

**US Army Corps  
of Engineers ®**

# **RESIDENT MANAGEMENT SYSTEM USER MANUAL**

## **Government Manual Vol 1**

**RMS 3.0**

**Version 6.1**

# US Army Corps of Engineers

RMS Center

Kansas City, Kansas, USA

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The data provided herein is current as of patch release 588.

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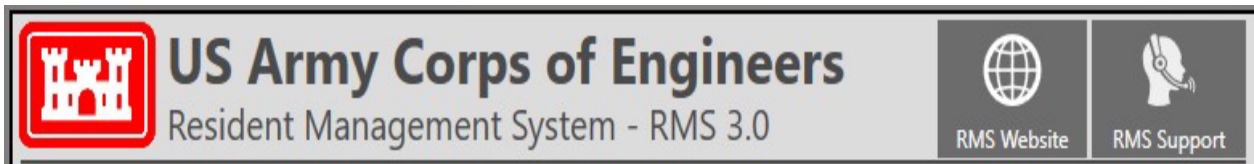
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## 1.0 INTRODUCTION

This User Manual and Training Guide is designed to provide detailed, easy to understand instructions on how to use the RMS 3.0 Government Mode (herein referred to as RMS) program. It assumes that the reader understands any related USACE policy and the construction management business in general.



RMS is a single application incorporating both the Government (GM) and Contractor (CM) modes. Contractor Mode is differentiated from Government Mode using **gold** tiles while Government Mode uses **blue** tiles.

To install RMS/GM see [RMS Launcher](#).

The Resident Management System (RMS) is a user-friendly comprehensive system for the expedient and effective management of construction contracts through tracking and documentation of all facets of a United States Army Corps of Engineers' contract.

This guide is intended to teach users how to use RMS/GM to better manage construction contracts. The chapters follow a common management sequence by beginning with planning and ending with briefing reports. Reading individual chapters will provide an understanding of the functionalities within those areas specifically. However, information integration is a major feature of the RMS system, so to gather a full understanding of the application's capabilities, the suggestion is to read all chapters of this guide. The instructions and standards provided in this guide are current as of patch release 588. For any updates or changes that have been made to RMS, please see the release notes found on the RMS website, [RMS Release Notes](#). Click on the PDF link for the patch to see changes made in that patch.

**URL to Release Notes page.**

**Patch version numbers.**

**Link to Release Notes for specific patch number.**

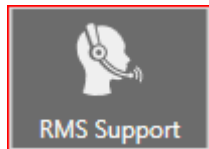
**Release information if no release notes provided.**

Application	Version	Release Date	Document	Supplemental Information
RMS 3.0	Patch 470	03/04/2024		Replace the BCD button, Add CEIT maintenance dates, Prevent frequent reconnection alert, Resolve exception error during letter generation.
RMS 3.0	Patch 466	02/29/2024	<a href="#">PDF</a>	
RMS 3.0	Patch 453	01/04/2024	<a href="#">PDF</a>	

In the opening screen, the provided links will allow quick navigation to RMS Support Websites.



At the top right of the screen, click on [RMS Website](#) button for instructions on obtaining RMS for Government computers. Various user guides, help files, import templates, support tickets and YouTube training videos can be access through the RMS website.



Clicking on the [RMS Support](#) button brings up a window with instructions on how to contact the [RMS Support Desk](#). Clicking on [Open Support Ticket](#) will start the process to send a request for assistance to the RMS Support Desk.

## 2.0 GETTING STARTED

The first step in getting started with RMS is identifying an RMS Administrator to serve the District. This person will be responsible for adding contracts to RMS and managing users' access and assisting users with downloading and installing the application. Follow office procedure for adding and setting up a new contract and users in RMS.

Check the contract specifications for section 01 45 00.15 10 Resident Management System Contractor Mode (RMS/CM), or equivalent. When the contract includes this section, the Contractor must use RMS/CM.

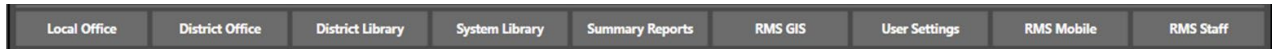
In RMS, most of the information entered into the modules is automatically saved to the server at time of entry. However, there are some modules that do not have information saved until the [Back](#) button is clicked. If users are working in the same module at the same time, and one user clicks the [Back](#) button to save the data, while the other users are still working, the newest data will not appear for the other users until the [Refresh](#) button is clicked. It is very critical to watch for the animation of the circulating [Refresh](#) button for this reason. This indicates new data has been entered and the screen needs to be refreshed to display it. If the [Back](#) button is clicked without refreshing the data first, the data entered may be overwritten by the last user to click the [Back](#) button. Clicking the [Refresh](#) button ensures the most recent and up to date information displays. The latest information is only loaded when users initially open a module, or when the [Refresh](#) button is clicked.

### 2.1 Operational Basics

RMS operates in one of two modes: Library or Contract. Each mode in RMS is further subdivided into modules represented by grey or colored tiles in the respective screens.

**Note:** There are field overlays in some modules. Information on that can be found in [Appendix B](#).

## 2.1.1 Library Mode



The first mode that is encountered after logging in and selecting a District is the Library Mode. When RMS does not have a contract open, it is running in Library Mode. Access information that impacts all contracts is in this mode. Only authorized users can read and/or write to these modules.

**Note:** RMS Mobile functionalities have been discontinued in RMS and will be removed from RMS.

## 2.1.2 Contract Mode



When a contract is opened in RMS, it is in Contract Mode. Most time spent in RMS will be in this mode. Entering and modifying information related to a contract takes place in this mode.

## 2.2 Screen Anatomy

Many of the screens in RMS look very similar. The tiles, buttons, and widgets used throughout RMS perform the same function regardless of where those may be located. Once familiar with how these graphics function in one area, it will be simple to use of RMS in other areas and take advantage of RMS's many functions and features.

### 2.2.1 Screen Header

The screen header shown at the top of most screens provides basic contract identification information (entered by the Government in RMS/GM) and tiles for quickly moving between screens. The image below shows the screen header in the [Contract Menu](#) screen.



Government Mode Home
Contract Selection
Contract Menu

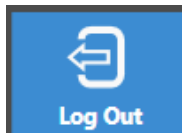
Return to District Selection map/list.  
Return to Contract Selection list.  
Return to Contract Menu screen.



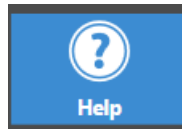
**Back** Saves and Returns to the previous screen. There is no SAVE in RMS; data is stored to the database upon entry. Clicking on **Back** will also save/commit data to the database. **Note:** Exiting RMS without clicking the **Back** button will result in loss of data.



**Refresh** Refreshes data view. On occasion screens may not immediately reflect entered data. When this occurs, click on **Refresh** to update the data showing on the screen. **Note:** If data entered has not been saved the **Refresh** button will result in unsaved updates being lost. When using the **Refresh** button, if newly input data is not displayed, close and reopen RMS.



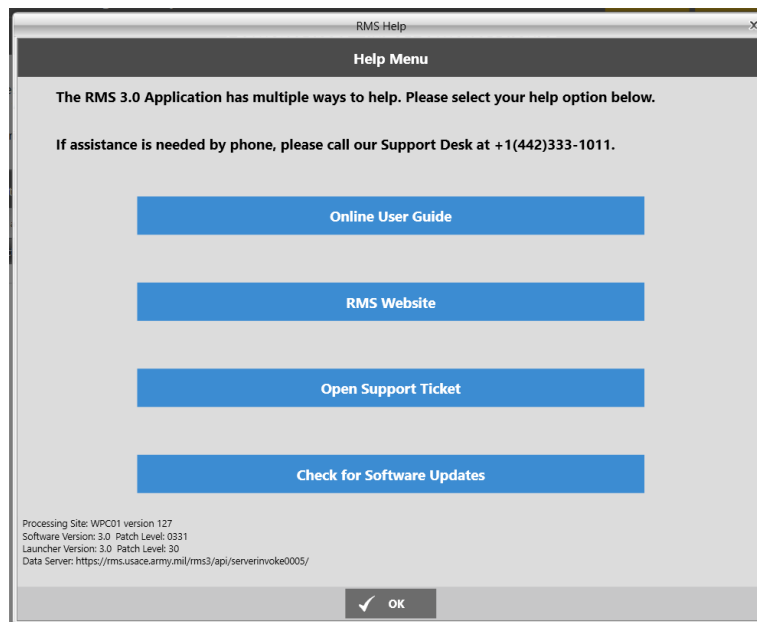
**Log Out** Logs the user out of RMS and returns the user to the Login screen.



**Help** Provides quick access to the RMS Online User Guide, RMS Website and RMS Support Ticket entry.

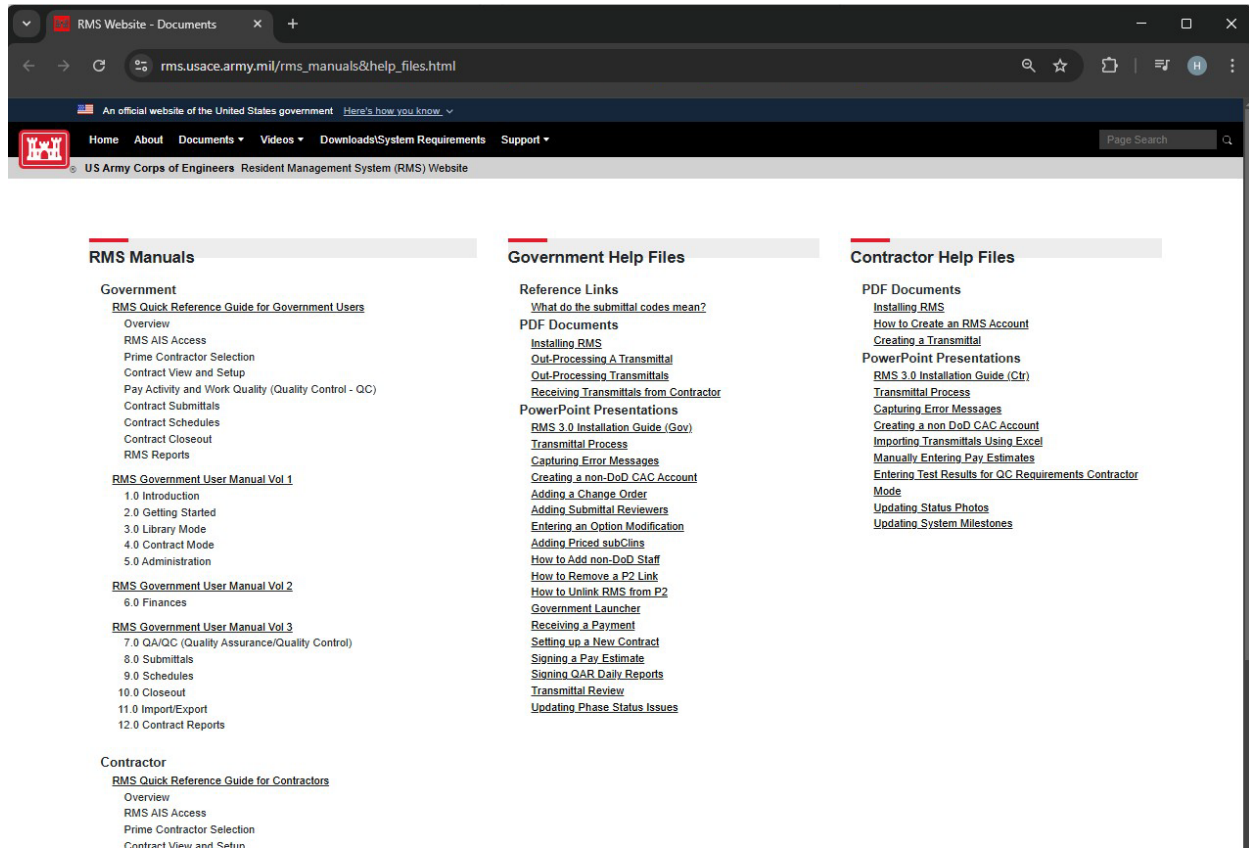
## 2.2.2

### Help Menu

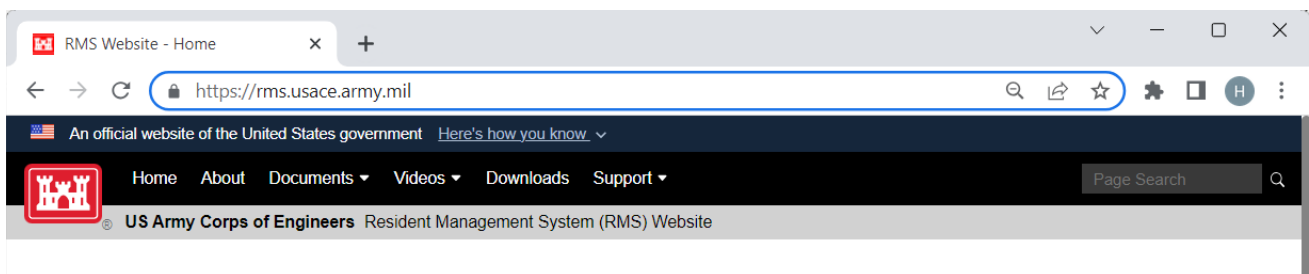


## 2.2.3 Online User Guide

The [Online User Guide](#) button will take users to the Manuals and Help Files page on the RMS website. This is where users can find the latest user manuals or Quick Reference Guides and links to various help files that contain supplemental training for both Government and Contractor.



