



**CONTENT  
MANAGEMENT**



**APPROACH**

birth

**CRAWL...**

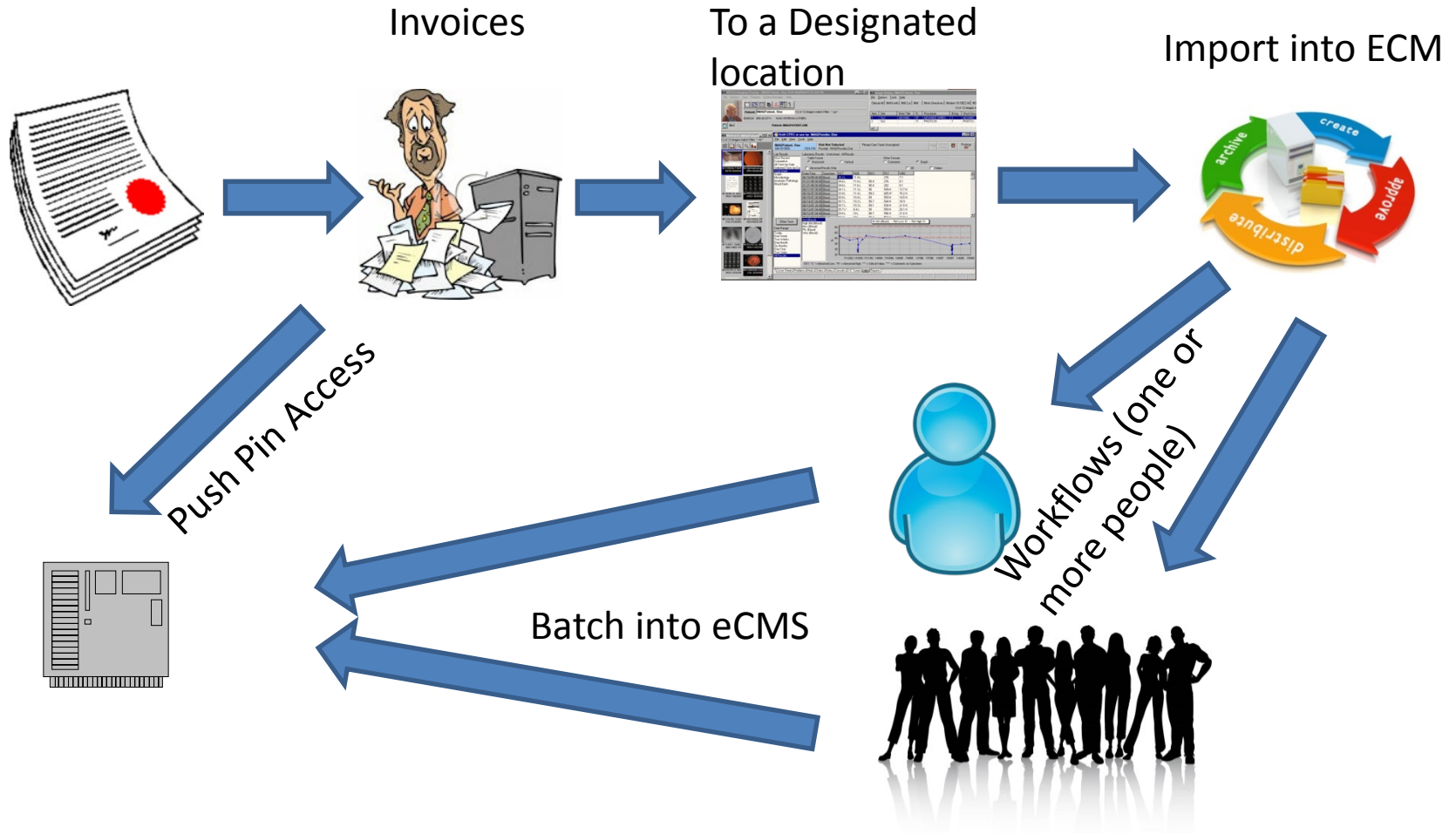
**WALK...**

jog

**RUN...**

# eCMS Process Overview

KIS Principle – Keep It Simple





# eCMS



- Crawl...  
(birth)

## —Scope

- Engage CGC to setup CM and PC-2
- Define scanning process and setup copiers
- Identify documents to scan
- Identify users that touch (or approve) these documents
- Develop user documentation for scanning process



# eCMS



- Crawl...  
(birth)

## – CGC Assistance...

- Review on-prem setup and status for using eCM and PC2
- Ensure Web2 security setup for our control group
- Setup and test basic Content Manage query (INVREG)
- Test and train group on basic workflow setup in CM



# eCMS

- Walk...



## – Process...

- Setup two basic workflows (for IT and Administration) using
  - ECM/Content Management
  - ECM/Workflow



# eCMS

- Walk...



← → ↻ ⓘ Not secure | 10.50.4.9:10000/ecms/cms/menu/displayMenuNav.faces

Donald Thurman  
07/000 - IVEY MECHANICAL COMPANY

Content Management  
CM Workflow  
Imaging  
StreamBIM  
Workflow

BI eCMS CM

The screenshot shows a web browser window displaying the eCMS application. The browser address bar shows the URL 10.50.4.9:10000/ecms/cms/menu/displayMenuNav.faces. The application header includes the user name Donald Thurman and the company name IVEY MECHANICAL COMPANY. A navigation menu is visible, with 'Content Management' and 'CM Workflow' highlighted. The main content area features three large blue circular icons: 'BI' (Business Intelligence) with a bar chart, 'eCMS' (Enterprise Content Management System) with a circular arrow, and 'CM' (Content Management) with a sunburst. The background of the slide has a light blue diagonal line pattern.



# eCMS

- Walk...



ECMS Web - Invoice Register - Google Chrome

Not secure | 10.50.4.29:8015/default.aspx?menuPath=/Content%20Management&menuRootPath=/Content%20Management&a=a7bdf1ce-665b-4a68-bf4c-4f0050ca0ea9&besgr...

