Cover Photo

140806-N-PA772-001 JACKSONVILLE, Fla. (Aug. 6, 2014) U.S. Navy photo by Earl Bittner/Released
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<td>5.2.</td>
<td>Potential Change Item</td>
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<td>5.4.</td>
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</tbody>
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## UPDATES

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Summary of Changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2017</td>
<td>1.0</td>
<td>First complete draft released</td>
</tr>
<tr>
<td>Aug 10</td>
<td>1.1</td>
<td>Added Section 1.4</td>
</tr>
</tbody>
</table>
1. GETTING STARTED

1.1. Purpose and Background

NAVFAC is developing an Electronic Construction 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 Contractor 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.

1.2. Users

1.2.1 Active and Passive Users

Different users will have different permissions and responsibilities within the eCMS System. NAVFAC Users and Contractors (KTRs) 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

eCMS can be accessed at [http://wl001.uat.navfac.us/cmicuat/SdMenu/](http://wl001.uat.navfac.us/cmicuat/SdMenu/). The administrator will provide a user name and password to log in.

**NOTE:** Upon first login, immediately change the system-provided password in the System Contact Info field (See Section 1.2.2.1).
This will open the login screen.
1.2.2.1 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, select the icon with a person found on the top, right corner of the screen.

A popup will appear with the user’s information. Adjust any fields that need correction. If the user password has not been changed from the original provided, change it now in the **Password** field at the bottom of the screen.

After changes are complete, select **Save** in the top, right corner of the popup screen.
1.2.2.2 E-mail Notifications

Use the E-mail Notifications tab at the top of the popup to set up when an e-mail communication is sent from eCMS to an Outlook or other e-mail account.

For instance, to receive an e-mail every time NAVFAC sends a communication on a project, check the box next to Communication and select Save. The New column is for any newly added objects, the Mod column is to receive e-mails for any modifications to an object, the Note column will send e-mails for notes added to an object, and the Att column is for attachments.

Users will not need to access the User Defaults or External Software Logins tabs.

1.3. System Features

1.3.1 Navigation Pane

Find the Navigation Pane on the far left of the screen. The folder structure may vary from project to project. There will always be a page that navigates to the Dashboard. There will be four folders for Communication Management (See Section Error! Reference source not found. for details), Document Management(See Section Error! Reference source not found. for
details), **Reports** (See *Section* Error! Reference source not found. for details), and **Site Management** (See *Section* Error! Reference source not found. for details).

Click on the plus sign next to each folder to see the pages for each grouping.

To change project views, first click on the name of the Project. A title will appear in the dropdown box at the top of the pane. Click on the dropdown menu.

This will open a popup screen with a list of available projects to view. Select the project to view.
1.3.2 Required Fields

In each form, there will be required fields 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 little blue triangle in the corner next to the label. In the example below, the **RFA No.**, **From**, and **To** are required fields. **Co-Author** is not required.

![Required Fields Example](image1)

1.4. Technical Support and Feedback

For the beta test of eCMS, use the **Forums** project to submit questions, concerns, ideas, or any other feedback to NAVFAC.

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

![Technical Support](image2)

This will open a dropdown list of all of the projects the user is assigned to. Select **Forums**.
1.4.1 Download Training Manuals

After opening the Forums project (see instructions at the beginning of Section 1.4), use the Navigation Pane to select Documents, and then Training Manuals.

This will open a list of training documents available to you. These documents are regularly updated and the newest version will be immediately uploaded in eCMS. The first document is a PowerPoint training lesson created to initiate new users. Then there are two PDF Training Manuals; one manual is for Contractors to use, and the other manual is for NAVFAC employees to use. Select a document to view by clicking on the number next to it.

This will open a new screen with the document available to view or download. Click the link under the Attachment column.
This will open the document in a new browser. From here you can scroll to view, download, or save the document to your desktop.

### 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. To access the **Forums** project, please see the beginning of **Section 1.4**.

