Cover Photo

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

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<th>Version</th>
<th>Summary of Changes</th>
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<tbody>
<tr>
<td>July 2017</td>
<td>1.0</td>
<td>First complete draft released</td>
</tr>
<tr>
<td>July 17, 2017</td>
<td>1.2</td>
<td>Added Appendix for Advanced Users; Updated process of including multiple SMEs</td>
</tr>
<tr>
<td>August 1, 2017</td>
<td>1.3</td>
<td>Updated Section 3.2.2.3 to select the Edit button if Add CC is not visible.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Updated Section 1.2.2 to include the link to login to eCMS</td>
</tr>
<tr>
<td>August 8, 2017</td>
<td>1.4</td>
<td>Added Section 1.4;</td>
</tr>
<tr>
<td>December 2017</td>
<td>2</td>
<td>Updated screenshots to match new system look and feel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Incorporated process changes and updates into documentation</td>
</tr>
<tr>
<td>September 2018</td>
<td>3</td>
<td>Updates to Submittal Process; Added Site Management Instructions</td>
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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?_afrLoop=486585411355216%1%40%40%3F_afrLoop%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.

### 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, go to the Navigation Pane on the left column of the screen and open the **Communications Management** folder. 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

<table>
<thead>
<tr>
<th>Contact Code</th>
<th>Contact Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE</td>
<td>Architectural Engineer</td>
<td><a href="mailto:ecms@caci.com">ecms@caci.com</a></td>
<td></td>
</tr>
<tr>
<td>AL</td>
<td>Angelica Lingat</td>
<td><a href="mailto:angelica.lingot@caci.com">angelica.lingot@caci.com</a></td>
<td></td>
</tr>
<tr>
<td>AU</td>
<td>AE User</td>
<td><a href="mailto:ecms@caci.com">ecms@caci.com</a></td>
<td></td>
</tr>
<tr>
<td>AUS</td>
<td>AE User2</td>
<td><a href="mailto:example@example.com">example@example.com</a></td>
<td></td>
</tr>
<tr>
<td>BS</td>
<td>Bob Smith</td>
<td><a href="mailto:cmic@caci.com">cmic@caci.com</a></td>
<td>(847) 555-1212</td>
</tr>
<tr>
<td>GC</td>
<td>Government Cor</td>
<td><a href="mailto:cmic@caci.com">cmic@caci.com</a></td>
<td></td>
</tr>
<tr>
<td>NU</td>
<td>NAVFAC User</td>
<td><a href="mailto:ecms@caci.com">ecms@caci.com</a></td>
<td></td>
</tr>
<tr>
<td>SS</td>
<td>Sally Sue</td>
<td><a href="mailto:ecms@caci.com">ecms@caci.com</a></td>
<td>(847) 555-1212</td>
</tr>
<tr>
<td>WS</td>
<td>William Sloane</td>
<td><a href="mailto:william.sloane@caci.com">william.sloane@caci.com</a></td>
<td></td>
</tr>
</tbody>
</table>

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

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.

---

### 1.2.2.2 E-mail Notifications

eCMS allows users to set their notification preferences to receive emails 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 email notification settings, select the email notifications tab.

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

<table>
<thead>
<tr>
<th>Object Description</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>New</td>
</tr>
<tr>
<td>Communication</td>
<td></td>
</tr>
<tr>
<td>Daily Report</td>
<td></td>
</tr>
<tr>
<td>Field Work Directives</td>
<td></td>
</tr>
<tr>
<td>Issue</td>
<td></td>
</tr>
<tr>
<td>Meeting</td>
<td></td>
</tr>
<tr>
<td>Notice</td>
<td></td>
</tr>
<tr>
<td><strong>Punch List</strong></td>
<td>✔</td>
</tr>
<tr>
<td>Request For Information</td>
<td></td>
</tr>
<tr>
<td>Submittal</td>
<td></td>
</tr>
<tr>
<td>Transmittal</td>
<td></td>
</tr>
</tbody>
</table>

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.
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.
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. DASHBOARDS AND REPORTING

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 forward an RFI or Submittal to multiple team members
- 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 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.