Donald Thurman | Ivey Mechanical, Inc. | Invoice Register

ECMS

Navigation

- Content Management
  - Invoice Register
  - Invoice Register-Detail
    - Corporate
    - Tenders
    - Projects
    - Employee Documents
  - Notifications

Invoice Register List

Tools View As Ivey Invoice View 475 records

ID	Status	DocReg ...	Company/Div	Date Received	Invoice Date	Due Date	Supplier	Supplier Na
859	Submitted	INV	7/0	10/02/2019 11:38	09/25/2019	10/18/2019 8633	WASTE MAT	
858	Submitted	INV	7/0	10/02/2019 11:38	10/01/2019	10/04/2019 26798	Fuse.Cloud	
857	Submitted	INV	7/0	10/02/2019 11:38	09/15/2019	10/02/2019 21079	THE SOLUTI	
856	Submitted	INV	7/0	10/02/2019 11:38	09/11/2019	10/04/2019 24944	PCM SALES	
855	Submitted	INV	7/0	10/02/2019 11:38	09/09/2019	10/03/2019 24944	PCM SALES	
854	Submitted	INV	7/0	10/02/2019 11:38	09/23/2019	10/15/2019 24944	PCM SALES	
853	Approved	INV	7/0	09/30/2019 11:10	09/25/2019	10/01/2019 24020	MEMPHIS C	
850	Approved	INV	7/0	09/30/2019 09:18	09/24/2019	10/18/2019 15586	MAILFINAN	
849	Approved	INV	7/0	09/30/2019 09:18	09/24/2019	10/01/2019 24020	MEMPHIS C	
848	Approved	INV	7/0	09/30/2019 09:18	09/19/2019	10/11/2019 347	AT&T	
847	Approved	INV	7/0	09/30/2019 09:18	09/19/2019	10/11/2019 347	AT&T	
846	Approved	INV	7/0	09/27/2019 10:38	09/26/2019	09/27/2019 7329	PANOLA PA	
845	Approved	INV	7/0	09/26/2019 13:30	09/01/2019	09/26/2019 20968	GRANITE TE	
827	Approved	INV	7/0	09/24/2019 10:47	09/24/2019	10/03/2019 65114	SCARBOROI	
818	Approved	INV	7/0	09/24/2019 10:35	09/24/2019	10/10/2019 65114	SCARBOROI	
817	Approved	INV	7/0	09/24/2019 10:34	09/24/2019	09/25/2019 25148	MAYHEW EI	
816	Approved	INV	7/0	09/24/2019 10:34	09/24/2019	10/10/2019 65114	SCARBOROI	
810	Approved	INV	7/0	09/23/2019 11:04	09/17/2019	10/01/2019 24444	COMCAST	
809	Approved	INV	7/0	09/23/2019 11:04	09/19/2019	09/12/2019 14995	RJ YOUNG C	
808	Approved	INV	7/0	09/23/2019 11:04	09/18/2019	09/11/2019 14995	RJ YOUNG C	
807	Approved	INV	7/0	09/20/2019 10:59	09/11/2019	10/04/2019 347	AT&T	
806	Approved	INV	7/0	09/20/2019 10:36	09/19/2019	09/25/2019 7329	PANOLA PA	
802	Approved	INV	7/0	09/20/2019 08:49	09/14/2019	09/25/2019 18585	UPS	
801	Approved	INV	7/0	09/20/2019 08:49	09/07/2019	09/25/2019 18585	UPS	
800	Approved	INV	7/0	09/20/2019 08:36	09/04/2019	09/19/2019 24403	FEDEX	
799	Approved	INV	7/0	09/18/2019 10:50	09/11/2019	09/25/2019 26287	COMCAST	





# eCMS

- Walk...



ECMS Web - 1.Workflow Master - Google Chrome

Not secure | 10.50.4.29:8015/default.aspx?menuPath=/Workflow&menuRootPath=/Workflow&\_a=012ac039-63ec-4185-a3e3-39dce1e7a04d&besgroup=ECMS

Donald Thurman | Ivey Mechanical, Inc. | 1.Workflow Master

ECMS

Workflow Master

Add Edit Delete

INVREG	Type	Sub Type	Description	Usage
INVREG	INVREG		Invoice Register	Standard
INVREG	INVREG	Corp2FAB	Invoices Orig in Corp to FAB	Standard
INVREG	INVREG	CorpRej	Any reject to Michelle	Standard
INVREG	INVREG	FAB	Invoices Originating in FAB	Standard
INVREG	INVREG	FAB RE-B	Use to re-batch invoices for F	Standard
INVREG	INVREG	FABRejec	FAB Reject to Rhonda	Standard
INVREG	INVREG	IT	IT Invoices (3 stage)	Standard
INVREG	INVREG	JDMTRKIN	Invoices specific to JDM Trkin	Standard
INVREG	INVREG	Non-IT	Non-IT Invoice (2 Stage)	Standard
INVREG	INVREG	Re-Batch	Use to re-batch invoices	Standard



# eCMS

- Walk...



ECMS Web - 1.Workflow Master - Google Chrome

Not Secure | 10.50.4.29:8015/default.aspx?menuPath=/Workflow&menuRootPath=/Workflow&a=012ac039-63ec-4185-a3e3-39dce1e7a04d&besgroup=ECMS

Donald Thurman | Ivey Mechanical, Inc. | 1.Workflow Master

ECMS

Navigation

- Workflow
  - My Approvals Queue
  - 1.Workflow Master
  - 2.Enable Workflow
  - 3.Workflow Rules
  - Workflow Sub Types
  - Checked out items
  - Proxy
  - Queue
  - Organization Maintenance
  - Invoice W/ Reports

Workflow Master

Add Edit Delete

INVREG	Type	Sub Type	Description	Usage
INVREG	INVREG		Invoice Register	Standard
INVREG	INVREG	Corp2FAB	Invoices Orig in Corp to FAB	Standard
INVREG	INVREG	CorpRej	Any reject to Michelle	Standard
INVREG	INVREG	FAB	Invoices Originating in FAB	Standard
INVREG	INVREG	FAB RE-B	Use to re-batch invoices for F	Standard
INVREG	INVREG	FABRejec	FAB Reject to Rhonda	Standard
INVREG	INVREG	IT	IT Invoices (3 stage)	Standard
INVREG	INVREG	JDMTRKIN	Invoices specific to JDM Trkin	Standard
INVREG	INVREG	Non-IT	Non-IT Invoice (2 Stage)	Standard
INVREG	INVREG	Re-Batch	Use to re-batch invoices	Standard



# eCMS

- Walk...