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

Once the **Issues** screen opens, there will be a link in the top, right of the screen that says **Add Issue**. Select this.

The **Issue Detail** screen will appear. The **From** section will already be completed. If you know the name of the person that needs to review the Issue, enter them in the **To** section. If not, 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.

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.
2. NAVIGATING THE DASHBOARD

The Dashboard is under construction and unavailable for use. The Dashboard will offer rolled-up project management information upon login. NAVFAC would appreciate feedback on desired functionality that could make things easier or more efficient. Below is a sample of how the Dashboard may appear:

![Dashboard Screenshot]

Some of the potential sections of the Dashboard include:

- **Project Photo and Description**
  - **Project Image**
More fields will become available as the system is completed.
3. COMMUNICATION MANAGEMENT

3.1. Background

The Communication Management section of eCMS lays the foundation for project management. After logging into the system and selecting the project to view, a Project Management Menu will appear over the Navigation Pane. Click on the plus sign next to the folder to open.

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 Submission, checking deadlines and responsibilities, and accessing team members.

This section will cover:

- Process for Sending RFIs and Submittals
- How to add attachments to a record
- 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. RFAs

3.2.1 Purpose

A Request for Action (RFA) is a rolled-up system to manage Requests for Information (RFIs) and Submittals from KTRs working on construction and facilities management projects. Use the RFA system to communicate with NAVFAC and send RFIs and Submittals. An e-mail notification will alert you when NAVFAC responds. View all new responses and other communications upon login.

The RFAs folder in the navigation pane will be bolded when new information regarding RFAs is available. (NOTE: Folder lists may look different than pictured above depending on the project.)

3.2.2 RFIs and Submittals

KTRs can send two types of RFAs 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 mock-ups that can cause major changes to the project. The NAVFAC team will review to figure out the cost and schedule impact to the project and approve or deny the proposed solution and respond to any questions.

Below are the workflow diagrams for RFIs and Submittals.
Construction Request for Information (RFI) (Design/Build, Design/Bid/Build)

**Contractor PM**
- Start
  - Generate RFI
  - Submit RFI to CM
  - Review Approved RFI response
  - End

**Construction Manager (CM)**
- Review RFI
  - Admin or Technical?
    - Admin
    - Technical
  - Route to DM and update document status to "Under Review"
    - Set review deadline
    - Update document status to "Under Review"
    - Generate RFI Response
    - Review RFI Response
  - Contract Modification Process
    - Yes
    - Cost impact?
      - No
      - Review RFI Response cost impacts

**Design Manager (DM)**
- The DM can use in-application collaboration tools to communicate with other design team members if necessary for the response
  - Generate RFI Response
Construction Technical Submittal (Design/Build, Design/Bid/Build)

**Contractor PM**
- Start
- Generate Technical Submittal
- Submit document to CM
- Review and incorporate comments/edits
- Review Technical Submittal
- End

**Construction Manager (CM)**
- Route to DM and update document status to “Under Review”
- eCMS will notify all users in the review cycle that the review is complete after receiving approval

**Design Manager (CM)**
- As a default, all review team members, including customers, will be selected
- Select Design Team Reviewers and set review deadlines
- eCMS will alert users on pending review deadlines
- Review Technical Submittal

**Design Team Members**
- Review Design Team Feedback
- Approve?
- Document reasons for rejection
- No
- DM will be able to approve without all design team comments, for example if deadline is passed
- eCMS will allow users to make overall comments and mark up plans or specifications
3.2.2.1 RFA Process

Using the navigation pane on the left side of your screen (See Section 3.2.1 for reference), click on RFAs. A list of all RFAs will appear and includes their status as Open, Accepted, Rejected, or Pending under the Status column. You can open the RFA to view by clicking on the title under the Subject column.