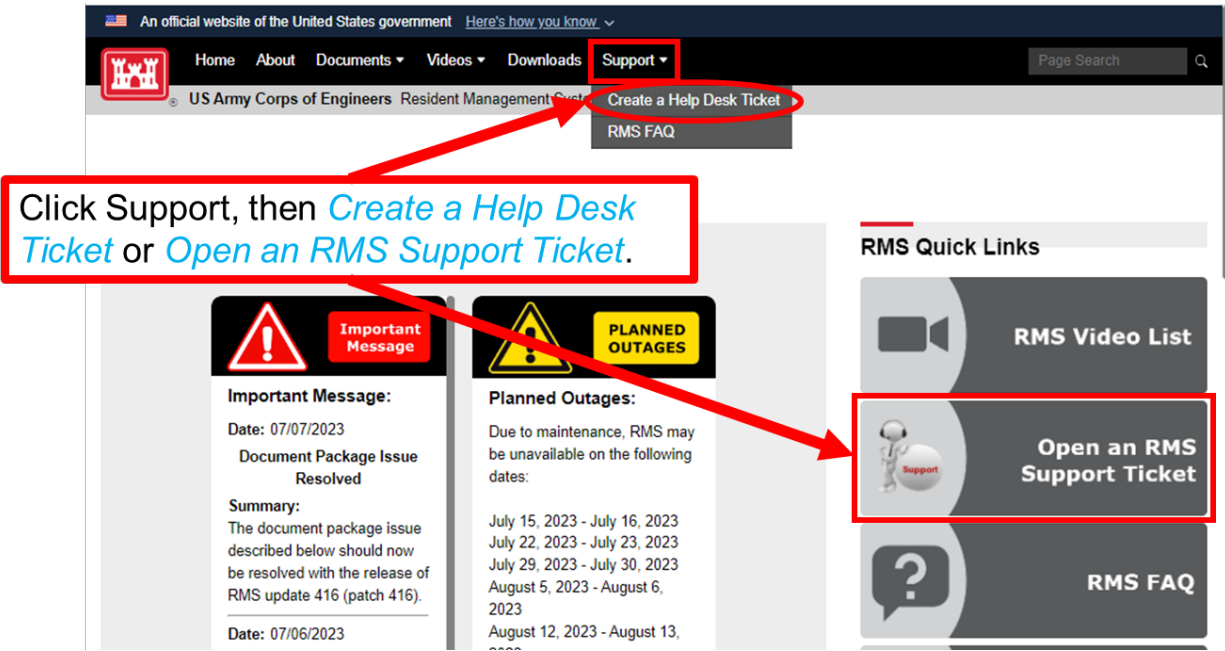
## 2.2.4 RMS Website



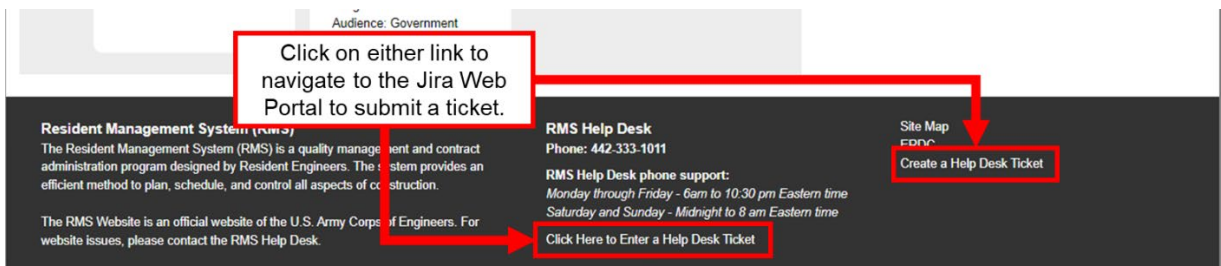
To navigate to the RMS Website, type <https://rms.usace.army.mil> into the address bar of a web browser, like Google Chrome, Microsoft Edge or Explorer, Mozilla Firefox, etc. The website is where users can download the RMS software, check for updates to the system, or for general information regarding RMS.



Another way to access the web portal is from the RMS Support Center Webpage (<https://rms.usace.army.mil/>), where there are multiple places to link to submit a ticket. Click on the Support drop-down at the top of the page to reach [Create a Help Desk Ticket](#) or click on the [Open an RMS Support Ticket](#) button.



Links are available at the bottom of the page, as well:



All of these options will open up a webpage to the Jira Web Portal. Conversely, users may also call the RMS Support Center and have a support technician create the ticket by calling +1 (442) 333-1011. This line is open Monday through Friday from 6am Eastern until 10pm Eastern and overnight Saturday and Sunday from Midnight Eastern to 8am Eastern time except on Government-observed holidays.

### 2.2.5.1 Log into Jira

When the user first opens the Jira Web Portal (<https://astraferms.atlassian.net/servicedesk/>), the user must log in to submit or view tickets for RMS.

**Note:** The username and password for the Jira Web Portal are not the same as the user's RMS username and password (if user is a non-CAC login user). This username and password must be set by the user either through the Jira Web Portal or by calling in a ticket with the Support Center. (The Support Center does not create or set a password for this account, only the email address. Please see the section on [changing/setting the Jira account password](#) for how to set the password if a support technician creates the account for the user).

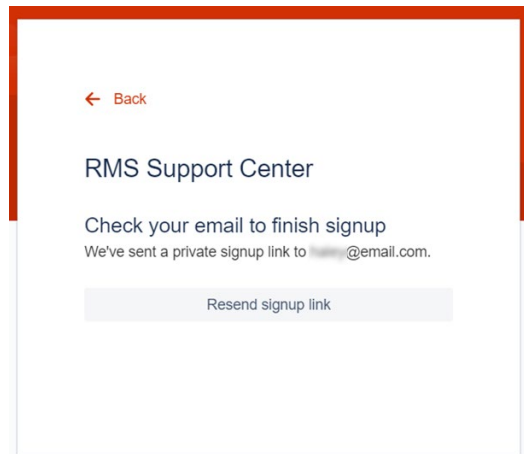
If the user has never logged into Jira before but has submitted a support ticket through RMS or had a ticket created by the RMS Support Staff after July 2021, then the user will simply need to enter the email address used for tickets in RMS and create/change the Account Password (sent to the user's email address) to proceed with logging in.

### 2.2.5.2 Create a Jira Account

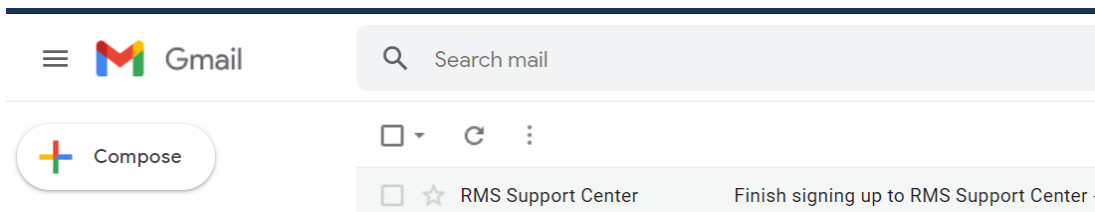
If the user has never submitted a ticket through RMS or had one submitted by an RMS Support Staff after July 2021, then the user will need to create a new account in the Jira Web Portal.

When opening Jira for the first time, enter the email address to receive communications about RMS Support tickets and click the **Next** button. Then, proceed by clicking **Sign up with password** in the following screen.

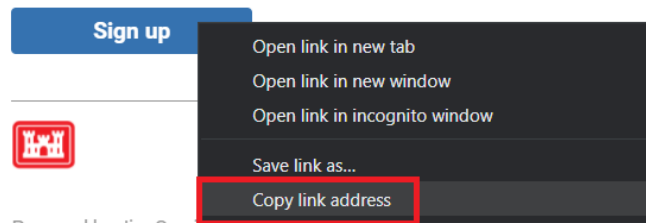
The diagram illustrates the user flow for creating a Jira account. It starts with a screen titled "Enter your email to log in or sign up". This screen contains an "Email address" input field and a red "Next" button. A red arrow points from the "Next" button to the second screen, "RMS Support Center". This second screen features a "Back" link, the title "RMS Support Center", the instruction "Sign up to continue", an "Email address" input field with a placeholder "@email.com", and a red "Sign up with password" button. The "RMS Support Center" screen is highlighted with a red border.



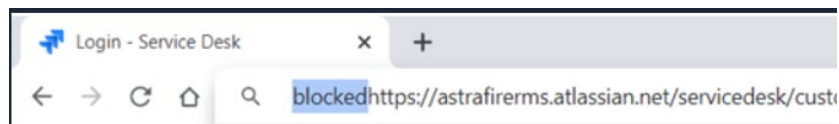
Next, check the email for a link to finish signing up, it will look similar to the following:



Open the email and right-click on the [Sign up](#) link, then choose [Copy link address](#) as shown on the image on the right.



After that, open Google Chrome (or other supported web browser, not IE) and paste it into the address bar. Once in the web browser, users will need to remove/delete the word 'blocked' from the beginning of the link and then press enter to load the page.



Next, enter the user's name as it is to appear in Jira and enter/create a password. Last click [Sign up](#) to finish the process.

Sign up

Email address  
User's email will show here

Full name  
Enter name

Choose a password  
Create password

By clicking *Sign up*, you agree to the [Privacy Policy](#) and this [Notice and Disclaimer](#).

Sign up

Click on [Sign Up](#) to finish the process.

Next, proceed to [Submit a Support Ticket](#).

### 2.2.5.3 Change Jira Account Password

To change the password for a Jira account, enter the user's email in the [Email address](#) textbox on the login screen and click Next (seen below, left).

Enter your email to log in or sign up

Email address

Next

Log in to RMS Support Center

User email displayed here

Password

Log in

Forgot your password?

Need an account? [Sign up](#)

Click on [Forgot your password](#) to set/change the account password.

On

the following screen, click on the [Forgot your password](#) link. This will send an email to the email entered on the previous screen (seen above, right).

Navigate to the email account to find an email from RMS Support Center with the subject "Reset your password" as shown below.

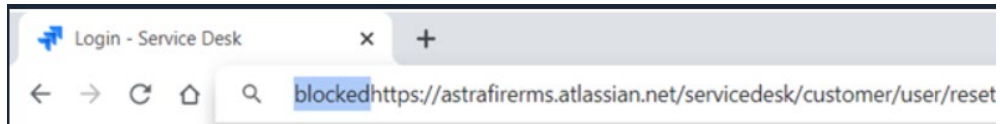
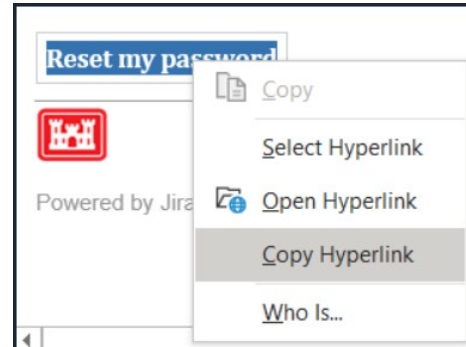
RMS Support Center

Reset your password - Hi, You requested a new password for

Since USACE blocks all links in emails, users will need to right click on the box in the email that says "Reset my password" from Outlook and then click on [Copy Hyperlink](#) in order to get to the Jira Web Portal page to change the account password.

**Note:** The button with the link in the image above will not show up in the web version of Outlook. If the option to “Show blocked content” is available in the email on the web, using it may make the button appear. Otherwise, please ensure that the computer desktop version of the Outlook application is being used for receiving communication from Jira.

Then open Google Chrome (or other supported web browser, not IE) and paste it into the address bar. Once in Chrome, users will need to remove/delete the word “blocked” from the beginning of the link.



Then press Enter to continue to the page to change the Account Password.

**Create new password**

Email

**User email will show here**

Password

**Confirm**

#### 2.2.5.4 Submit a Support Ticket

Once the Jira Web Portal has opened in the user’s web browser, if the user has not logged into Jira in the past, please follow the instructions for [logging in to Jira](#). Otherwise, the following screen will display:

The screenshot shows the RMS Support Center interface. At the top right, there is a 'Requests' button with a user icon. A callout box points to it with the text: 'Click here to view all open tickets.' Another callout box points to the user icon with the text: 'Click here to view account information and log out.' Below the header is a search bar with the placeholder text 'Find help and services'. A section titled 'CE-IT Maintenance Schedule, all times are in central time' contains several lines of text about scheduled weekend maintenance. A callout box points to this section with the text: 'Notifications will display here in peach.' Below this is a navigation bar with the text 'Welcome to the RMS Support Center to create a support ticket click on the option down below "RMS Support Ticket"'. Underneath, there is a section 'What can we help you with?' with a button labeled 'RMS Support Ticket'. A callout box points to this button with the text: 'Click here to open a new support ticket.'

**Note:** Jira Web Portal is not supported on Internet Explorer, please use Google Chrome, Microsoft Edge, Mozilla Firefox, or another supported web browser to access Jira.

Once on the Jira Web Portal, to submit a ticket, click on the RMS Support Ticket link:



RMS Support Ticket

Fill out all requested information in the form.

Raise this request on behalf of\*

Logged in User's name will display here.

Summary\*

Enter a brief description of the issue in the Summary box.

Contract ID

If the issue is related to a contract, enter the Contract ID here. The Contract ID can be found in RMS in the [ ] in the upper left corner of the screen.

Phone Number

Districts\*

Choose the District from the drop-down list. This information is required for any ticket.

Attachment

Drag and drop files, paste screenshots, or browse

Browse

Use the Browse button to add any attachments to the ticket.

Remember: Please do not upload any PII or CUI when entering tickets

Description

Enter a detailed description of the issue or question for which this ticket is being created. Add any details, steps taken prior to error message appearing, or description of the error message in question. The more information provided, the faster the RMS Support Center can provide an answer.

Software Application

Enter the RMS version being run by the User. 3.0 Gov or Contractor Mode.