ECMS Web - 3.Workflow Rules - Google Chrome

Not secure | 10.50.4.29:8015/default.aspx?menuPath=/Workflow&menuRootPath=/Workflow&a=012ac039-63ec-4185-a3e3-39dce1e7a04d&besgroup=ECMS

Donald Thurman | Ivey Mechanical, Inc. | 3.Workflow Rules

ECMS

Workflow Rules

Add Edit Delete

Rule	Sub Rule	Stage	User	Lower	Limit	Due After	Alarm After	Comment
INVREG	Corp2FAB	1	RMILNER35	0.00	5,000,000.00	1		1 Rhonda Milner (route FAB Invoices)
invreg	Corp2FAB	2	DPMOORE35	0.00	0.00	1		1 Destin Moore (FAB Sheet Metal Invoices)
INVREG	Corp2FAB	2	HMYERS35	0.00	0.00	1		1 Holland Myers invoices
INVREG	Corp2FAB	2	SBARNHIL35	0.00	0.00	1		1 Steve Barnhill (Admin Invoices)
INVREG	Corp2FAB	2	TBURRELL35	0.00	0.00	1		1 Todd Burrell (FAB Pipe Invoices)
INVREG	Corp2FAB	2	TGRAHAM35	0.00	0.00	1		1 Tressia for Fab Invoices that don't belong to FAB
INVREG	Corp2FAB	3	RMILNER35	0.00	5,000,000.00	1		1 Rhonda to batch FAB Invoices
INVREG	CorpRej	1	TGRAHAM35	0.00	0.00	1		1 Reject Workflow for Corp
INVREG	FAB	1	DPMOORE35	0.00	0.00	1		1 FAB Workflow for Sheet Metal
INVREG	FAB	1	HMYERS35	0.00	0.00	1		1 Fab workflow for Plumbing
INVREG	FAB	1	SBARNHIL35	0.00	0.00	1		1 Fab workflow for Admin
INVREG	FAB	1	TBURRELL35	0.00	0.00	1		1 FAB Route to Pipe
INVREG	FAB	2	RMILNER35	0.00	5,000,000.00	1		1 Workflow for Rhonda to Batch FAB
INVREG	FAB RE-B	1	RMILNER35	5,000,000.00	5,000,000.00	1		1 RE-Batch tool for invoices
INVREG	FABRejec	1	RMILNER35	0.00	0.00	1		1 Reject Sub-Type for Rhonda
INVREG	IT	1	JLB350	0.00	0.00	1		3 Scanned Invoice to Luther



# eCMS

- Walk...



ECMS Web - 2.Enable Workflow - Google Chrome

Not secure | 10.50.4.29:8015/default.aspx?menuPath=/Workflow&menuRootPath=/Workflow&a=733486c9-a375-41b3-b3e9-eec59285f602&besgroup=ECMS

Donald Thurman | Ivey Mechanical, Inc. | 2.Enable Workflow

Workflow Maintenance

Sub Types

Company	INVREG	Sub Type	Description	Activate
00	INVREG		Invoice Register	<input checked="" type="checkbox"/>
00	INVREG	Corp2FAB	Invoices Orig in Corp to FAB	<input checked="" type="checkbox"/>
00	INVREG	CorpRej	Any reject to Michelle	<input checked="" type="checkbox"/>
00	INVREG	FAB	Invoices Originating in FAB	<input checked="" type="checkbox"/>
00	INVREG	FAB RE-B	Use to re-batch invoices for F	<input checked="" type="checkbox"/>
00	INVREG	FABRejec	Reject workflow for FAB	<input checked="" type="checkbox"/>
00	INVREG	IT	IT	<input checked="" type="checkbox"/>
00	INVREG	JDMTRKIN	Invoices specific to JDM	<input checked="" type="checkbox"/>
00	INVREG	Non-IT	Non-IT Invoice (2 Stage)	<input type="checkbox"/>
00	INVREG	Re-Batch	To use when batch deleted	<input checked="" type="checkbox"/>

Workflow Grapical Display

Workflow: INVREG  
Subflow: IT

```
graph TD; Start([Start]) --> Stage1[Stage 1]; Stage1 --> Burrell350[Burrell 350]; Burrell350 --> Stage2[Stage 2]; Stage2 --> Thurman[Thurman Turner Construction LLC]; Stage2 --> Graham[Graham Limit: 5000000]; Thurman --> Stage3[Stage 3]; Graham --> Stage3; Stage3 --> End([End]);
```



# eCMS

- Walk...



## – Process...

- Setup two basic workflows (for IT and Administration)
  - ECM/Content Management
  - ECM/Workflow
- Beta Test with control group
- Develop User/Operation Manual
- Expand workflows to route to more than two users
- Test/Troubleshooting/Notifications



# eCMS

- Walk...



ECMS Web - 2.Enable Workflow - Google Chrome

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Donald Thurman | Ivey Mechanical, Inc. | 2.Enable Workflow

Workflow Maintenance

Sub Types

Company	INVREG	Sub Type	Description	Activate
00	INVREG		Invoice Register	<input checked="" type="checkbox"/>
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00	INVREG	CorpRej	Any reject to Michelle	<input checked="" type="checkbox"/>
00	INVREG	FAB	Invoices Originating in FAB	<input checked="" type="checkbox"/>
00	INVREG	FAB RE-B	Use to re-batch invoices for F	<input checked="" type="checkbox"/>
00	INVREG	FABRejec	Reject workflow for FAB	<input checked="" type="checkbox"/>
00	INVREG	IT	IT	<input checked="" type="checkbox"/>
00	INVREG	JDMTRKIN	Invoices specific to JDM	<input checked="" type="checkbox"/>
00	INVREG	Non-IT	Non-IT Invoice (2 Stage)	<input type="checkbox"/>
00	INVREG	Re-Batch	To use when batch deleted	<input checked="" type="checkbox"/>

Workflow Grapical Display

Workflow: INVREG  
Subflow: IT

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```



# eCMS

- Walk...