<table>
<thead>
<tr>
<th>Subject</th>
<th>Question</th>
<th>Date Created</th>
<th>From</th>
<th>To</th>
<th>Date Required</th>
<th>Date Answered</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Room for Maintenance</td>
<td>Test</td>
<td>19 Jan 2017</td>
<td>John Doe</td>
<td>17 Jul 2017</td>
<td></td>
<td>OPEN</td>
<td></td>
</tr>
<tr>
<td>TEST RFI</td>
<td>TEST RFI</td>
<td>15 Jan 2017</td>
<td>John Doe</td>
<td>13 Jul 2017</td>
<td></td>
<td>PENDING</td>
<td></td>
</tr>
<tr>
<td>Testing after session</td>
<td>Modified</td>
<td>14 Jan 2017</td>
<td>John Doe</td>
<td>12 Jul 2017</td>
<td></td>
<td>OPEN</td>
<td></td>
</tr>
<tr>
<td>This is a maximum file attachment test for RFAs</td>
<td>This is a RFA test for maximum file size capabilities during transmit.</td>
<td>13 Jan 2017</td>
<td>Keith Woodard</td>
<td>11 Jul 2017</td>
<td></td>
<td>OPEN</td>
<td></td>
</tr>
<tr>
<td>This is yet another test for RFAs</td>
<td>Test</td>
<td>12 Jan 2017</td>
<td>Keith Woodard</td>
<td>10 Jul 2017</td>
<td></td>
<td>PENDING</td>
<td></td>
</tr>
</tbody>
</table>

To send an RFA, click the Add RFI button at the top right of your screen.

A new screen will open. Enter the details of the RFA, and once complete, send to NAVFAC. For both RFIs and Submittals, the following fields are the same:

- **RFA Number**: This field shows the number automatically assigned to the RFA
- **GOV Disposition**: This is the NAVFAC RFA status. Before an RFA is sent, it shows as PENDING
- **From**: Sender’s name appears in the From category
- **Co-Author**: Co-Authors can be added to an RFA using the dropdown menu
- **Co-Author RFA No.**: If the co-author has sent a complementary RFA, enter the **Co-Author RFA Number** in the next field to help NAVFAC find the relevant RFA.

- **To**: Use the dropdown menu to select the NAVFAC person receiving RFA submissions.

- **CC**: Copy team members to grant them access to the communication trail and all information sent to NAVFAC.

For the second part of the RFA Form, some fields will vary based on RFI or Submittal choice.

- **Subject**: Enter a **Subject**. Keep it short and easy for NAVFAC to read while skimming through subjects. The opportunity to elaborate on any details is available further in the form.

- **Date Created**: The date the RFA was created.

- **Date Required**: Per the specifications, NAVFAC has 20 working days to review submittals and the **Date Required** should not be less than this.

- **RFI or a Submittal**: Use the dropdown to select RFI or Submittal.

- **Submittal Type**: Do not respond to **Submittal Type** if processing an RFI. If processing a Submittal, open the dropdown list and select the choice that best fits the Submittal.
**Spec-Section:** The Spec-Section field is used for Submittals. There is a field for Construction and a field for Facilities. Choose the Spec-Section related to the Submittal, if relevant.

**Submittal Variation:** This field defaults to No. If you are processing an RFI, leave it as the default. If you are processing a Submittal, and you have a variation from the design, you should select Yes.

**Drawing Number:** For Submittals only, include the Drawing Number from the original Design.
- **RFI Disclaimer and Submittal QC Certification**: Leave fields as is. They read:

  **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.

  **Submittal QC Certification**: NOTE: It is hereby certified that the material submitted herein conforms to contract requirements and can be installed in the allocated spaces.

- **Critical Path**: If the RFA will affect the critical path of the schedule, select Yes from the dropdown; otherwise, select No. The original design of the project will include the critical path schedule.

- **Action Code Status**: Do not select anything in this field.
3.2.3 Attachments, Related Objects, and History

When viewing an individual RFA from the navigation pane (See Section 3.2.1 for reference), there are four tabs across the top of the screen.