Send

When all information is entered, click on Send to submit the ticket.

The more information entered, the faster the issue can be resolved.

### 2.2.5.5 Viewing Support Tickets

To view tickets submitted, click on the Requests button in the top right corner of the web portal. There are two options available,

1. [Created by me](#) which shows tickets submitted by the logged in user or
2. [All](#), which shows tickets created by the logged in user and tickets for which the logged in user is a requested participant. A requested participant is a user that has been added to the ticket either by the RMS Support Staff or the user that initiated the ticket.

## 2.2.6 Table Customization

Table views are provided to assist with data review. These table views are easily customized using the drag-and-drop technique. Views can be customized using several different methods:

- Clicking and dragging the column header to the desired position in the table to view data in a desired configuration.
- Dragging the column header into the grey row above the table to group data according to column values in the table.
- Clicking on the funnel widget in the column header and selecting the desired data filters from the drop-down selection box to filter the data displayed.
- Clicking on a column header to order the data according to the column's values.

**Note:** Table customization is not saved when the module is exited. Columns that are rearranged to view data is temporary and is not saved to a user profile. The user will need to customize tables each time when entering a screen.

Drag a column header and drop it here to group by that column

Contract/Delivery Order No.	Contract ID	Full Title of Contract	Office Name	Contract Stage
[E1002760]	E1002760	PAN22P0524 Backflow Preventers Ph3 -Test	T2 Baltimore Test District	Future
L1006033-TEST	E1002759	PAN22P0524 Backflow Preventers Ph3 -Test	T2 Baltimore Test District	Future
W911KB21C0030	E1002758	Ticket Service-62289 Test contract	T2 Baltimore Test District	Active
[E1002757]	E1002757	SDEF test service-62205	T2 Baltimore Test District	Active
[E1002756]	E1002756	RMSDEV-512 Non-CAC RFI completion test	T2 Baltimore Test District	Active
W912PL20D0065 W912PL20F0165	E1002755	testing dup pay activities service-61976	Jenn's Training Office	Active

Drag the column header to change column order

Drag and drop column headers here to group

Click the funnel to filter by values

Click to change order by values


When dragging column headers, notice that the *Contract ID* column is now the first column instead of the second column:

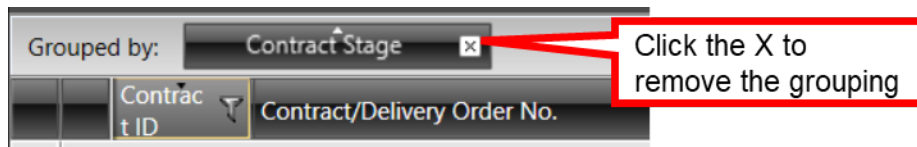
Drag a column header and drop it here to group by that column

Contract ID	Contract/Delivery Order No.	Full Title of Contract	Office Name	Contract Stage
E1002760	[E1002760]	PAN22P0524 Backflow Preventers Ph3 -Test	T2 Baltimore Test District	Future
E1002759	L1006033-TEST	PAN22P0524 Backflow Preventers Ph3 -Test	T2 Baltimore Test District	Future
E1002758	W911KB21C0030	Ticket Service-62289 Test contract	T2 Baltimore Test District	Active
E1002757	[E1002757]	SDEF test service-62205	T2 Baltimore Test District	Active
E1002756	[E1002756]	RMSDEV-512 Non-CAC RFI completion test	T2 Baltimore Test District	Active
E1002755	W912PL20D0065 W912PL20F0165	testing dup pay activities service-61976	Jenn's Training Office	Active

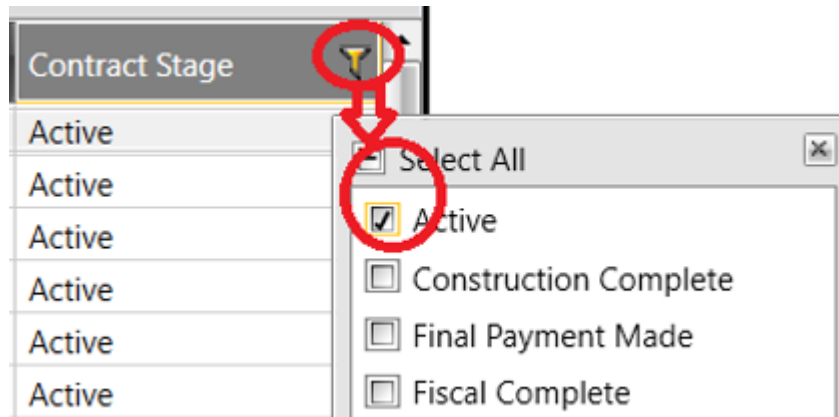
## Grouping Column Headers:

Contract ID	Contract/Delivery Order No.	Full Title of Contract	Office Name	Contract Stage
▼ Active				
▼ Construction Complete				
▼ Final Payment Made				
▲ Fiscal Complete				
E1002607	[E1002607]	Fiscal Complete Project	NWO Project Office under Area A	Fiscal Complete
E1002577	W912DQ16D3001 W912DQ19F3041	Owen's Contract	Owen's Test Office	Fiscal Complete
E1001779	W912DR-10-D-0004 0036	B11 (2000 gal) & B8 (6000 gal) UST Remov	EMDC Engineering	Fiscal Complete

When grouping is used, to view contracts in each group, click on the down arrow  for the group to be viewed. To remove the grouping, click on the column header in the grouping row and then click the **X** button.

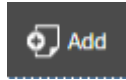


## Filtering Columns:

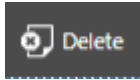


Use the filter button to filter the values shown in the column. In the example above, the column is being filtered to only show results in the [Active](#) Contract Stage.

## 2.2.7 Widgets Explained



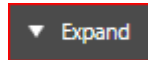
Add/create a new item.



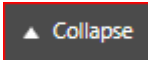
Delete/remove an existing item. Depending on the item, in addition to single deletions, there may also be options to delete more than one item at a time or all items in one step.



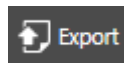
Edit/revise/modify an existing item.



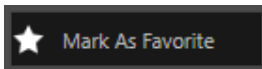
Expand the associated list of items.



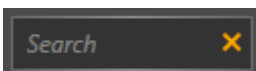
Collapse the associated list of item(s).



Export the table to an Excel file or an RMS report for external use.



Identifying a contract as a Favorite will display it in the Favorites list on the Contract Selection screen



Enter any part of the word(s) for which to search. Search will look at all columns on the screen. Search is case-sensitive. Click on the X to clear the search criteria.



Use this widget to open the selected item. Double-clicking on the item performs the same action.



This widget identifies an unformatted memo field. Type directly in the adjacent box or click on this widget to open a larger box in which text can be entered. There is no limit to the number of characters that can be entered.



When a date is required, click on this widget to open a calendar from which to select the date.



Use the funnel widget to filter/limit the data displayed in the table. The selections will vary depending on the data contained in that column. There is also the capability to build a simple logic filter to further refine the data displayed.



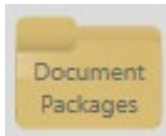
Clicking on a box containing this graphic will open a list displaying the items corresponding to the selected box.

A rectangular button with a light gray background and a thin red border, containing the text 'OK' in black.

Accepts the selected entry. Double-clicking on the entry performs the same action

A rectangular button with a light gray background and a thin red border, containing the text 'Cancel' in black.

voids the selected entry/action.



Document Packages are used extensively throughout RMS to facilitate the inclusion of supporting documents. See section on [Document Packages](#) for detailed instructions on its use.

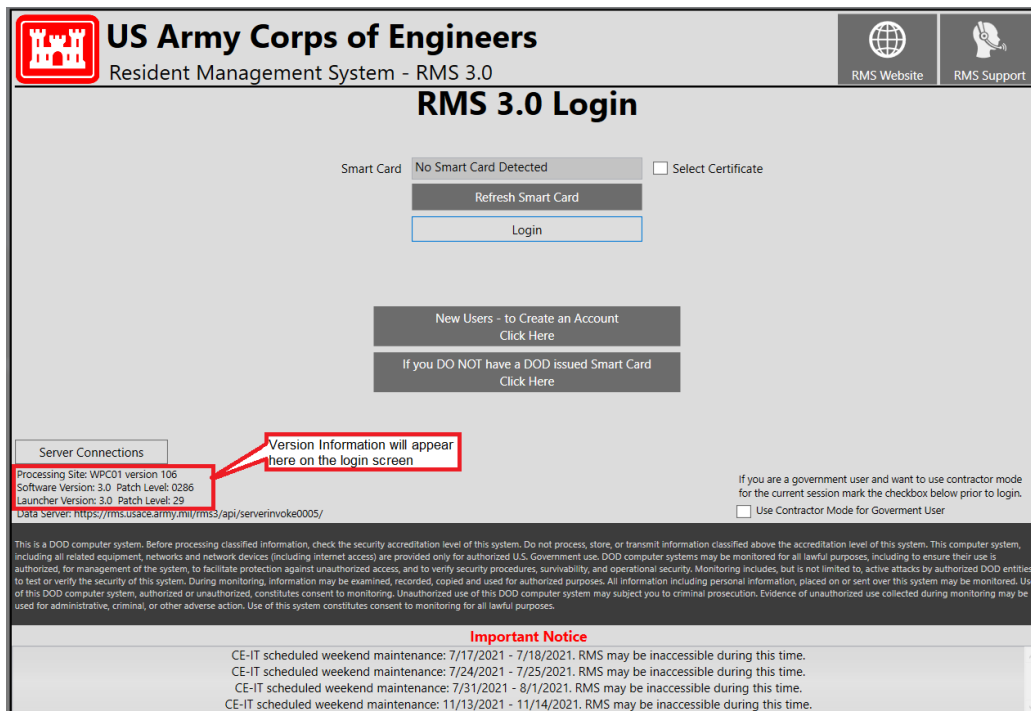
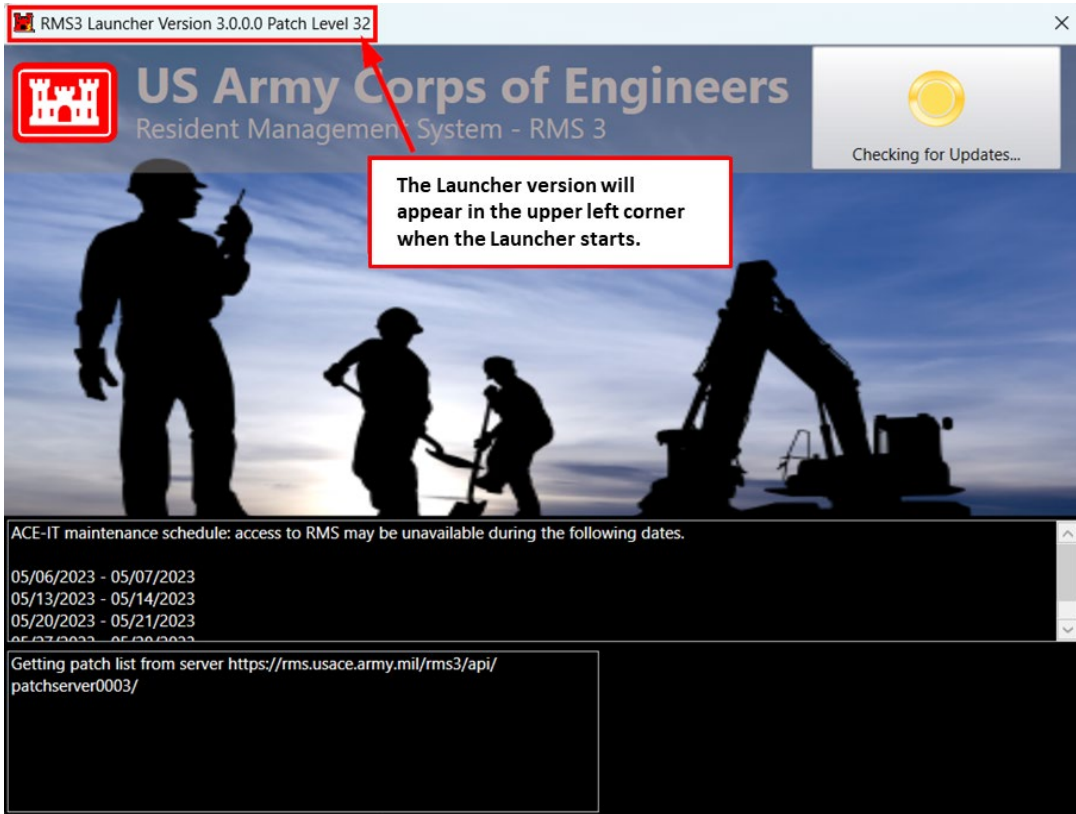
## 2.3 RMS Launcher

### 2.3.1 What is RMS Launcher?

The RMS Launcher is used to install RMS, and it is the first program that runs when the RMS desktop icon is clicked. The Launcher checks the RMS servers for the latest update and automatically updates the software to the latest patch. Make sure RMS is running the latest Launcher. If not, it will need to be updated to ensure the software updates are automatically installed. If the RMS Launcher is not periodically opened, then some updates may be missed, causing users to be unable to log into RMS. As such, it is recommended that users make sure to close out of RMS at the end of the day. This will assist in assuring that it is opened the next day, to allow RMS to check for updates. If RMS is not used daily, it is important to make sure that the launcher runs at least once a week to check for any updates that may have occurred.