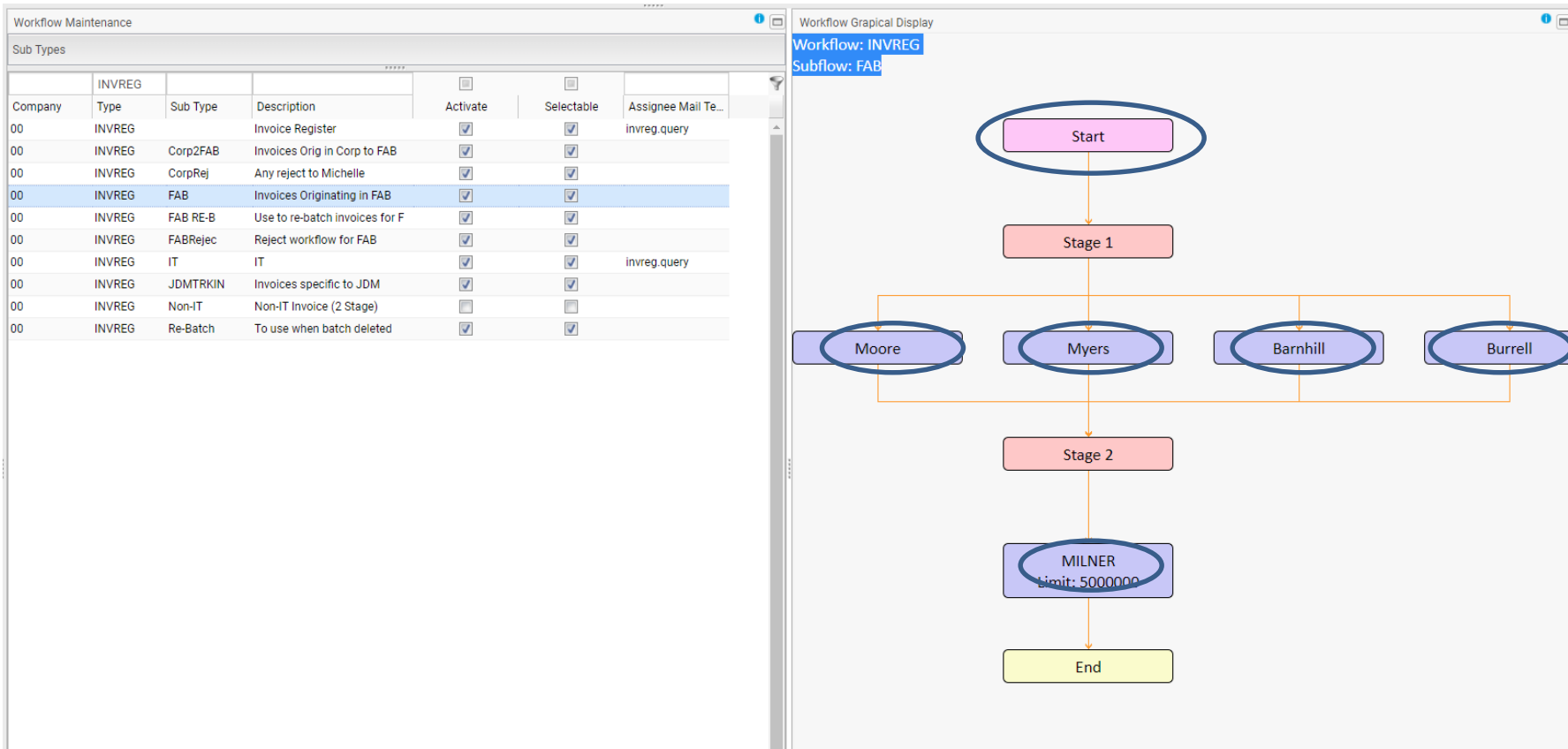
## – Process...

- Setup two basic workflows (for IT and Administration)
  - ECM/Content Management
  - ECM/Workflow
- Beta Test with control group
- Develop User/Operation Manual
- Expand workflows to route to more than two users
- Test/Troubleshooting/Notifications



# eCMS

- Walk...







# eCMS

- Walk...



## – Process...

- Setup two basic workflows (for IT and Administration)
  - ECM/Content Management
  - ECM/Workflow
- Beta Test with control group
- Develop User/Operation Manual
- Expand workflows to route to more than two users
- Test/Troubleshooting/**Notifications**



# eCMS

- Walk...



ECMS Web - Notifications - Google Chrome

Not secure | 10.50.4.29:8015/default.aspx?menuPath=/Content%20Management&menuRootPath=/Content%20Management&a=dd6b0d8e-9ca0-4256-9df7-ba0c094a4490&besg...

Donald Thurman | Ivey Mechanical, Inc. | Notifications

ECMS

Navigation

- Content Management
  - Invoice Register
  - Invoice Register-Detail
  - Corporate
  - Tenders
  - Projects
  - Employee Documents
  - Notifications

Subscribe

Add

Description	Frequency	Aggregate?	Scheduled Date/Time	Disabled?
Tell 'Luther Burrell 350' About JLB350 Workflow INVREG IT Items By Due Date	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Donald Thurman' About DTHURMAN35 Workflow INVREG IT Items By Due Date	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Tressia Graham' About TGRAHAM35 Workflow INVREG IT Items By Due Date	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Tressia Graham' About TGRAHAM35 Workflow INVREG Corp2FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'RHONDA MILNER' About RMILNER35 Workflow INVREG Corp2FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Todd Burrell' About TBURRELL35 Workflow INVREG Corp2FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Destin Moore' About DPMOORE35 Workflow INVREG Corp2FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Steve Barnhill' About SBARNHIL35 Workflow INVREG Corp2FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Holland Myers' About HMYERS35 Workflow INVREG Corp2FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Todd Burrell' About TBURRELL35 Workflow INVREG FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'RHONDA MILNER' About RMILNER35 Workflow INVREG FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Holland Myers' About HMYERS35 Workflow INVREG FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Destin Moore' About DPMOORE35 Workflow INVREG FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Steve Barnhill' About SBARNHIL35 Workflow INVREG FAB Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'RHONDA MILNER' About RMILNER35 Workflow INVREG JDMTRKIN Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Todd Burrell' About TBURRELL35 Workflow INVREG JDMTRKIN Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Destin Moore' About DPMOORE35 Workflow INVREG JDMTRKIN Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>
Tell 'Holland Myers' About HMYERS35 Workflow INVREG JDMTRKIN Items	Daily	<input checked="" type="checkbox"/>	10/02/2019 12:00	<input type="checkbox"/>



# eCMS

- Walk...



**From:** Collaborator

**Sent:** Wednesday, October 09, 2019 1:00 PM

**To:** Donald Thurman

**Subject:** DTHURMAN35 Workflow INVREG/IT Items Due Today

Id	Assignee	Type	Supplier	Added	Due	Alarm
<a href="#">966</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	PCM SALES, INC.	10/8/2019	10/9/2019	10/9/2019
<a href="#">968</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	PCM SALES, INC.	10/8/2019	10/9/2019	10/9/2019
<a href="#">1017</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	BCI	10/8/2019	10/9/2019	10/9/2019
<a href="#">1030</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	THE CONFERENCE GROUP	10/8/2019	10/9/2019	10/9/2019
<a href="#">1032</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	AT&T	10/8/2019	10/9/2019	10/9/2019
<a href="#">1033</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	AT&T	10/8/2019	10/9/2019	10/9/2019
<a href="#">1034</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	RJ YOUNG COMPANY	10/8/2019	10/9/2019	10/9/2019
<a href="#">1035</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	RJ YOUNG COMPANY	10/8/2019	10/9/2019	10/9/2019
<a href="#">1037</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	PCM SALES, INC.	10/8/2019	10/9/2019	10/9/2019
<a href="#">1038</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	C SPIRE BUSINESS SOLUTION	10/8/2019	10/9/2019	10/9/2019
<a href="#">1039</a>	<a href="#">DTHURMAN35</a>	INVREG/IT	eFAX CORPORATE	10/8/2019	10/9/2019	10/9/2019