- The first tab, **RFA Detail**, has the bulk of information about the RFA.
- The **Attachments** tab will have attachments sent with this RFA. Use this screen to add attachments.
- The **Related Objects** tab will track communication, issues, and relevant documentation with stakeholders throughout the project.
- The **History** tab will allow the viewing of updates and decisions made on the RFA.

### 3.2.3.1 Attachments

View or add attachments from the **Attachments** tab in an RFA. To find this tab, click **RFAs** in the navigation pane (See Section 3.2.1 for reference), and then select the RFA to view. Once open, select the **Attachments** tab.
**Upload Multiple Attachments**

To upload multiple attachments at once, click on **Upload Multiple** in the top right panel of the screen.

Select the files to upload or drag and drop them on the screen. Then click **Upload**.

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. Then select the **Enter Additional Fields** button.

A second popup will appear with more fields to complete. Check these fields for accuracy.

For the **SB – Designer Ref.** field, enter the Drawing Number relevant to the documents you are uploading. Make sure the rest of the information on this screen is correct and click the **Save** button at the top. This field is not mandatory.
**Individual Upload**

To upload one document at a time, click **Add/Upload New** at the top of the screen.

Select the type of file to upload from the dropdown.

A new screen will appear. Click the **Choose File** button under the **Attachment** field and select the file. In the **SB – Designer Ref.** field, enter the Drawing Number related to this attachment. Ensure other fields are correct and click **Save** in the top, right corner.

### 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 RFA.

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. Then select **Add New**. See **Section 3.3** for information on adding a new object.
Users can select from the following fields:

- Communication
- Daily Report
- Field Work Directives
- Issue
- Notice
- RFAs
- Meeting Minutes
- Checklist

There may be different fields available depending on permission level and project; however, these are the only fields in use.

### 3.2.3.3 Reviewing the RFA History

The **History** tab displays all decisions, edits, and notes made to an RFA.
3.2.4 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)

3.2.4.1 Filtering

Select the RFAs button in the navigation bar on the left side of the screen to pull up a list of all RFAs (See Section 3.2.1 for reference). To find specific RFAs, sort the list by selecting the Show Filter button at the top right of the screen.

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.

<table>
<thead>
<tr>
<th>Column</th>
<th>Operator</th>
<th>Value</th>
<th>Example Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFA No.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forwarded as</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Created</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Required</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Answered</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days to Resolution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Partner Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To Partner Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RFI or Submittal</td>
<td>=</td>
<td>'RFI'</td>
<td></td>
</tr>
<tr>
<td>Submittal Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spec Section</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submittal Type Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spec Section Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>RFI or Submittal</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Save As Default  Reset To System Defaults  Show All Filters  Clear  Reset  Submit  Cancel
**Operator**: Select the dropdown arrow next to the field you want to sort. A list of symbols appears. These will set the parameters of the filter:

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

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.

Enter dates in DD-MON-YY format and you may use a % as a wildcard for searches. This field is somewhat technical. An easier way to sort data is to download the RFAs 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.

### 3.2.4.2 Send to Spreadsheet

Send all RFAs 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 your screen.

This will automatically download a spreadsheet with all the user’s RFA information included. From there, 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.
3.2.4.3 Enter and Execute a Query

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

In the blue bars that show up at the top of the spreadsheet, enter the search terms for the field to be filtered. For instance, to filter all RFIs, enter RFI under the **RFI or Submittal** field.

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

To query multiple fields, just enter the information in each field and click **Execute Query**. Use % to sort for a part 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 allows us to 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

3.3.1 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 of an RFA. Starting in the Navigation Pane of the relevant project, open the Communications folder.

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

In the Communication Detail screen that appears, complete the required fields.
Below is a brief description of each field:

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

**From** – This field will have the sender’s name.

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

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

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

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

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

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

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

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

Comments – The person responding can provide their feedback here.