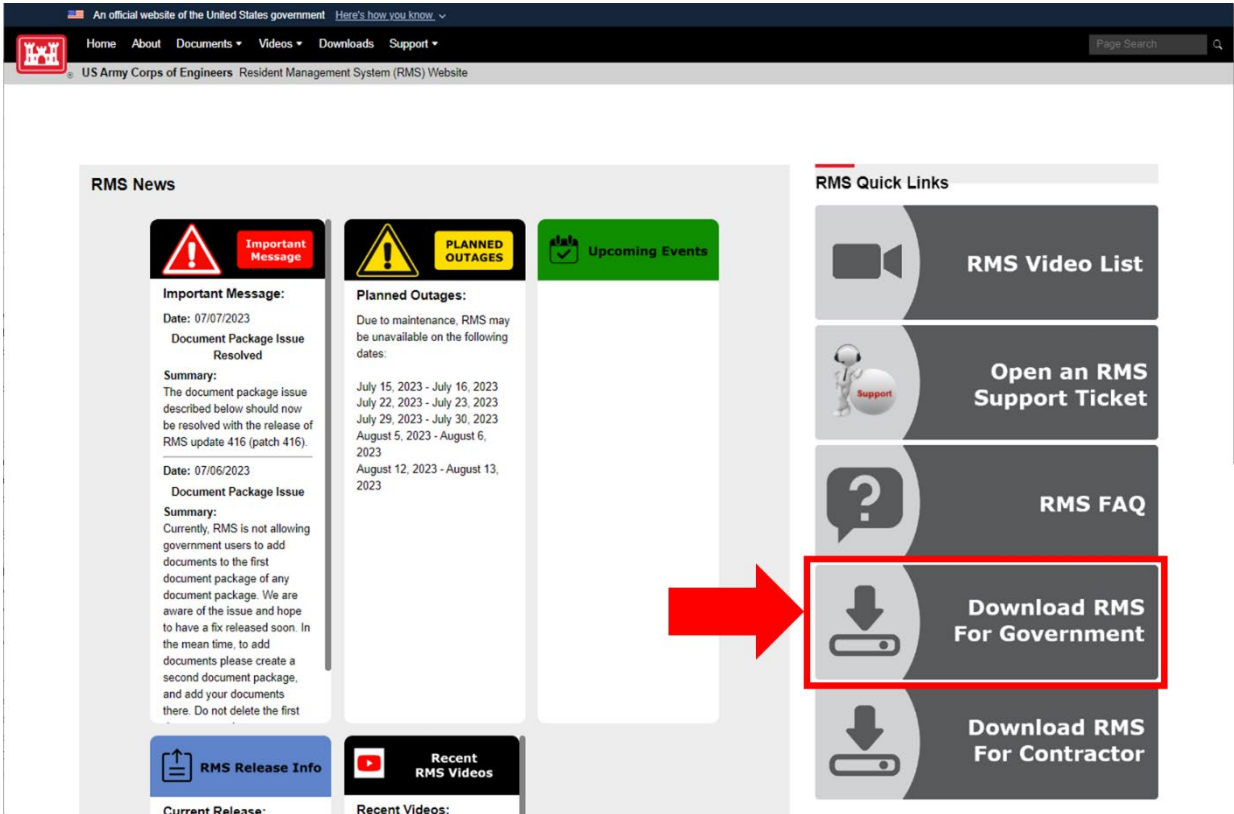
## 2.3.2 Which Launcher Version is Installed

There are two places where the Launcher version can be checked. See screenshot below for where to check the Launcher version number. If either of the options are not as shown below, the Launcher will need to be updated.

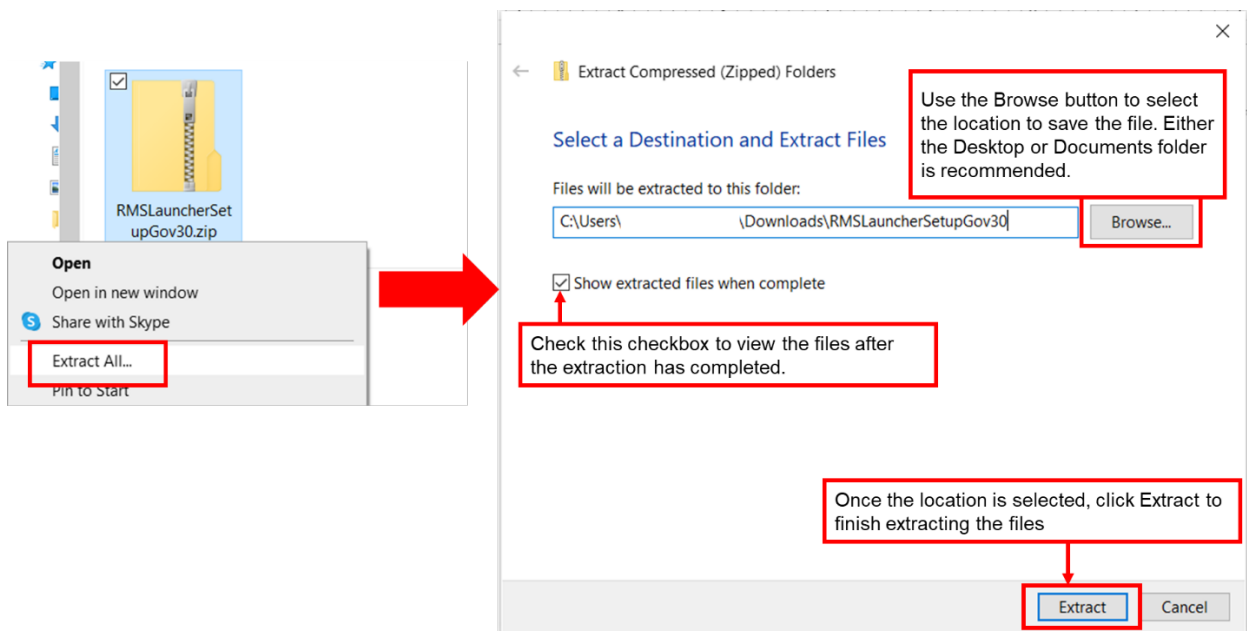


### 2.3.3 Update the Launcher

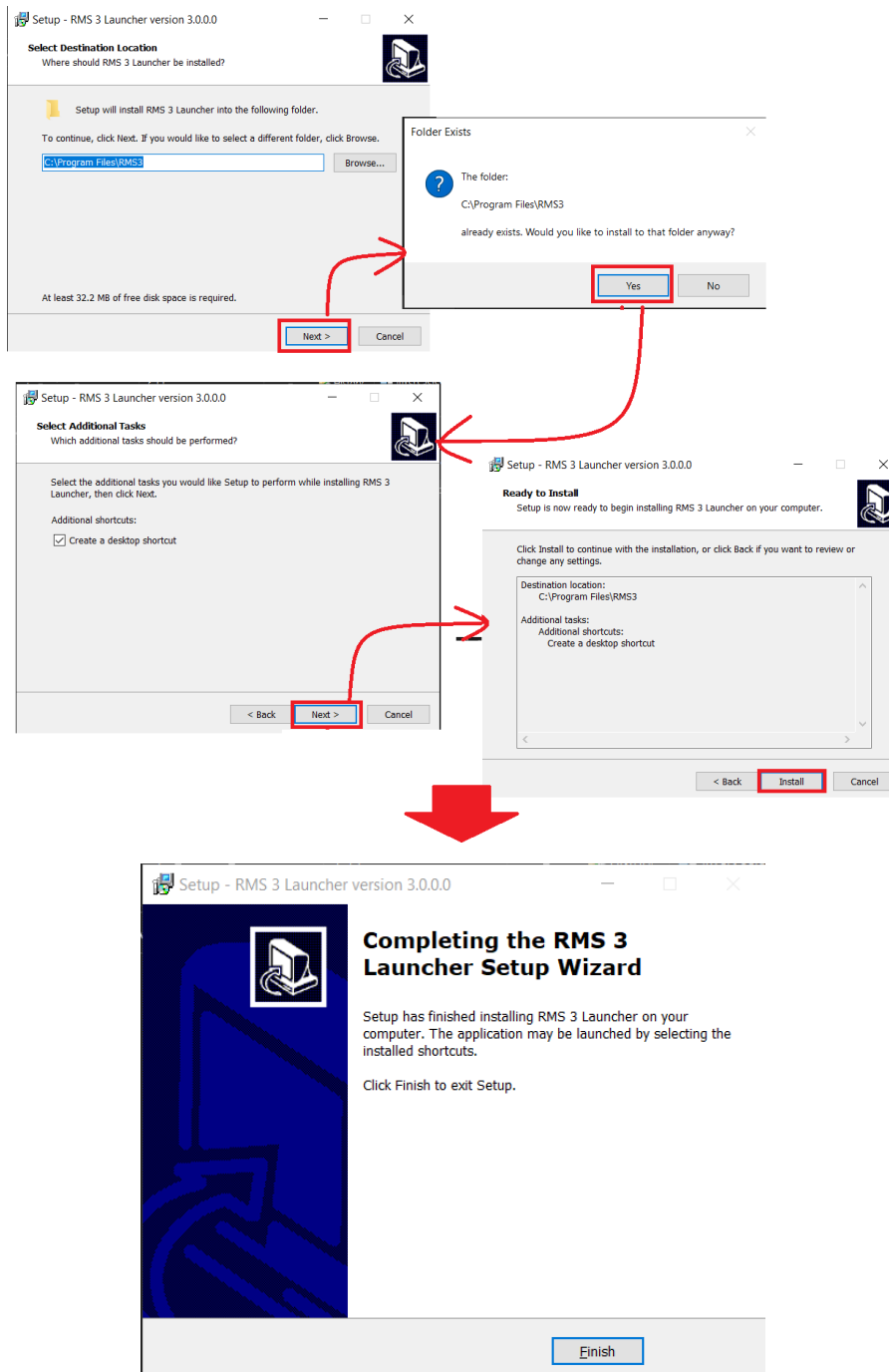
To update the RMS Launcher, go to the [RMS Website](#) and download the Government Launcher by clicking on [Download RMS For Government](#).



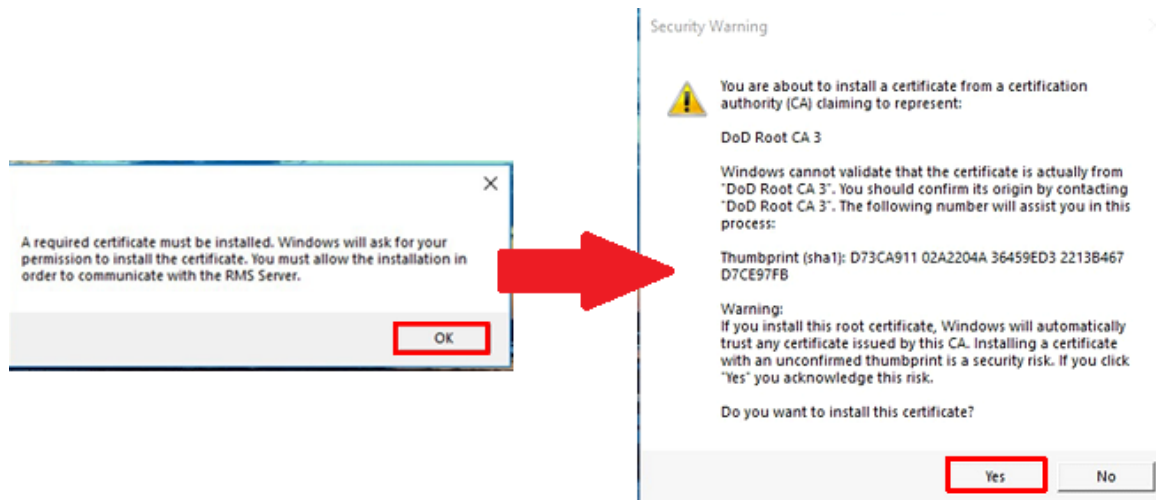
After downloading the file, it will need to be extracted to the computer to be run. Navigate to where the file was saved, and right-click on it. Then, choose [Extract All](#). Select the location to save the file and then click on [Extract](#).



Navigate to the extracted folder and run the RMSLauncherSetupGov30.exe file, accepting all the defaults, and then click finish.



Once complete, run the RMS Launcher. Sometimes, the DoD certs need to be reinstalled. If so, users will be prompted for the following:



### 2.3.4 Installing RMS GOV for the First Time

For Government users installing RMS for the first time, the user must do so from the App-Portal, as this process will set up the necessary permissions on the user's computer to correctly use and update RMS. These include providing the proper permissions to read/write/modify files in the RMS3 file folder, which is necessary for RMS updates to be received.