# eCMS



- Run

(jog)

## – Refine Workflows

- Create re-batch workflows
- Work with CGC on Summary Notification emails
- Expand routing (new workflows)

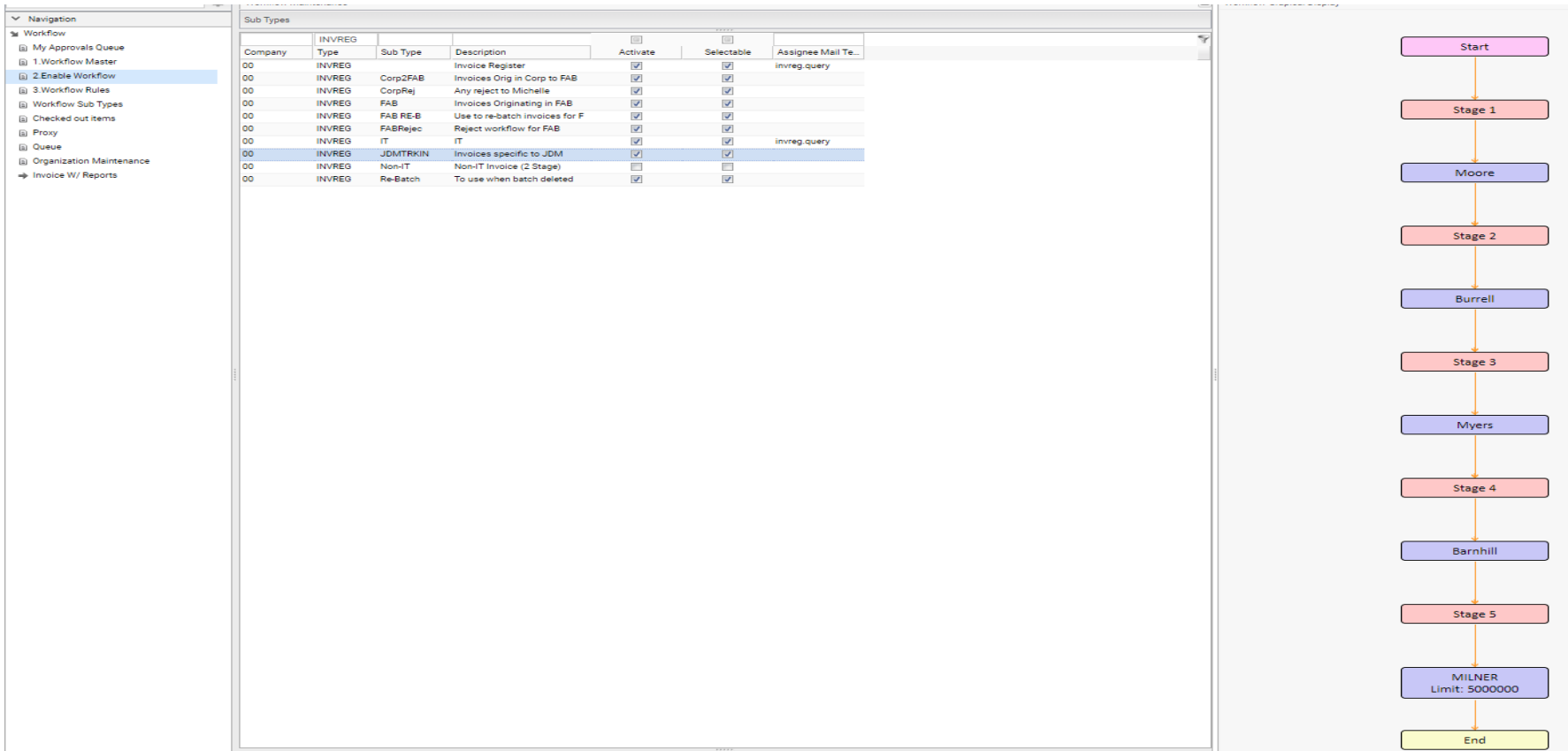
## – Production

- Create workflows for next business unit (FAB)
- Develop documentation and train users on process
- Customize workflows to meet the needs of routing for various non-PO invoices



# eCMS

- Walk...





# eCMS



- Run

## — Future Growth

- Utilize global parameters instead of individual names
- Utilize workflows across company projects
- Eventually expand non-PO invoices to PO invoices



# eCMS

- Walk...



## – Lessons Learned...

- Navigation under Content Management is still fuzzy
- IDI Queries can be helpful but difficult to understand
- We were encumbered by limited or scattered documentation
- Workflows are relatively easy but have a number of steps
- We had to develop our own user documentation
- Notifications are two-fold (workflow vs Content Management)
- Setup of the system and workflows is very detail-oriented

# Questions

- Q/A



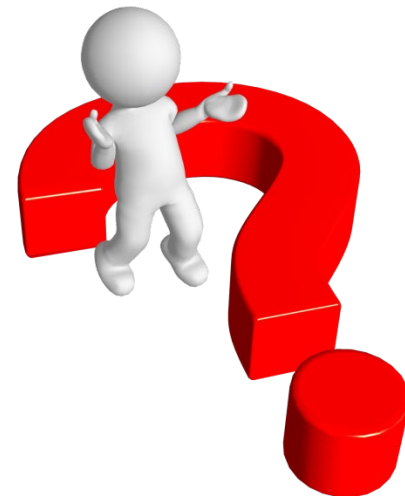
??



Essential Questions



What are they and how do you write one?







**PROJECT  
COLLABORATOR  
(PC-2)**



APPROACH

birth

CRAWL...

WALK...