The RFIs folder in the navigation pane will be bolded when new information regarding RFIs is available. Submittals have to be attached to a Issue/Internal Routing for users to receive notifications. (NOTE: Folder lists may look different than pictured above depending on the project. If eCMS is left open on a browser, refresh the browser to see new RFIs as they arrive.)
3.2.2 RFI Process

Using the navigation pane on the left side of your screen, click on RFIs. This opens the RFI Log. You can open an RFI to view by clicking on the title under the Subject column.

On the RFI Detail screen, the Received button will capture the date and time the RFI record was opened.

3.2.2.1 Responding Directly to RFIs

Review all information on the RFI Detail screen. Open the Attachments, Related Objects, and History tabs at the top of the RFI screen for more information.

Respond directly to an RFI by clicking Answer in the top, right of the screen.

A dropdown list of possible answers will display next to the GOV Disposition field.
If more details are needed, add it in the bottom of the RFI Detail screen in the box titled Answer. If no changes are needed for a RFI Proposed Solution, simply click the Accept RFI Solution button.

The following prompt will appear. Click OK to copy the RFI Solution into the Answer box.

Click Submit at the top, right corner of the screen. The RFI will show as processed and the KTR will receive a notification about the decision.

### 3.2.2.2 Forwarding RFIs to SMEs

Use the Forward function to send RFIs to an SME or a group of SMEs for feedback. The following process will also ensure that the RFI and any Internal Routing or Communications related to it are added to the SME’s Calendar and My Actions applications. Active users on the system will receive a notification when the NAVFAC user forwards the RFI or if team members assign “Internal Routing” tasks to others.

RFIs can only be forwarded to one Subject Matter Expert (SME). Once forwarded, eCMS creates a new record for internal communications and provides the RFI with a new number. This prevents the KTR from seeing information regarding that RFI, and the COR or PAR can collect feedback and provide an answer to the KTR.
Prior to the final decision, RFIs requiring additional input from SMEs can be forwarded through the eCMS system. Upon opening the RFI, select the button that says **Forward** at the top, right corner of the screen.

In the pop-up that appears, select the name of the person you would like to forward the RFI to from the drop-down menu. Check the boxes next to **Copy Notes** and **Copy Attachments** and click okay. Do not click the **Keep Numbering Sequence**, as this will alter the numbering and make it harder to find the forwarded RFI. The RFI is not forwarded until you click **Submit**.

If you’d like to add additional people to this forward you can add them on the CC function.

Update the RFI with any additional information that you would like to include such as attachments or related objects. Click submit in the top, right of the screen when finished. Users
receiving the forwarded RFI can add notes using the Add Note function at the top right, answer this RFI directly, or forward it to additional users.

Once the COR or PAR receive a response from the SME, open the forwarded RFI, and select a choice from the top of the screen to complete the process:

Each of these options serves a distinct purpose:

- **Send I/O E-mail** – this field has been disabled for NAVFAC security purposes
- **Reject Answer** - rejects the answer given
- **Add CC** - copies a User to an RFI; allows the User to edit and add notes
- **Close RFI** - closes RFI
- **Add Note** - adds a note to the bottom of the RFI
- **Update Ref. RFI** – updates the original RFI with the forwarded RFI's answer. Do not click the Copy Notes or Copy Attachments button when prompted to keep communications between the SMEs private
- **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

### 3.2.2.3 Responding to a Forwarded RFI as an SME

Open the Communication Management folder in the Navigation Pane, and then open the RFI folder. A bolded number indicates a new RFI has been received. The new RFI will be located at the top of the RFI log. Click on the subject line to open. From here, SMEs can review all the information contained in this RFI. Once everything has been reviewed they may answer this directly which would send information back to the government lead to compile and respond to the contractor, or add a note if communicating with a group or simply providing feedback. To add a note, which will not be visible to the contractor, select Add Note at the top, right of the screen.

To answer the RFI, click the Answer button in the top right corner.
Add information in the **Answer** box at the bottom or click the **Accept RFI Solution** button if you agree with the contractor’s proposed solution.

Once all information has been completed, click submit in the top right corner. This sends the RFI back to the government lead. From here to the COR or PAR will review the feedback from the SME and respond to the contractor.