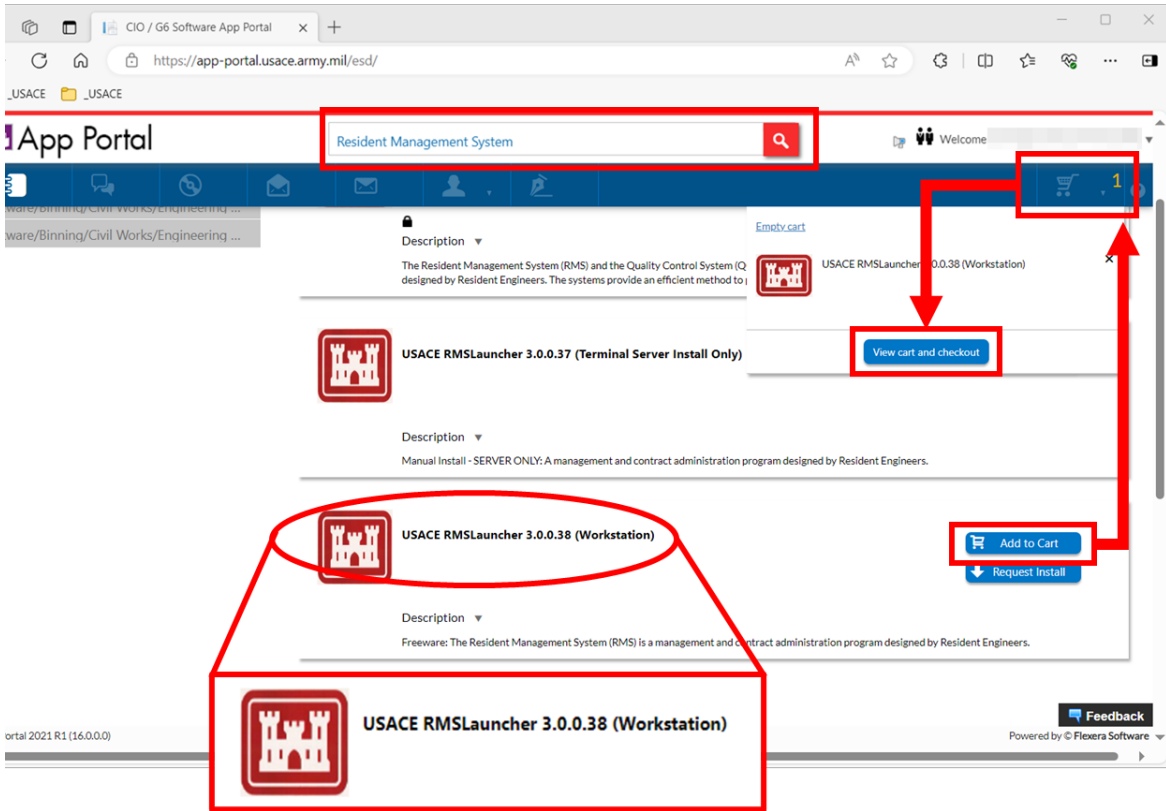
Users will not have permissions to install the .exe from the RMS Website, unless the RMS3 folder has already been setup correctly on the user's computer. Follow the steps below to request the RMS Launcher installation on a Government-owned computer.

1. Go to: [CIO / G6 Software App Portal \(army.mil\)](http://CIO / G6 Software App Portal (army.mil)).
2. Perform a search for "Resident Management System".
3. Choose the RMS Launcher result that reflects the most recent (highest) launcher version number.

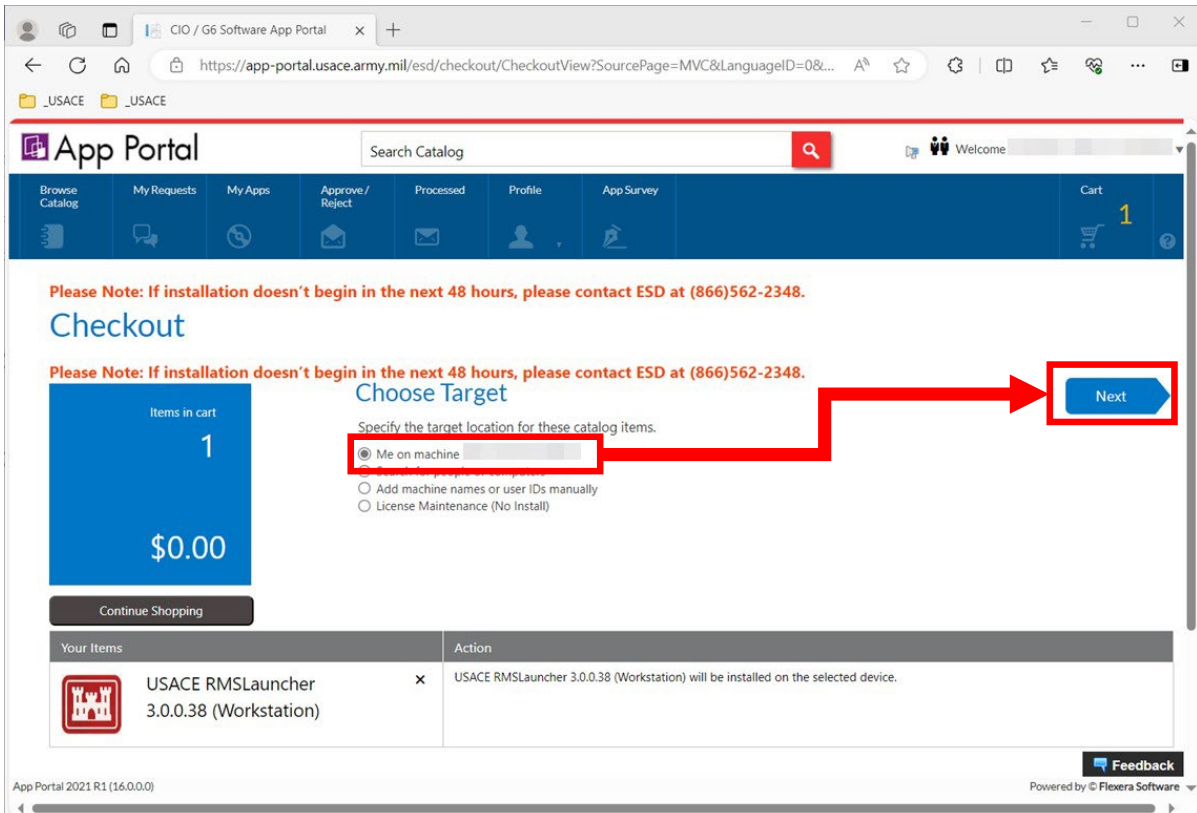
**Note:** The most recent launcher version number at the time of writing this guidance is currently 3.0.0.38. If the launcher number has been updated before the guidance in this manual has been updated, select the result that reflects the largest version number (i.e., higher than 38).

4. Click [Add to Cart](#).

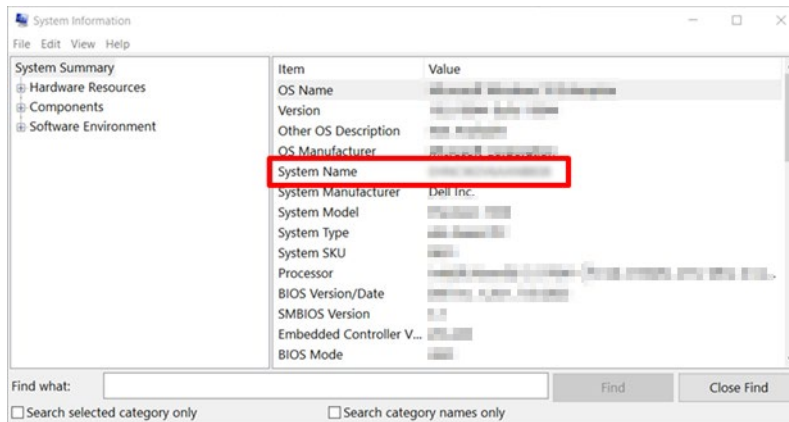
5. Click on *Cart*, then *View cart and checkout*.



6. Choose the *Me on Machine* \*\*\*-\*\*\*\*-\*\*\*\* target under the Choose Target section.



- a. To check the machine name, go to the **System Information** application on the machine and verify with the **System Name**.



7. Click **Next**.
8. Click **Submit** to submit the request.
- a. Approval is not required for installation.

**App Portal** Search Catalog Welcome

**Please Note: If installation doesn't begin in the next 48 hours, please contact ESD at (866)562-2348.**

## Checkout

**Please Note: If installation doesn't begin in the next 48 hours, please contact ESD at (866)562-2348.**

Items in cart: 1

**Submit Request**

Click Submit to submit this request.

Summary

Machine: [Redacted]

User: [Redacted]

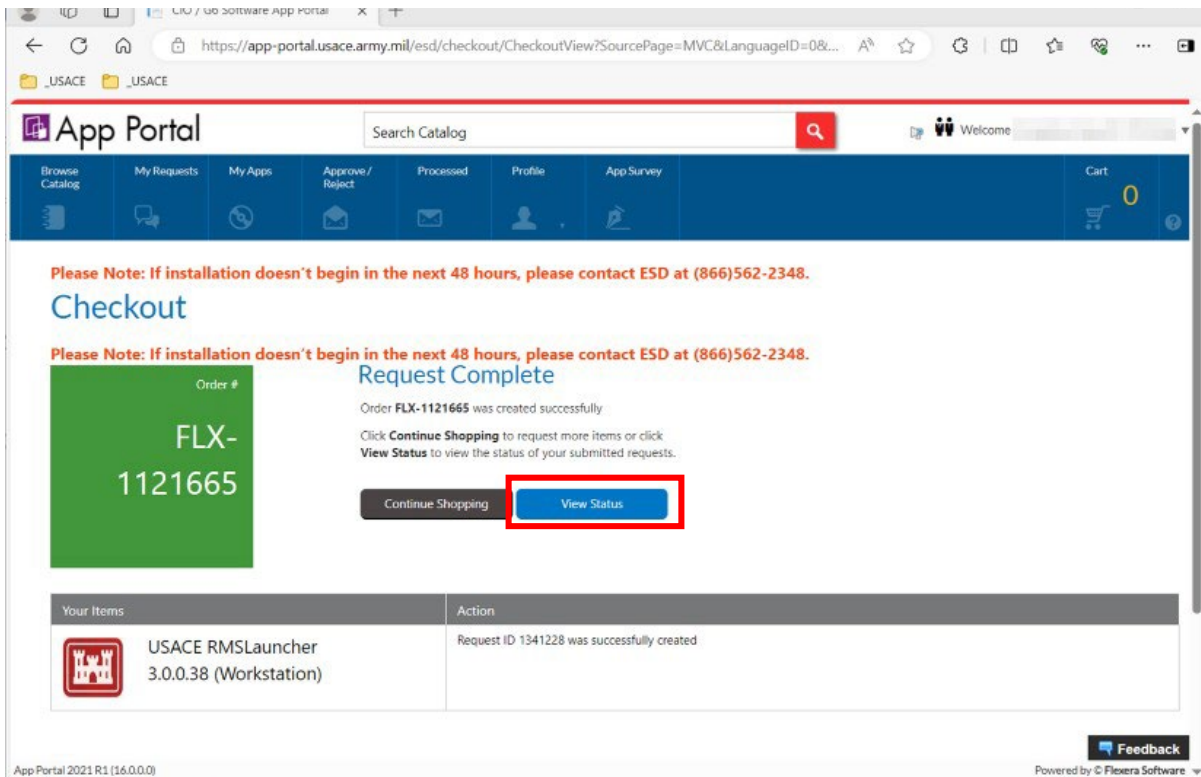
Continue Shopping

Your Items	Action
USACE RMSLauncher 3.0.0.38 (Workstation)	No approval needed.

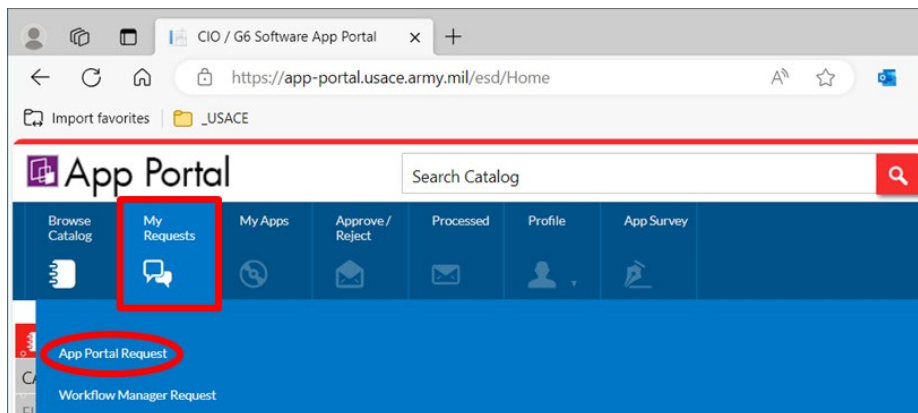
Feedback

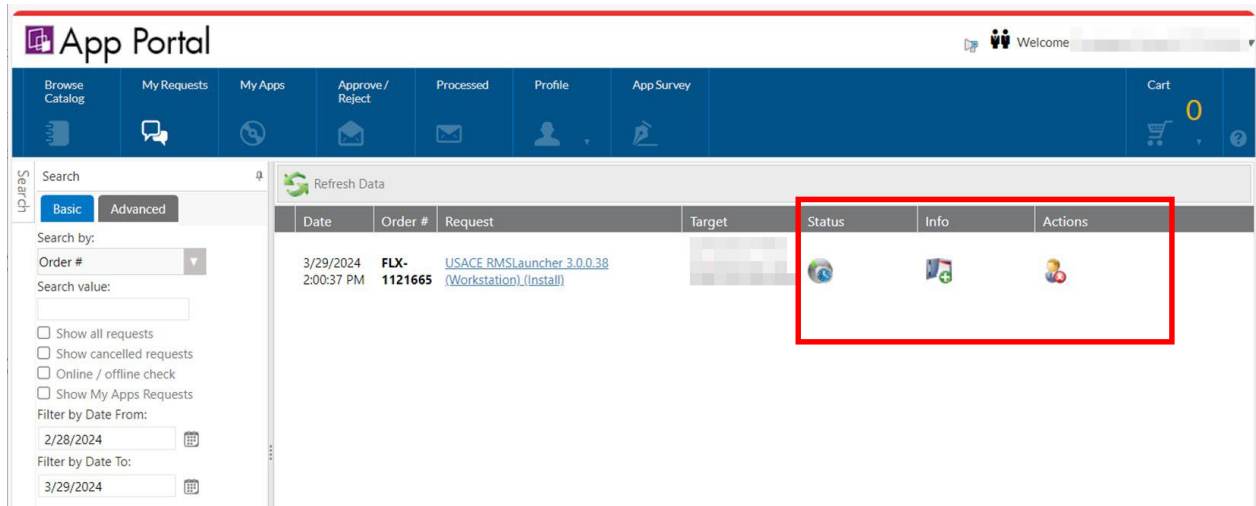
App Portal 2021 R1 (16.0.0.0) Powered by © Flexera Software

Once the request has been completed, click on [View Status](#) to check the status of the installation.