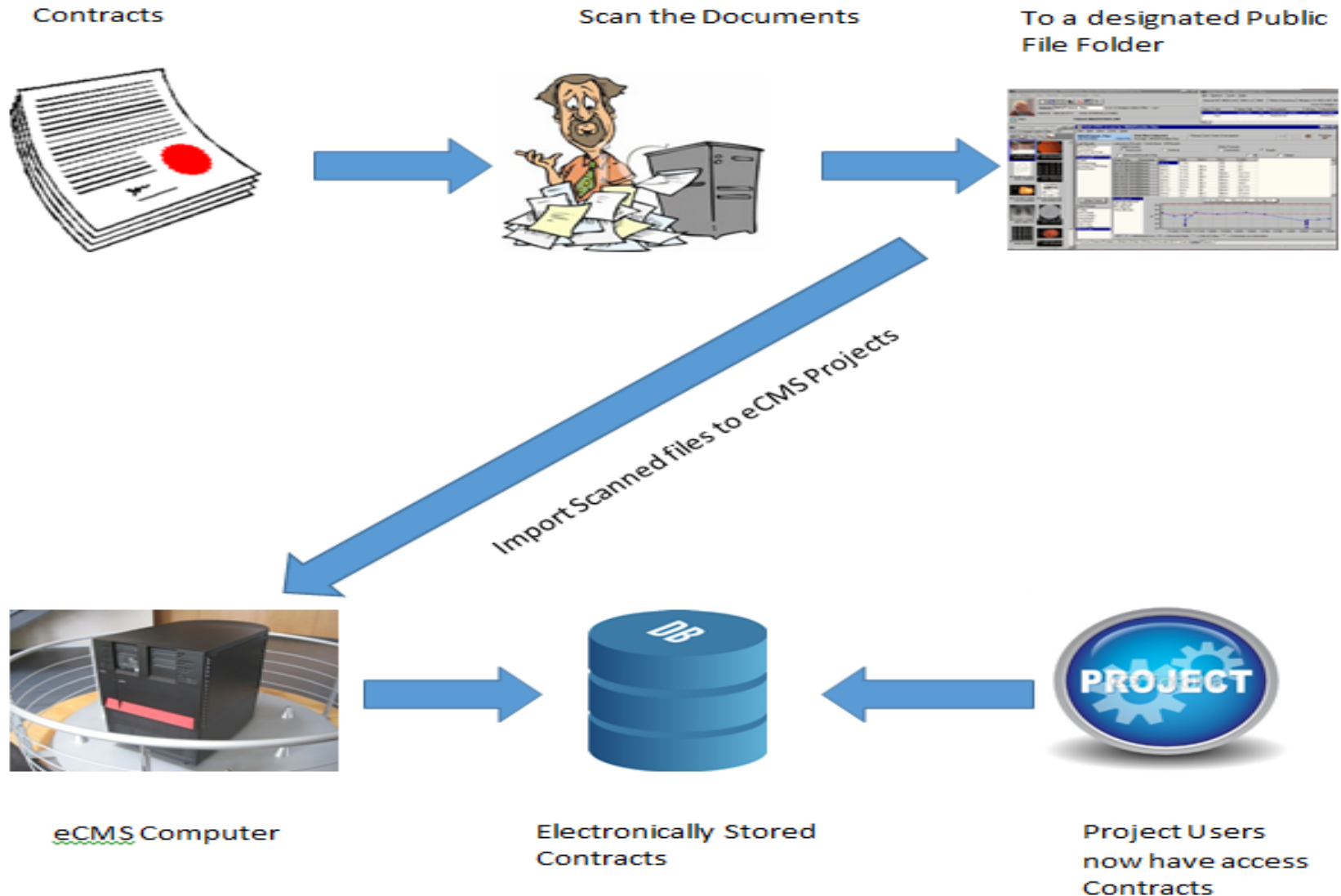
jog

RUN...

P-r-a-y

# PC-2 Process Overview

KIS Principle – Keep It Simple





# PC-2



- Crawl...  
(birth)

## —Scope

- Setup – Work with CGC to make sure PC-2 exchanged information
  - Forms, Email exchange, documents, security
- Define the “landing screen” or “dashboard” for our specific project
- Understand all of the ‘tabs’ and what each did
- Identify users
- Document a Users/Operations Manual for PM’s to use



# PC-2



- Crawl...  
(birth)