### 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.

- **The first tab, RFI Detail**, has the bulk of information about the RFI
- **The Attachments** tab will have attachments sent with this RFI. 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 RFI

#### 3.2.3.1 Attachments

To view or add attachments in an RFI, click on the **Attachments** tab. To find this tab, click **RFIs** in the navigation pane, and then select the RFI 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.

![Upload Multiple](image)

Select the files to upload or drag and drop them on the screen. 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. Select the **Enter Additional Fields** button if you want to add more details, or click **Proceed** to upload.

**Individual Upload**

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

![Add/Upload New](image)
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 all 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 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 or select **Add New** to create a new object.

### 3.2.3.3 Reviewing the RFI History

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

### 3.2.4 Submittals and Transmittals

**Submittals** are identified in the contract specifications. The reviewing and approving authority for each submittal is identified in the contract specifications as well. Aside from the Contractor’s responsibility to create and submit the Submittal Register for a contract, you will also be required to use the Submittal and Issue features in the eCMS application.

The submittal process works very similar to the RFI process, except Submittals must be attached to an accompanying Issue to notify recipients to respond to or review the Submittal.

To access Submittals, go to the Navigation Pane, open Communication Management, and then select **Submittals**. From here, you can see all Submittals created on this project. In order to notify someone that a new Submittal has been created and needs review, it must be attached to an **Issue**.
3.2.4.1 Responding to an Issue

When a new Issue arrives, it will be bolded in the Navigation Pane. When you open the Issue Log, you will see new Issues bolded at the top. Click on the Issue Number to open.

This will open the Issue Detail page, which will allow you to see remarks from the sender and related objects such as RFIs, Submittals, or Daily Reports. The COR can choose to answer Submittals directly or create new Issues to request input from SMEs.

To answer a Submittal directly, first click on the Submittal Reference number in the Related Objects of the Issue.
Review all information in the Submittal. Click **Edit** on the Submittal. Use the dropdown to select the status of the Submittal and add your feedback in the comments. Click **Save**.

Return to the original **Issue** sent by the KTR. Click **Add Note**. In the note, let the contractor know that the Submittal has been answered and submit. This will notify the contractor of the update.
3.2.4.1 Creating an Issue for Subject Matter Experts to Review

From the Navigation Pane, open Communications Management and then **Issues_Internal Routing**. Click **Add Issue** at the top, right of the screen.

Enter the contact person the Issue is being sent to in the **To** line. For the **Subject**, include the Submittal Number and let the reviewer know the purpose of this communication. Add any additional remarks in the **Description** box at the bottom.

Using the dropdown arrow, select the Severity of the Issue and Type from the boxes under the **Subject** line.

To link the **Submittal**, click the **Related Objects** tab and add it using the **Assign Object** feature. More information on how to link a related object can be found in **Section 3.2.3 Attachments, Related Objects, and History**.
Once you have completed the Issue, click Submit to send to the SME. The SME reviewer will respond to this issue using the Notes to provide their feedback. This will keep the SME’s comments separate from the official answer to the KTR and information shared will be kept between those included on the distribution.

### 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.

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>Submittal No.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Contact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Returned By Partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Returned By Contact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sent To Partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sent To Contact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forwarded To Partner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Forwarded To Contact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status Code</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Cycle</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Procurement Item</td>
<td>≥</td>
<td>'Y'</td>
<td>'Y'</td>
</tr>
<tr>
<td>QC Inspect and Test Reqmt</td>
<td>≥</td>
<td>'Y'</td>
<td>'Y'</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 to sort. A list of symbols appears that 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 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.

![Enter Query Button]

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.

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

![Execute Query Button]

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. Communication 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.

Below is a brief description of each field:

- **Communication No.** – This field generates a number automatically to organize **Communications**.
- **From** – This field will contain the sender’s name.
- **To** – Using the dropdown menu, select the team member to receive this **Communication**.
- **CC** – Use this button to copy additional 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 provided 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 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.

After the response has been added, click Submit in the top, right of the screen.
3.3.4 Adding Internal Routing

Issues/Internal Routing (IR) can be used to document potential problems that may result in a project change, to communicate 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 Internal Routing.

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

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

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

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

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

**Subject** – Enter a short, descriptive title to give a synopsis of the message.
Customer Issue - Leave this field blank

Severity – Choose from Low, Normal, High, Critical, and Wishlist. Use Wishlist if it is something that would make things easier, but the job can be done without it.