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

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 RFA, see Section Error! Reference source not found. and select Communication. Then follow the instructions in this section.
3.3.1.1 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.

After the response has been added, click Submit in the top, right of the screen.
3.3.2 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 3.3.1 for reference).

From here, see Section Error! Reference source not found. on how to use each sorting method.

3.4. Project Calendar

3.4.1 Purpose

The Project Calendar shows the date RFAs were received, due date, and any Action Items, Communications, or Internal Routing (IR) requests received and due. To access the Project Calendar, go to the Navigation Pane on the left side of the screen, and select it from the Communication Management folder.
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.

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

**Calendar Preferences**

Some of the features on this popup are still being configured and may give an error message. However, once complete, users will be able to add holidays to their project calendar, see other team members’ schedules, and share their calendar.

### 3.4.2 Adding Action Items to Calendar

When a user creates an RFA, Communication, or IR record, eCMS automatically adds the due date to the calendar of the person assigned to the task. To add events and reminders to your own calendar, select **Add Action Item** from the top, right of the screen.

This popup will appear:
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.

For – Use the dropdown to select the responsible person

Action Code – This field can be left as is

Start Date – Date the action item is assigned

Time – Time the action item is assigned

Title – Title of the action item

Description – Description of required tasks

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

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

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

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.

Alert Date – Set an alert for the action item

Status – Use the dropdown menu to select the status of the action item. It will default to New Action Item, but can be changed to Cancelled, Closed, Completed, Deferred, Ongoing, or Under Review.

Duration – This field is not required.

End Time – Time when action item is completed.

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

Completed Date – The date the action item is completed.

Alert Time – Set a time to receive an alert.

After completing the form, click Save in the top, right corner of the popup box.

3.5. My Actions

My Actions are a list of upcoming due dates for RFAs, Action Items, Communications, and 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 the user’s action items organized by date.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>28/Oct/2016</td>
<td>Meeting</td>
<td>Action for test</td>
</tr>
<tr>
<td>12/Jul/2017</td>
<td>RFI-0001</td>
<td>Test RFI Attachment Upload for PDF</td>
</tr>
</tbody>
</table>

To view tasks by type, click on the **Group By Type** link on the header bar.

The list will then be reorganized by type.
4. DOCUMENT MANAGEMENT

4.1. Background

The Document Management section of eCMS is found 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 and Document Packages for RFIs and Submittals.

4.2. Restrictions on Document Upload

The size limit of files per batch upload is 800 MB. Each individual file must be less than 200 MB. To send files using the system workflows to an e-mail, the files must be under 7 MB total.

4.3. 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.

4.3.1 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.

4.3.2 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.
4.3.3 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.
**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 Table]

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

### 4.3.4 Baselines

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

### 4.3.5 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.

### 4.3.6 Show Schedule

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

Use the Documents section to upload documents to RFIs, Submittals, or Projects. Find the Documents folder in the Navigation Pane under Document Management.

Choose either the RFI Attachments or Submittal Attachments folder to add a document. Then select Add Document from the top, right bar.

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

After uploading, select Save in the top, right of the screen.
5. SITE MANAGEMENT

5.1. Background

The Site Management section is still under construction. Some sections may not work. Feel free to use the Site Management Forms available and give feedback on what is useful, and what you would like to see added to this section.

These forms are deliverables KTRs give to NAVFAC. These features allow KTRs to easily add, track, and update daily reports, punchlists, field work directives, notices, and checklists within the project. Until configuration within in the system is complete, KTRs may use Document Management to upload PDFs of existing forms (See Section 4.4 for guidance).

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

See the sections below for screenshots of the forms. Each section will be available when configuration is complete.

5.2. Potential Change Item

This section is currently unavailable. Technical resources are working on resolving the issues.
5.3. Daily Report

5.4. Punchlists

5.5. Field Work Directive
5.6. Notices

5.7. Checklists

This section is unavailable. Technical resources are working on resolving the issues.