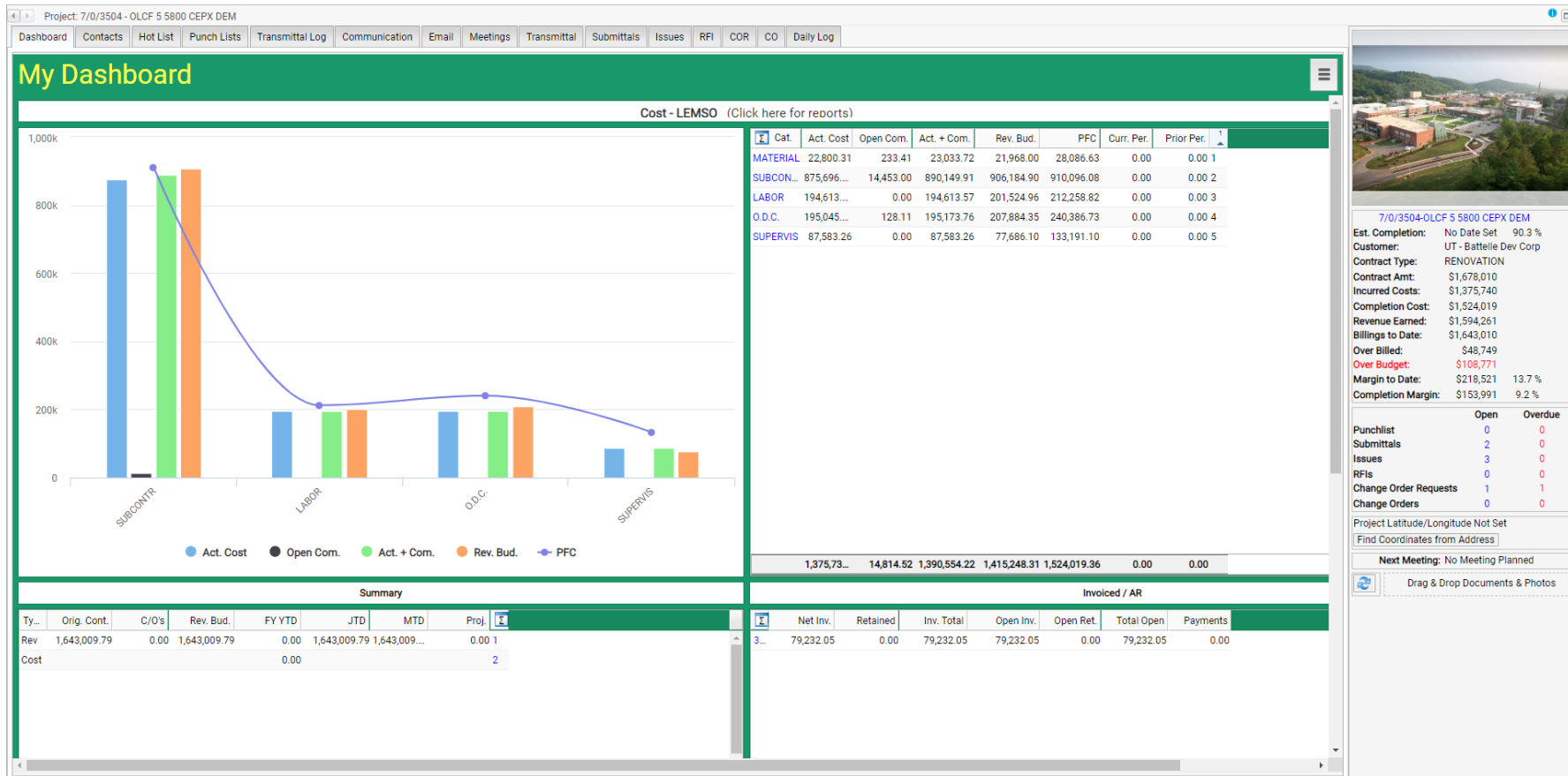
## —Scope

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# PC-2

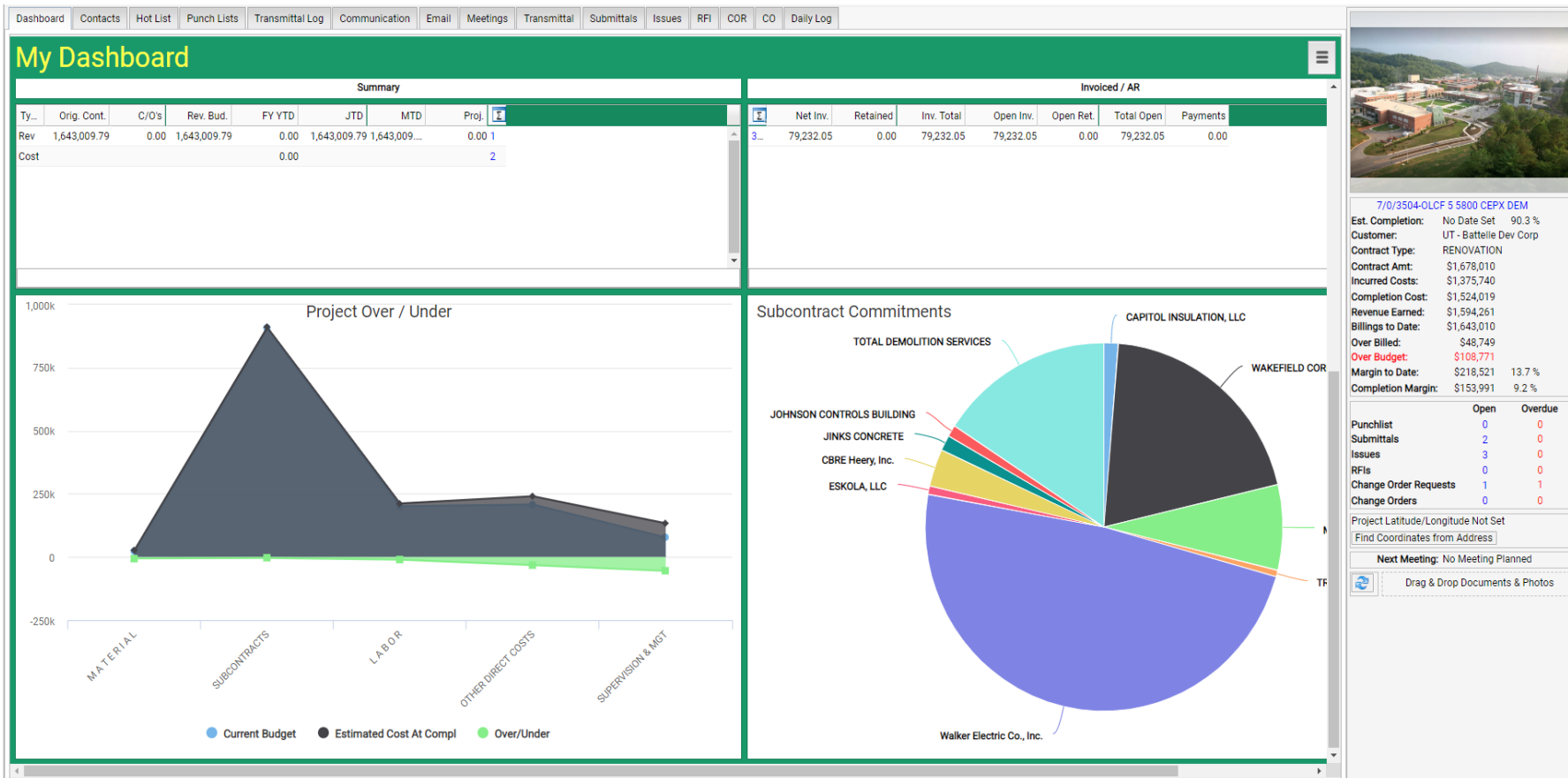
- Crawl...  
(birth)





# PC-2

- Crawl...  
(birth)





# PC-2



- Crawl...  
(birth)

## —Scope

- Setup – Work with CGC to make sure PC-2 exchanged information
  - Forms, Email exchange, documents, security
- Define the “landing screen” or “dashboard” for our specific project
- Understand all of the ‘tabs’ and what each did
- Identify users
- Document a Users/Operations Manual for PM’s to use





# PC-2

- Crawl...  
(birth)



Project: 7/0/3504 - OLCF 5 5800 CEPX DEM

Dashboard | Contacts | Hot List | Punch Lists | Transmittal Log | Communication | Email | Meetings | Transmittal | Submittals | Issues | RFI | COR | CO | Daily Log

7/0/3504 - Contacts

Select None

Client (0)

Internal (4)

Subcontractor (0)

Supplier (0)

Add ▼ Delete Organisations Contacts

Tools View As Default \*

4 records

Name ^ 2	Type ^ 1	Organisation ^ 2	Project Role
Mr David Pentecost	Internal	Ivey Mechanical (Trinity)	
Mr David Steinert	Internal	Ivey Mechanical Company	
Mr Donald Thurman	Internal	Ivey Mechanical Company	
Ms LaQuitta Rimmer	Internal	Ivey Mechanical Company	

7/0/3504-OLCF 5 5800 CEPX DEM

Est. Completion: No Date Set 90.3 %  
Customer: UT - Battelle Dev Corp  
Contract Type: RENOVATION  
Contract Amt: \$1,678,010  
Incurred Costs: \$1,375,740  
Completion Cost: \$1,524,019  
Revenue Earned: \$1,594,261  
Billings to Date: \$1,643,010  
Over Billed: \$48,749  
Over Budget: \$108,771  
Margin to Date: \$218,521 13.7 %  
Completion Margin: \$153,991 9.2 %

	Open	Overdue
Punchlist	0	0
Submittals	2	0
Issues	3	0
RFIs	0	0
Change Order Requests	1	1
Change Orders	0	0

Project Latitude/Longitude Not Set  
Find Coordinates from Address

Next Meeting: No Meeting Planned

Drag & Drop Documents & Photos



- 
- A black silhouette of a baby crawling on all fours, facing right. The baby is in a low, forward-leaning position with its arms and legs extended.