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

Type – Using the dropdown, select if this issue is for Design, Documentation, Materials, Owner, Regulations, Subcontractors, Suppliers, Weather, or Other

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

Description – Describe the IR issue and tasks

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

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

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

After completing all of the required fields, click Submit in the top, right of the screen.

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.

Selecting Add Note will open a small box 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.

3.3.5 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 0 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.”
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. A new popup will appear.
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.

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

![Monthly Calendar]

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.
**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.

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

**Building Repair 10**

<table>
<thead>
<tr>
<th>ITEMS</th>
<th>GROUP BY TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-11-29</td>
<td>Request For Information ZZ-ACME-0003 Test A/E Processes</td>
</tr>
<tr>
<td>2017-11-29</td>
<td>Request For Information ZZ-ACME-0002 Test A/E Processes</td>
</tr>
<tr>
<td>2017-12-04</td>
<td>Submittal Other Actions 0008 Phone Call Submittal Name (12/4)</td>
</tr>
<tr>
<td>2017-12-04</td>
<td>Phone Call Title Test</td>
</tr>
</tbody>
</table>

**No Actions**

- **This Week** (6)
- **Following Week** (3)
- **Next 30 Days** (8)

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

### Building Repair 10

<table>
<thead>
<tr>
<th>ITEMS</th>
<th>GROUP BY DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017-11-29</td>
<td>Request For Information ZZ-ACME-0002 Test A/E Processes</td>
</tr>
<tr>
<td>2017-11-29</td>
<td>ZZ-ACME-0003 Test A/E Processes</td>
</tr>
<tr>
<td>2017-12-28</td>
<td>ZZ-ACME-0004 Test Subject</td>
</tr>
<tr>
<td>2017-12-29</td>
<td>ZZ-ACME-0007 Subject Testing</td>
</tr>
<tr>
<td>2017-12-29</td>
<td>ZZ-ACME-0006 Subject</td>
</tr>
<tr>
<td>2018-01-01</td>
<td>0017 Subject Testing</td>
</tr>
<tr>
<td>2018-01-01</td>
<td>ZZ-ACME-0012 What Color Box (testing)</td>
</tr>
<tr>
<td>2017-12-04</td>
<td>Submittal 0008 Submittal Name (12/4)</td>
</tr>
<tr>
<td>2017-12-23</td>
<td>Phone Call Call PM</td>
</tr>
<tr>
<td>2017-12-27</td>
<td>Phone Call Call PM</td>
</tr>
<tr>
<td>2017-12-27</td>
<td>Phone Call Sample Action Item</td>
</tr>
</tbody>
</table>
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.

3.6.2 Creating a New Distribution List
Create a new Distribution List by going to the Distribution Lists page under the Communication Management folder in the Navigation Pane.

In the right corner of the screen that appears, select New.

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.

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

![Table of contacts]

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

When accessing other sections of the eCMS system, such as RFIs, Communications, or Internal Routing, there is a section under the To field with a blue or gray box called CC.

![Dropdown menu]

Click on CC and a dropdown menu will appear that opens a list of team members. At the top, center, there is a button for Distribution Lists. Select this, then select the Distribution List to copy.
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.
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.”
The first field you will see is “Track.” Tracks will vary by project and are the most logical groups to organize information. You can choose to use an existing “Track” 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 tracks. Choose an existing “Track” by selecting the dropdown menu and selecting the track. To create a new track, click the plus sign next to the field.

If you choose to add a track, 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.”

You can now open the dropdown next to “Track” and select the track 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.

### 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.

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 Item Copy Example](image)

### 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.

![Attendees Addition Example](image)

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.

![Attendees Selection Example](image)
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.

3.7.6 Notes

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,” and for Attachments, click “Upload Multiple,” or “Add/Upload New.”

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. DOCUMENT MANAGEMENT

4.1. 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.

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.

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

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

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.

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

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. SITE MANAGEMENT

5.1. 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.

5.2. 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.
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.

5.2.1 Information in a Daily Report

5.2.1.1 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.

<table>
<thead>
<tr>
<th>Report No.</th>
<th>The Report No. is filled in automatically.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>The Date is also automatically filled in with the day the report is created.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Prepared By</th>
<th>The Prepared By section shows the name of the user creating the report.</th>
</tr>
</thead>
</table>
Sky
Use the dropdown (magnifying glass icon) to select the sky conditions for the day.

