachment such as the location, description, and date. Enter drawing numbers under the **Designer Ref.** box. After uploading, select **Save** in the top, right of the screen.

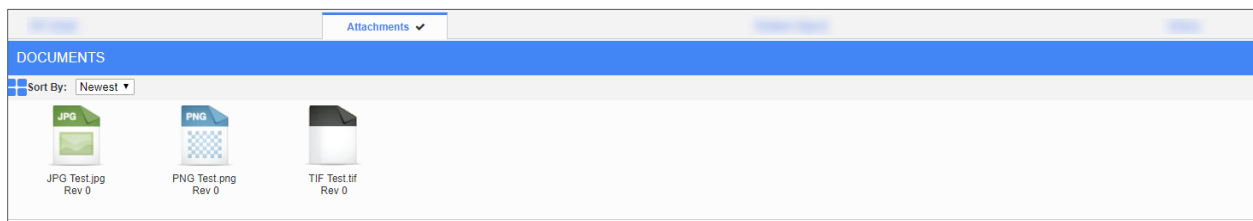
## 5.4.2 Downloading Attachments

### 5.4.2.1 Downloading Attachment from an RFI, Submittal, and other records

To download an attachment from a record, navigate to the **Attachments** tab.



This tab displays all attachments currently attached to the record. For this example, there are three attachments.




Right-click on the attachment that you want to download. Depending on the browser used, select “Save link as...” or “Save target as...” to download the file.

### 5.4.2.2 Downloading Attachments from a Document Folder

Choose the Documents folder the attachment is located. **RFI – Attachments** will be used for this example. Locate the attachment you want to download. Click the hyperlink in the **Number** column to view.

DOCUMENT: RFI - ATTACHMENTS									
Number	Title	Last Ref. Code	Uploaded By	Related Object	Location	Description	Received	From Contact	
<a href="#">NAVTE-RFI-0001</a>	Test File for upload		Test COR						
<a href="#">NAVTE-RFI-0002</a>	Test File for upload		Test COR						
<a href="#">NAVTE-RFI-0003</a>	Test File for upload								
<a href="#">NAVTE-RFI-0004</a>	Test File for upload				1				
<a href="#">NAVTE-RFI-0005</a>	Test File for upload				1				

Right-click the hyperlink under the **Attachment** column. Depending on the browser used, select “Save link as...” or “Save target as...” to download the file.

RFI - Attachments Detail					Text Codes					
Number NAVTE-RFI-0001					Title Test File for upload					
From Contact										
Location					Description				Received	
REVISIONS										
Number	Designer Ref.	Revision Date	Received Date	Status	User	Description	Notes	Attachment	Change #	Action
0		2018-02-19	2018-02-19	Open	Test COR	Original Version		<a href="#">Test File for upload.docx</a>		 Update Packages