7/0/3504-OLCF 5 5800 CEPX DEM

Est. Completion:	No Date Set	90.3 %
Customer:	UT - Battelle Dev Corp	
Contract Type:	RENOVATION	
Contract Amt:	\$1,678,010	
Incurring Costs:	\$1,375,740	
Completion Cost:	\$1,524,019	
Revenue Earned:	\$1,594,261	
Billings to Date:	\$1,643,010	
Over Billed:	\$48,749	
Over Budget:	\$108,771	
Margin to Date:	\$218,521	13.7 %
Completion Margin:	\$153,991	9.2 %

	Open	Overdue
Punchlist	0	0
Submittals	2	0
Issues	3	0
RFIs	0	0
Change Order Requests	1	1
Change Orders	0	0

Project Latitude/Longitude Not Set

Find Coordinates from Address

Next Meeting: No Meeting Planned



### Drag & Drop Documents & Photos



# PC-2



- Crawl...  
(birth)

Project: 7/0/3504 - OLCF 5 5800 CEPX DEM

Navigation: Projects, Project Reports, Project Listings, PC2, Project Documents, Change Order Requests By Project, Markups, Forms, Daily Report Form, Work Authorization, Sample Letter to State Employment..., Notice to Contractors and Subcontra..., Issue of Safety Equipment, Employee Information Check Sheet, Documentation of Verbal Communic..., Background Check, Equal Employment Opportunity Data..., Co-worker Warning Reprimand Form, Expense Report, Leave of Absence Form, Certification of Physician or Practitio..., Journal Entry, Weekly Safety Meeting, Performance Profile, Project Plan Summary

Daily Log

Form	Drn0	Sub Job	Client	Date	Project Name	DOW	Field19	Field21	Field23	Scondition	temp	Tod	suprnt	Sup Desc	Fornt	For Desc	Joulbl	journeydesc	Job NO.	Sub
View	0			09/11/2018		0							0		0	0	0			
View	0			09/12/2018		0							0		0	0	0			
View	0			09/12/2018		0							0		0	0	0			
View	4			11/08/2018		1	Windy					AM	0		0	0	0		7/0/3504	
View	4	0000	ORNL	11/08/2018	OLCF 5 5800 CEPX DEM	1	Rain	No	No	Congested/Muddy		AM	0		1	0	1		7/0/3504	Superinten
View	90,226			02/26/2019	OLCF 5 5800 CEPX DEM	1	Rain				NaN	AM	2		0	0	0		7/0/3504	Superinten
View	5		Oakridge Laboratory	03/14/2019	ORNL project	1	Rain			Clear	NaN	AM	0		0	0	0		7/0/3504	
View	19,011,701		Oakridge Labs	04/18/2019		0	Rain				NaN	AM	0		0	0	0		7/0/3504	
View	19,041,802			04/18/2019		0	Rain				NaN	AM	0		0	0	0		7/0/3504	

7/0/3504-OLCF 5 5800 CEPX DEM

Est. Completion: No Date Set 90.3 %  
Customer: UT - Battelle Dev Corp  
Contract Type: RENOVATION  
Contract Amt: \$1,678,010  
Incurred Costs: \$1,375,740  
Completion Cost: \$1,524,019  
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	Open	Overdue
Punchlist	0	0
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Issues	3	0
RFIs	0	0
Change Order Requests	1	1
Change Orders	0	0

Project Latitude/Longitude Not Set  
Find Coordinates from Address

Next Meeting: No Meeting Planned

Drag & Drop Documents & Photos



# PC-2

- Crawl...  
(birth)



Donald Thurman | Ivey Mechanical, Inc. | Daily Report Form

Navigation: Projects, Forms, Daily Report Form

### Daily Construction Report

Form No.- 13  
Daily Report

Daily Report No. [ ] Job No. 7/0/3504

Client: [ ]

Date: 10/03/2019

Project Name: [ ]

Day Of Week: [ ]

Weather: [ ]

Temperature: [ ] AM

Safety: Unsafe conditions [ ] Any injuries reported [ ] Safety concerns listed on separate sheet [ ]

Site Conditions: [ ]

attment

Employee Count	Description of work and area
Superintendent	
Foreman	
Journeyman	
Apprentice	
Laborers	
Sub Contractors	
Sub Contractors	
Sub Contractors	
Total	

Discussion with client, subcontractors, owner, designers



# PC-2



- Crawl...  
(birth)

## —Scope

- Setup – Work with CGC to make sure PC-2 exchanged information
  - Forms, Email exchange, documents, security
- Define the “landing screen” or “dashboard” for our specific project
- Understand all of the ‘tabs’ and what each did
- Identify users
- Document a Users/Operations Manual for PM’s to use



## PC-2

- Walk



### – Beta Test

- Train one group on use and functionality
- Refine setup, dashboards, forms
- User Global variables whenever possible



# PC-2



- Run

## — Production

- Roll out the same standards to the next project



# Questions

- Q/A



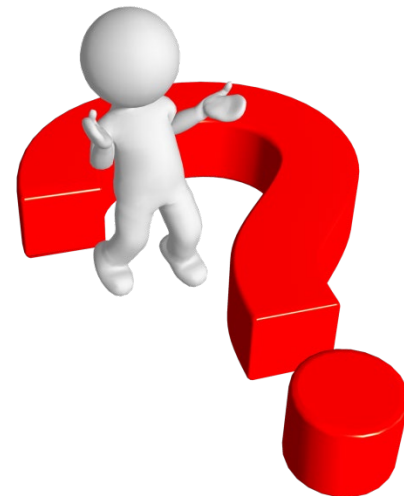
??



Essential Questions



What are they and how do you write one?







# PC-2

LaQuitta and I will be selling  
signed copies of our user  
documentation in the  
lobby!!!

**NO CHECKS...**

**CASH, PayPal or VENMO  
ONLY!!!**