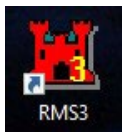
The status of the request can also be accessed by clicking on the [My Requests](#) button, or by hovering over the button and clicking on [App Portal Request](#).



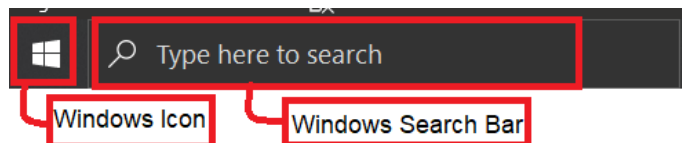


**Note:** This installation may take up to 24 hours to install. The computer that is to receive this installation needs to remain connected to the VPN or directly attached to the Government network until confirmation is received that installation has been completed.

### 2.3.5 Opening RMS for the First Time



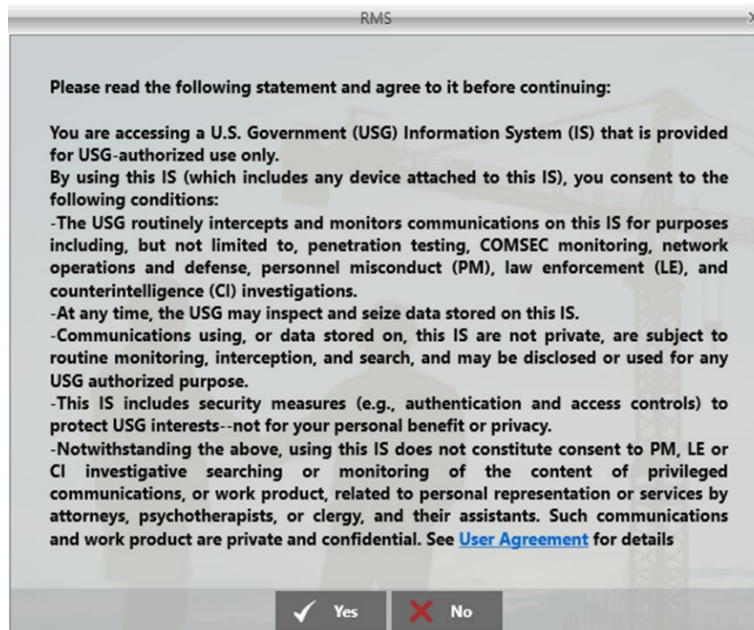
Look for the RMS3 icon on the desktop and double-click on it. If the RMS shortcut did not get placed on the desktop, then search for "RMS Launcher" using the Windows Search bar located on the task bar or start typing it in after clicking on the Windows icon.



This will complete the installation of RMS. If prompted with certificate or security warnings, click **OK** or **Yes** to allow the installation to continue.

## 2.3.6 Getting into GOV Mode for RMS

Upon opening RMS, users will be required to acknowledge the DoD Consent Banner as shown below.



**Step 1.** New RMS users will need to contact the RMS District Administrator for the District the user needs to access. Provide the District's RMS District Administrator with the user's email and DoD ID Number (found on the back of the user's CAC) to get an RMS Staff Record added to the District. Users will not be able to log into the District until this step is completed.

**Note:** For non-CAC users: Provide the RMS Administrator with the preferred email that will be used to log into the account. Until a staff record is created, non-CAC login users will not be able to login as a Government user. Instead, the user will only see Contractor Mode of RMS.

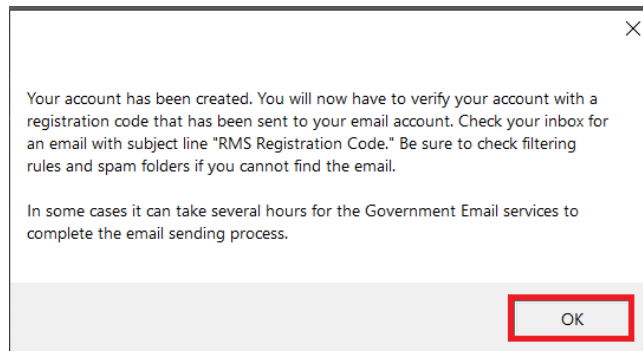
**RMS Administrators:** See Section 3.9 [RMS Staff](#) for how to add a new RMS user to the District Staff.

**Step 2.** Create a non-CAC account login and password.

**Note:** Only non-CAC login users need to follow this step.

Once the user has created his account login and password, the new users will be able to run RMS on any computer on which RMS has been installed.

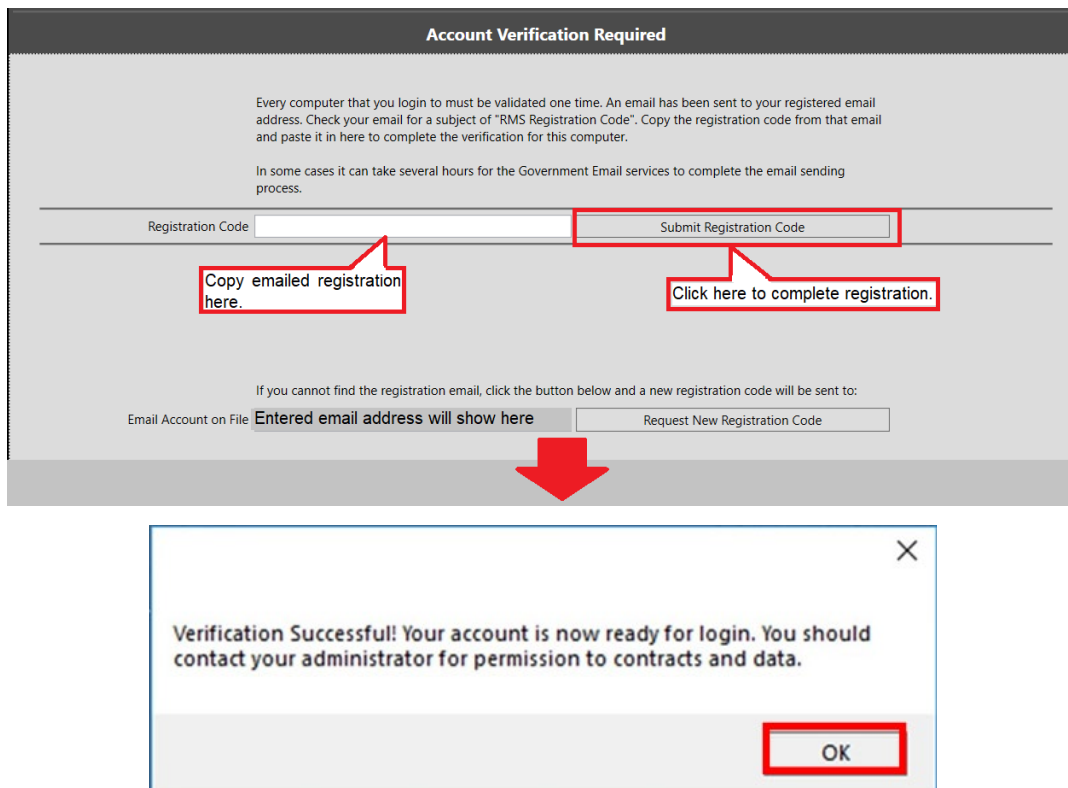
**Note:** Make sure the email address that is used to create an RMS account matches what the RMS Administrator was provided.



**Step 3.** Verify newly created non-CAC account.

**Note:** Only non-CAC login users need to follow this step.

Copy the Registration Code sent to the registered email, then click on [Submit Registration Code](#).



**Step 4.** Verify the account has been connected.

For CAC users: If a user's District RMS staff record has already been created by the RMS Administrator, the District(s) listed in the staff record can be accessed by the user.

There are three ways to access the District and Project after logging into RMS:

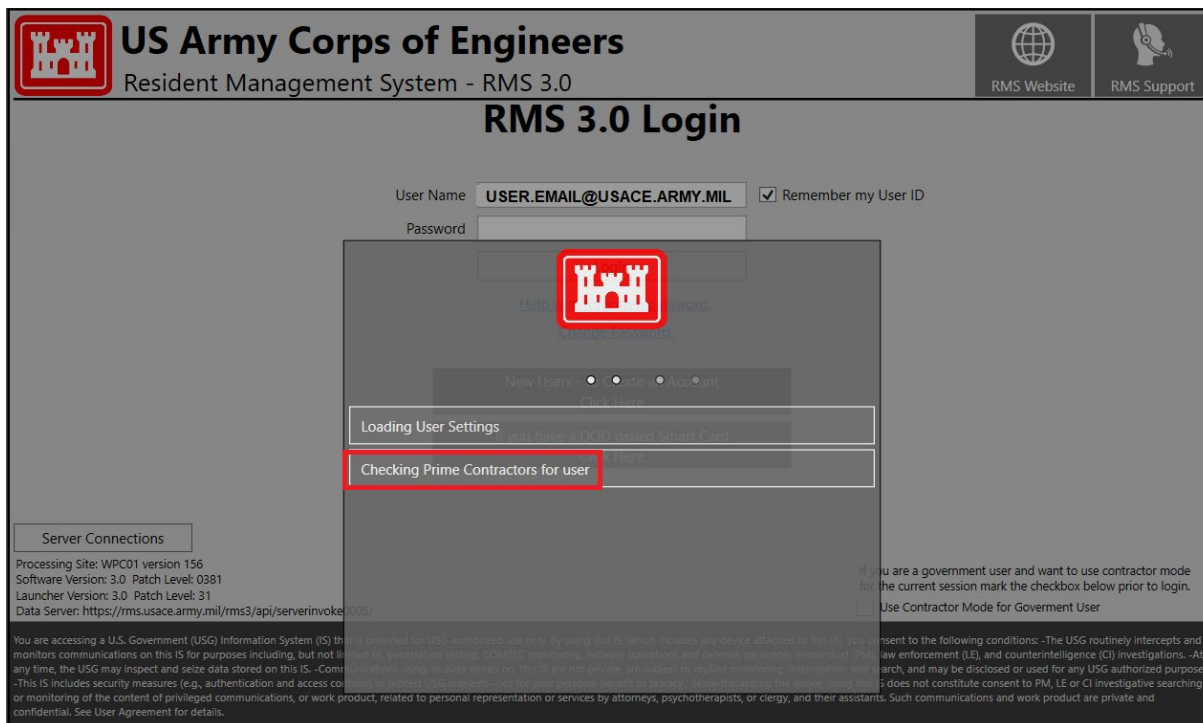
- The first is to click on the City Name of the District.
- The second way is to select the City Name from the list found in the top-right of the map in the [Recently Used](#) section. This area will be blank before visiting a District for the first time.

- The third way the City Name can be selected is by using the USACE Division list. When a division is selected, the list below *USACE Divisions* will generate the list of cities within that division. Select the City Name from the list generated by selecting the USACE Division.

For non-CAC users: If the RMS Administrator has NOT yet created a user's District RMS staff record to log into Government Mode, the RMS System will assume the user is a Prime Contractor and show the Contractor Mode Prime Contractor Selection view as seen below.

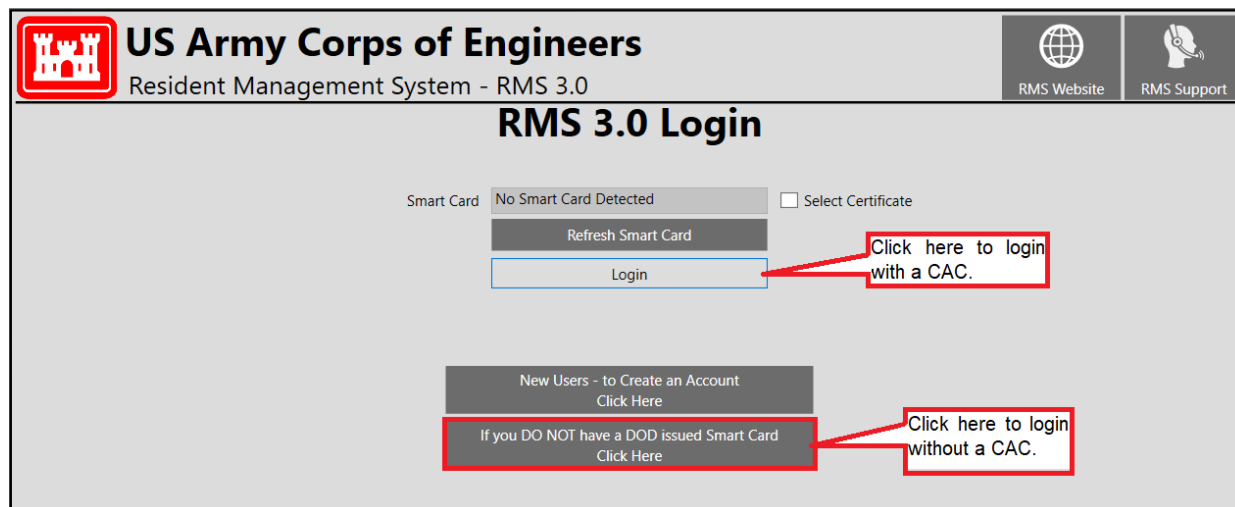
Prime Contractor ID	Prime Contractor Name	USACE District
A0000264	LAWELAW Technology Service	HUNTSVILLE CENTER (A0:A0)
E1000118	The Ranger Group, LLC	TEST DISTRICT - T2 (T2:E1)

If this loading pop-up screen states that RMS is “Checking Prime Contractors for user,” contact an RMS Administrator as the user account has not been properly linked in the system.