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

Precipitation (F)
Log total precipitation for the day in inches.

Rain Day
Select this button if there is rain.

Low Temperature (F)
Enter the minimum temperature for the day.

High Temperature (F)
Enter the maximum temperature for the day.

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

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

5.2.1.2 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.

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.

<table>
<thead>
<tr>
<th>General</th>
<th>Tasks</th>
<th>Own Equipment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action</strong></td>
<td><strong>Company</strong></td>
<td><strong>Contractor</strong></td>
</tr>
<tr>
<td>🔄 + 🔄</td>
<td>Subcontractor</td>
<td>ABC Co.</td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th>Work Date</th>
<th>No. of Workers</th>
<th>Man-Hours</th>
<th>OT Hours</th>
<th>Total Man-Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>08/</td>
<td>3</td>
<td>8</td>
<td>2</td>
<td>30</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total as of Report Date</td>
</tr>
<tr>
<td>Project Total</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>Notes</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q</td>
<td>Additional notes here.</td>
<td>+</td>
</tr>
</tbody>
</table>

**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.
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.

![Table: Company, Schedule Activity No., Owner](image)

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.

![Table: Tran Code, Job, Phase, Cat, Hours Used, Notes](image)

**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.

![Table: Action, Owner, Construction Equipment](image)

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

![Table: Owner, Construction Equipment](image)
If you need additional room for information or additional details, use the **Description** field.

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Information</td>
</tr>
</tbody>
</table>

**Materials**

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Select</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Plus Sign]</td>
<td>![Check Mark]</td>
<td>![Magnifying Glass]</td>
</tr>
</tbody>
</table>

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.

**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.

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

**Quantity**  
Indicate how many units of the material are being used.
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.

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

Select the time materials were delivered.

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

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

Type in the Vendor’s Name.

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

If using release forms, document them here.

Indicate the line item being purchased.
Notes
Record any comments or notes associated with the Notes.

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

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

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

<table>
<thead>
<tr>
<th>Action</th>
<th>QC Phase (note: link preparatory and initial phase checklists in the Checklists Folder)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>INITIAL</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Work Complies with Contract</th>
<th>Work Complies with Safety</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>

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.

| For Follow-up provide 1) Description of Work, 2) Testing Performed & by Whom, 3) Spec Sec, 4) Location, and 5) List of Personnel Present |
| 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. |

1) Description of Work, 2) Testing Performed | Description |

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.

5.2.1.3 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.

## 5.3. Punchlists and Testing Logs

### 5.3.1 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.

### 5.3.2 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**.

Fill in the required fields. Below is a short description of each field.
**Punchlist No.** - This is the auto-generated number of the Punchlist.

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

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

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

**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.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Refer to **Section 3.2.3.2** to add any **Attachments** or **Related Objects** to the Punchlist.
5.4. 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.

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

The first four fields will autopopulate 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.
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.

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.

### 5.5. Checklists

**Checklists** are used for inspection and to keep the project on track. To locate **Checklists**, select the **Site Management** folder.
Then, click **Checklists**. The following are the **Checklists** that are currently available.

<table>
<thead>
<tr>
<th>Checklists</th>
</tr>
</thead>
<tbody>
<tr>
<td>KTR_QC Preparatory Phase</td>
</tr>
<tr>
<td>KTR_QC Initial Phase</td>
</tr>
<tr>
<td>GOV_QA Green Zone_Preconstruction</td>
</tr>
<tr>
<td>KTR_Safety Contractor Self-Assessment</td>
</tr>
<tr>
<td>GOV_QA Report</td>
</tr>
<tr>
<td>GOV_Quality Assurance Surveillance Plan (QASP/CPARS)</td>
</tr>
<tr>
<td>GOV_QA Red Zone</td>
</tr>
</tbody>
</table>

### 5.5.1 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.

Fill in the required fields of the upper half of the Checklist. A short description of the top fields is provided below.
Checklist No. – An auto-generated number for this specific Checklist

Created Date – The date the Checklist was created

Created By – Indicates the user who created the Checklist

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.

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.
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.