### 2.3.7 Log into RMS

Users without DoD-issued smart cards must log in using an email address and password. Click on the box demonstrated below to change the login screen.



To log in without a CAC, enter the email address and a 15-character password used to register the account, then click on the [Login](#) button.

**US Army Corps of Engineers**  
Resident Management System - RMS 3.0

**RMS 3.0 Login**

Enter the email address used to create the account as the User Name.

User Name   Remember my User ID

Password

Login

Click here to change a password.

[Reset forgotten/expired password](#)

[Change password](#)

Click here to reset a forgotten or expired password.

New Users - to Create an Account  
Click Here

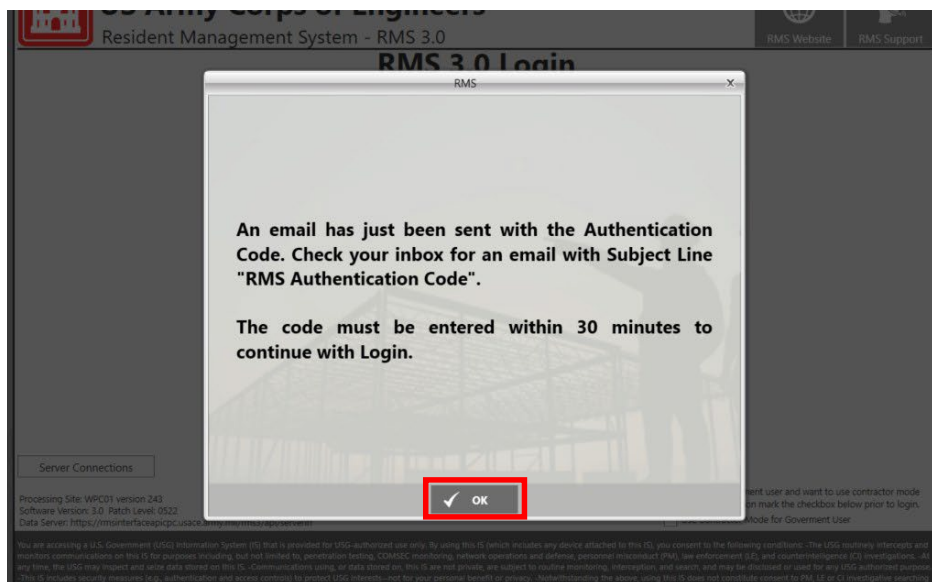
If you have a DOD issued Smart Card  
Click Here

Server Connections

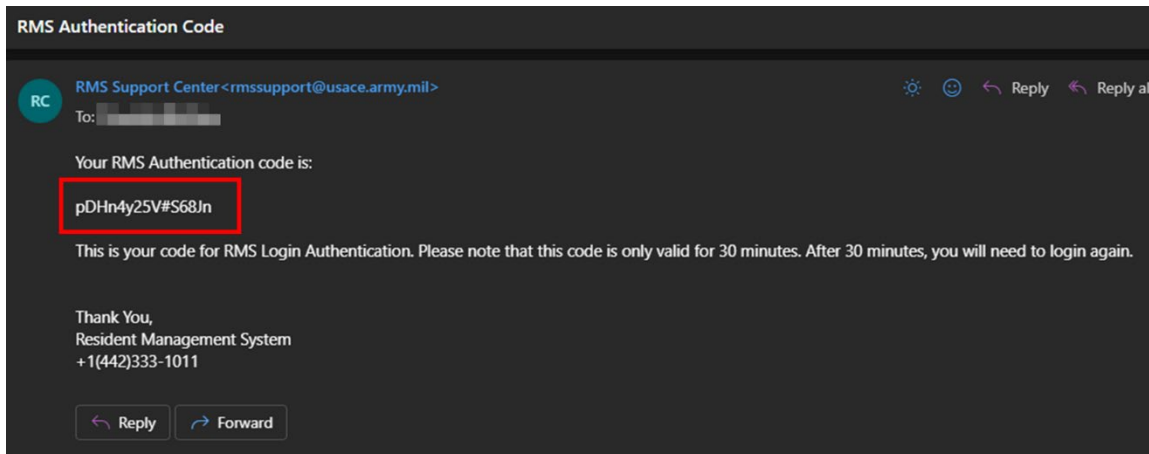
Processing Site: WPC01 version 160  
Software Version: 3.0 Patch Level: 0390  
Launcher Version: 3.0 Patch Level: 31  
Data Server: https://rms.usace.army.mil/rms3/api/serverinvoke0005/

If you are a government user and want to use contractor mode for the current session mark the checkbox below prior to login.  
 Use Contractor Mode for Government User

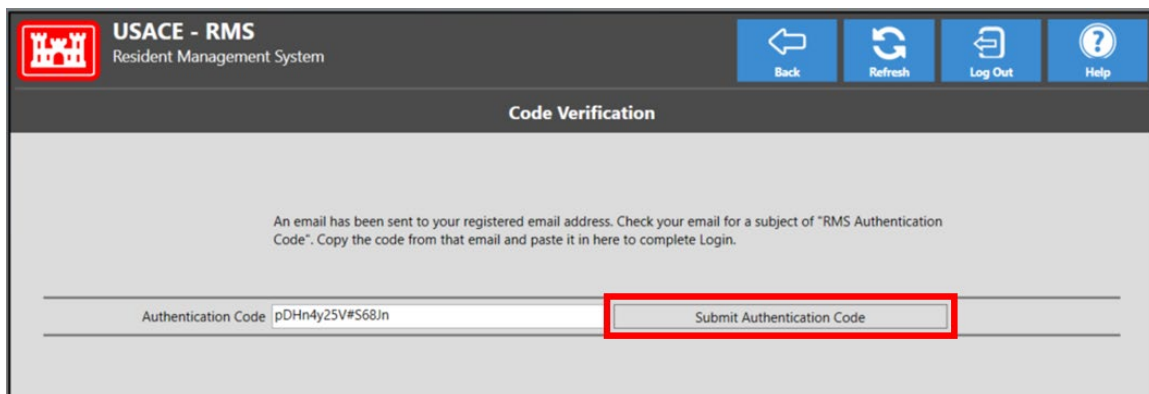
Logging in with an email address and password will require multi-factor authentication. A pop-up will appear to provide instruction on where the Authentication Code can be found. Click [OK](#) to proceed to the Code Verification screen.



Check the inbox for the email address used to register the account to find the authentication code. The email will be titled "RMS Authentication Code."



Copy the received code and paste into the [Authentication Code](#) field. Click the [Submit Authentication Code](#) button to complete login.



### 2.3.7.1 Account Lockout

When users enter an incorrect password three or more times, the user's account becomes locked. If the user's account is locked, the only way to unlock the account is to change the user's password. See section on [Forgotten Password / Change Password](#).

**Note:** Only non-CAC login users will have to follow these steps when locked out of a user account. If a CAC user enters the PIN too many times, that user will need to follow USACE policies for unlocking the locked CAC.

### 2.3.7.2 Forgotten/Expired Password vs. Change Password

RMS passwords must be changed every 60 days. Users are not allowed to reuse any of the last 5 passwords and users can only change passwords once in a 24-hour period.

From the login screen, click on the [Reset forgotten/expired password](#) or [Change Password](#) links to start the process of changing a password.

User Name   Remember my User ID

Password

[Reset forgotten/expired password](#)

[Change password](#)

The [Reset forgotten/expired password](#) option allows users to update the login password when the password has either been forgotten or the password has expired.

The [Change Password](#) option allows users to update the login password only when the old password is still functional.

**Note** that once a password has expired, the user must use the [Reset forgotten/expired password](#) link.

[Reset forgotten/expired password](#) screen:

**Forgotten/Expired Password**

To reset your forgotten or expired password you will need a password reset code. You can use this page to request that a password reset code be sent to the email address on file. Once you receive the password reset code, enter it here, then create a new password for your account.

Work Email Address   **Step 1.**

Password Reset Code  **Step 2. Copy code from email**

New Password  **Step 3. Copy suggested password**

Confirm New Password   **Step 4. Click Submit for Password Reset button**

Passwords must meet the following complexity and security requirements:

15 characters or longer	Must start with an uppercase or lowercase letter
2 uppercase letters	Cannot contain four consecutive alphabetic characters in any order (Eee or ThAt)
2 lowercase letters	Cannot contain repetitive characters (AA, ==, bb, 44)
2 numeric characters	Do not use a dash (-) as the last character of the password
2 Special Characters	Only contains these special characters - _ = ^   :
Cannot reuse last 5 passwords	
Cannot change password within 24 hours of last change	

The below randomly generated passwords are valid and can be used as a new password.

Example 1 <input type="text" value="pb7kCF5=Y8 x7xF"/>	Example 2 <input type="text" value="mf_kR7e2Dt8)=JF"/>
Example 3 <input type="text" value="Gn6Dp5nc2Y_=M72"/>	Example 4 <input type="text" value="jT6wB-CQ4TKj_N8"/>
Example 5 <input type="text" value="Gu=k3nG4H-6mc3n"/>	Example 6 <input type="text" value="fVP-C^3qC4pg4uC"/>

[Change Password](#) screen:

**Change Password**

To change your password you will need a password reset code. You can use this page to request that a password reset code be sent to the email address on file. Once you receive the password reset code, enter it here and complete the steps to change your password.

**Step 1.**

Work Email Address:

Password Reset Code:

Current Password:

New Password:

**Step 5. Click Submit Password Change button**

Confirm New Password:

Passwords must meet the following complexity and security requirements:

15 characters or longer	Must start with an uppercase or lowercase letter
2 uppercase letters	Cannot contain four consecutive alphabetic characters in any order (EeEe or ThAt)
2 lowercase letters	Cannot contain repetitive characters (AA, ==, bb, 44)
2 numeric characters	Do not use a dash (-) as the last character of the password
2 Special Characters	Only contains these special characters - _ = ^   :
Cannot reuse last 5 passwords	New password must be different from current password by at least 8 characters
Cannot change password within 24 hours of last change	

The below randomly generated passwords are valid and can be used as a new password.

Example 1: qf-M3Pj7ErXQ7K	Example 2: nh=HQH8nR8akT6^
Example 3: EDp7K-q65v^5Y3H	Example 4: Pq4m=f3Ew_Ve2du
Example 5: Ba^bG8ZE5C=3Zy6	Example 6: tZ3X-=RG6Hb3UN3

For either screen, the first step is to enter the email address for the RMS account, if it is not already populated, and click on [Request Password Reset code](#) button.

Copy the Password Reset Code, which is sent to the email address displayed in the Email Address field, into the field for the Password Reset Code (see figures above).

After the Reset Code has been copied, if using the [Change Password](#) option, enter the current password in the [Current Password](#) box. For both options, users will then need to create or copy a suggested password in the [New Password](#) boxes.

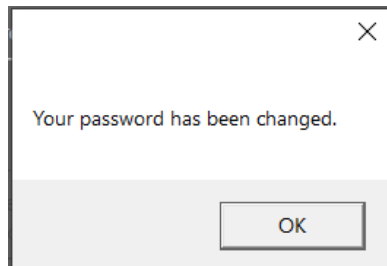
**Note:** If either the [New Password](#) or [New Password Confirmation](#) boxes are outlined in red, the passwords either do not match or do not meet the complexity requirements.

**Note:** Password complexity must follow these standards EXACTLY:

Passwords must meet the following complexity and security requirements:

15 characters or longer	Must start with an uppercase or lowercase letter
2 uppercase letters	Cannot contain four consecutive alphabetic characters in any order (EeEe or ThAt)
2 lowercase letters	Cannot contain repetitive characters (AA, ==, bb, 44)
2 numeric characters	Do not use a dash (-) as the last character of the password
2 Special Characters	Only contains these special characters - _ = ^   :
Cannot reuse last 5 passwords	
Cannot change password within 24 hours of last change	

Once the passwords match and the complexity is met, the [Submit Password for Reset](#) button will become selectable and can be clicked to complete the password change process.

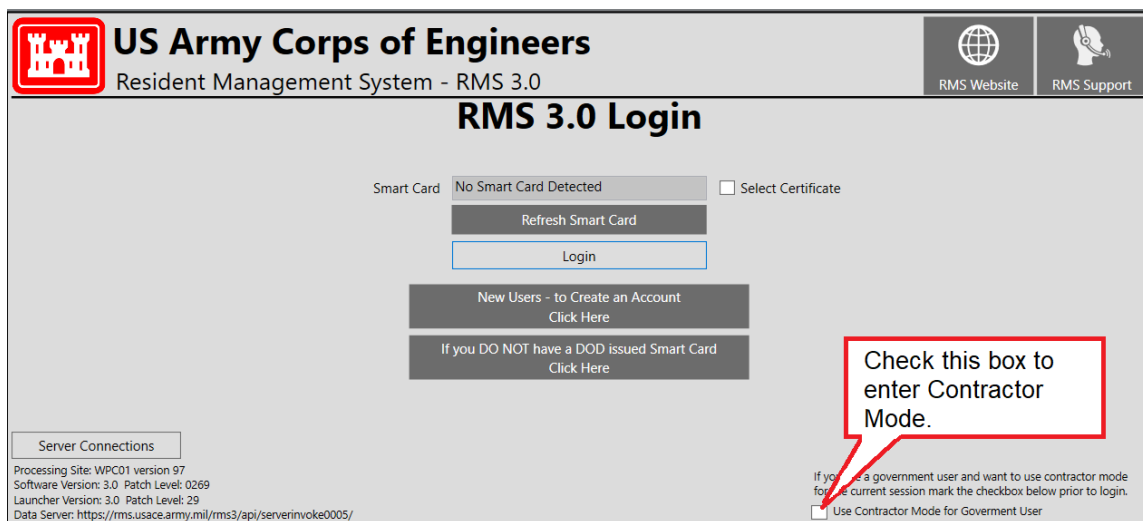


Then proceed to log in using the new password.

**Note:** Users must follow USACE regulations with regards to password protection. Do not write down passwords Do not store passwords online without encryption.

### 2.3.8 How to Use Contractor Mode for Government User

There is the capability for Government users to access Contractor Mode. However, this access must be arranged either through an RMS System Administrator or the Contractor's System Administrator. The extent of access will be determined by the RMS Administrator granting the access. If the need for access arises, discuss the access needs with one of the RMS Administrators. To enter Contractor Mode, check the box on the login screen before logging in.



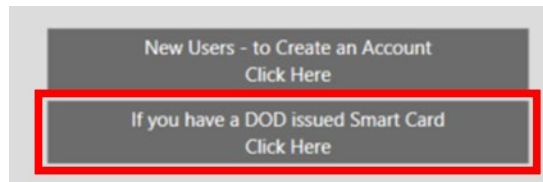
### 2.3.9 Government Mode Home

A successful login will bring up the Government Mode home screen. To navigate to a District's contract list, click on the desired District in the map. The last four Districts accessed will be listed in [Recently Used](#) area. To see all the Districts within a Division, click on the desired Division under [USACE Divisions](#). The selected Division's Districts will be listed below the Division list.

This design allows a user to easily access contracts outside the District. However, access is still restricted. It must still be granted by the District's RMS Administrator who will also assign a [User Role](#).

To change the login type (CAC login or non-CAC login), click on the corresponding button below the [Login](#) button.

Change to CAC login:



Change to non-CAC login:



Select [Clear RMS Cache \(data downloaded to speed up access to the data\)](#) to clear data that was downloaded to the user's computer that may be out of date.

**US Army Corps of Engineers**  
Resident Management System - RMS 3.0

Last Login: 8/29/2025 2:56:56 PM

Select a District to Access RMS Data

Processing Site: WPC01 version 271  
Software Version: 3.0 Patch Level: 0566  
Data Server: https://rmsinterfacepicpc.usace.army.mil/rms3/api/server

[Clear RMS Cache](#)  
[For latest RMS news click here](#)

**Recently Used**

- Baltimore Test (T2)
- Far East Test (T1)
- Omaha
- Gulf Region

**USACE Divisions**

- Pacific Ocean Division
- Northwestern Division
- South Pacific Division
- Southwestern Division
- Mississippi Valley Division
- Great Lakes & Ohio River Division
- North Atlantic Division
- South Atlantic Division
- Transatlantic Division

**North Atlantic Division**

- Baltimore
- New England
- New York
- Norfolk
- Philadelphia
- Europe

You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG-authorized use only. By using this IS (which includes any device attached to this IS), you consent to the following conditions: -The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations. -At any time, the USG may inspect and seize data stored on this IS. -Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose. -This IS includes security measures (e.g., authentication and access controls) to protect USG interests—not for your personal benefit or privacy. -Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

To see recent news and announcements regarding RMS, click on the [For latest RMS news click here](#) link. This link will take the user to the RMS website homepage.

RMS sessions terminate after six hours of inactivity. This session termination will log the user out of the system automatically due to inactivity. Inactivity, as defined by RMS, occurs when the user's computer is in one of the following states for more than six hours while running RMS:

- Running but idle with no mouse movement or keystrokes

- Locked
- Logged off
- Sleep mode
- Hibernation
- Loss of server connection while in any of the above states

When a session expires and a user is logged out of the application due to inactivity, the details for the logout will be recorded on the Login View.

**US Army Corps of Engineers**  
Resident Management System - RMS 3.0

**RMS 3.0 Login**

Logged out due to inactivity 1/23/2025 10:33:58 AM

Smart Card

Refresh Smart Card

Login

## 2.4 Document Packages

Letter No. C-123519      GOVERNMENT: Complete a document package for this letter using this document package manager. The document package should include the letter itself and any applicable supporting documents.

Document Packages

Add	Title of Package	Status	No.
Edit >	Letter No. C-123519	Not Ready	1
Delete			

Document Packages are used throughout RMS to facilitate the inclusion of supporting documents. Document Packages are typically created after completion of the data entry of a record; the system will create a new package and add a PDF copy of the form for the Contractor to sign and submit to the Government.

**Document Package: Letter No. H-12440**

All Attachments	PDF Documents	Word Documents	Excel Files	Powerpoint Files	
1	1	0	0	0	<div style="border: 1px solid red; padding: 5px; display: inline-block;">           Drag and Drop Attachment Files Here  </div> <div style="display: inline-block; vertical-align: top; margin-left: 10px;"> <div style="border: 1px solid red; padding: 2px; margin-bottom: 2px;">Generate Letter</div> <div style="border: 1px solid red; padding: 2px; margin-bottom: 2px;">Sign Selected Documents</div> <div style="border: 1px solid red; padding: 2px;">Export Selected Documents</div> </div>
	JPEG/JPG Images	Text Files	CSV Files	Email	
	0	0	0	0	

**All Attachments** Search  Export

Add
Edit
Delete

Primary	Date of the Docum	Document Title	Contractor Signature Status	Government Signature Status	Status
		o. H-12440 - TEST1-PDF.pdf	Not Signed	Not Signed	Document not Ready

Add From File System
Add From RMS Mobile Data

CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

Individual File Information

Date of the Document:  Signed By:

Document Title:

Description:

Manually signed by Contractor  
 Manually signed by Government

Document Package

GOVERNMENT: *Document package processing will be handled by the view.*

Government Review Notes:

Contractor Notes to Government:

While there is currently no limit to the number of attachments in a package, the maximum file size for any one attachment is 500MB. There is no limit on the number of documents that can be added to a Document Package, nor is there a limit on the number of Document Packages that can be associated with an item in RMS. Once uploaded or generated, the date is set on documents and cannot be changed by users. For example, a Document Package for a Correspondence Letter Log entry can contain both a PDF of the actual letter and a PDF with an enclosure. Document Packages can be Contractor, Government, or Shared between the Government and Contractor in RMS. In transmittals, one package contains the signed ENG 4025 required to submit the transmittal and a second package can be added after review that contains expanded Government remarks.

**Add:** Add/create a new package.

**Edit:** Edit/modify an existing package.

**Delete:** Delete/remove an existing package.

**Note:** As stated in the above screenshot, any attachments that contain Controlled Unclassified Information (CUI) uploaded to the RMS Application should include CUI markings in the header and footer of the document. Attachments may be used in the management of contracts and will be stored in the database. When CUI marked documents are printed or downloaded and disseminated, CUI handling requirements should be followed. If needed, a CUI Cover Sheet

is available in the Contract Reports Admin area. The highest possible classification is CUI for any information or documents kept in RMS.

Only one user can make updates in a Document Package at once. If a user makes an update in a Document Package while another user is working in that same Document Package, then the alert below will be presented.



### 2.4.1 Working with Document Packages

There are many types of files that can be attached. The blue tiles identify the types of files that can be attached to the Document Package. Click on a tile to view the list of files of that file type that have been included in the Document Package.

**Note:** For a full list of prohibited file types in RMS, see [Prohibited File Types in RMS](#) in Appendix B.

Add documents to the Document Package either by dragging and dropping the file into the [Drag and Drop](#) tile or by selecting [Add](#). The [Add](#) button gives two options:

[Add From File System](#): Use this selection to add a file that resides in the local file system of the computer being used.

[Add From RMS Mobile Data](#): Use this selection to add a file that has been imported into RMS using its mobile app.

**Note:** The mobile app feature is no longer supported by the RMS Support Center. If users already have this feature installed and connected to the user's RMS Login, it can still be used. However, no new users will be able to set this up.

[Generate Letter](#): Create a letter in RMS using one of the Word Templates stored in [District Library | Word Templates](#).

[Sign Selected Documents](#): Attached .doc (Word) and .pdf documents can be electronically signed in RMS. Word documents that are electronically signed in RMS will be automatically converted to PDF documents. A Common Access Card (CAC) is not needed to perform this action. Click on this button, then select the documents to be signed from the list that is shown.

**Note:** RMS is currently not able to output pictures included in the headers of Word documents when conversion to PDF occurs after signing.

**Export Selected Documents:** To save attached documents outside of RMS, click on this button, then select the applicable documents from the list that is shown.

**Note:** There are two types of Document Packages in RMS, one that is visible by both Contractor and Government Mode and one that is only visible to the Government. To determine which Document Package to use, if it needs to be viewed by the Contractor, choose the Contractor or Shared Document Package.

Transmittal \*01 33 16.00 10\*01 3-1 **Shared Package:** Complete a document package for the transmittal package and submit it using this document package manager. The document package should include the signed 4025 and all supporting documents.

Signed	Title of Package	Status	No.
	Transmittal *01 33 16.00 10*01 3-1	In Review	1

Document Package visible in both Government and Contractor modes of RMS.

Transmittal \*01 33 16.00 10\*01 3-1 - Item 1 **CONTRACTOR:** Complete a document package for the transmittal of this submittal item and submit it using this document package manager. The document package should include all documents necessary for the review of this item.

Title of Package	Status	No.
Transmittal *01 33 16.00 10*01 3-1 - Item 1	In Review	1

Document Package that is only visible in Government mode of RMS.

Transmittal \*01 33 16.00 10\*01 3-1 **Government:** Complete a document package for the transmittal package and submit it using this document package manager.

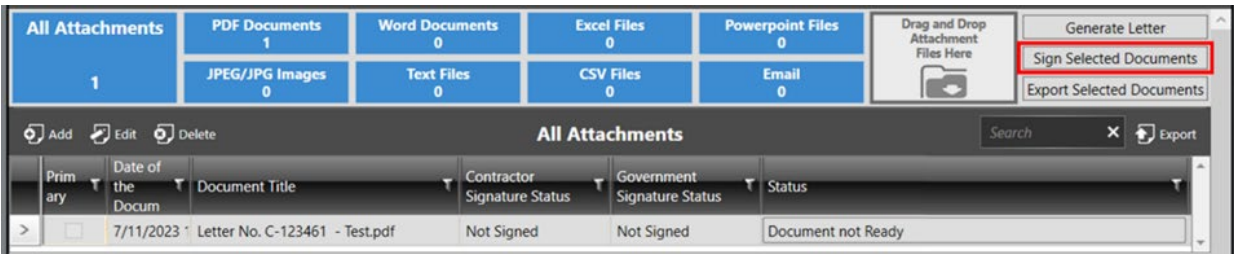
Signed	Title of Package	Status	No.
--------	------------------	--------	-----

Statuses for Document Packages are listed below:

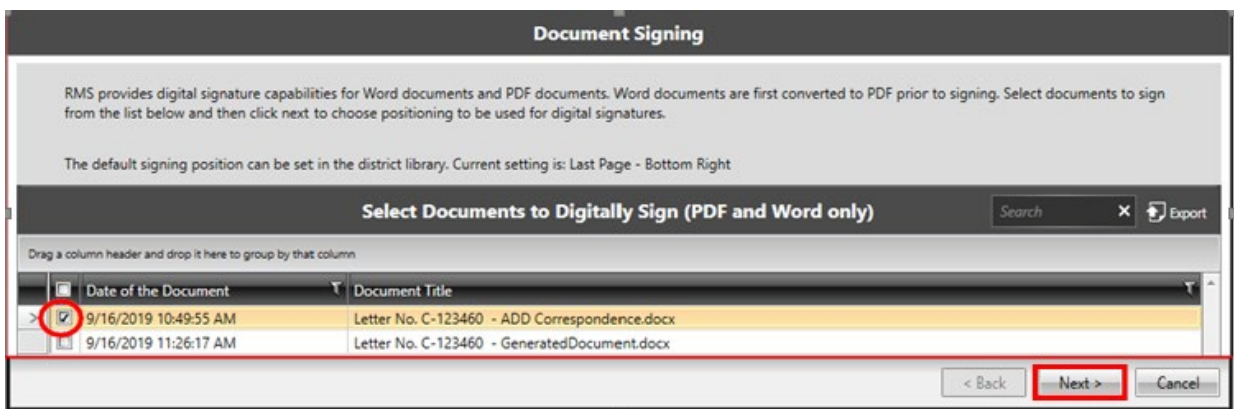
- **Not Ready:** The Document Package has not been submitted for review.
- **In Review:** The Document Package has been submitted for review.
- **Accepted:** The Document Package has been accepted.

## 2.4.2 Signing Documents

First, single click on a file in the Document Package, then click on the [Sign Selected Documents](#) button. After clicking on [Sign Selected Documents](#), the screen below will be displayed.



Place a check in the box of all documents to be electronically signed in RMS. Then click on the [Next](#) button. This action needs to be performed by the person whose signature will be added to the document. Once initiated, there is no means to change the signature name or select a name other than that of the logged in user. Once the document is signed, there is no way to remove the signature from the document. The document must be deleted, and the signature process started over.



**Select Signature Title:** If the signature requires a title, enter it in the box provided or click on the button to select one of the signature blocks associated with the logged in user. Signature blocks are defined in the [RMS Staff](#) module.

**Use Signature Title for future signatures:** Checking this box will set the default signature title for this user on all future correspondence. This default can be changed or removed at any time.

RMS will automatically place the signature of the logged in user on the *Last Page, Bottom Right*, unless another position is selected. To select an alternate position, double click on the [Digital Signature Position](#) box, then click on the ellipses button (a box with three horizontal dots) on the right edge of the box. A list of alternate signature locations will be displayed. Select the desired position and click on the **OK** button at the bottom of the lookup box. An RMS District Administrator can add custom signature locations if a signature location does not exist for the document that is being signed. See section 3.3.19 [Document Signature Positions](#).

Click on *Finish* to complete the process. This will bring up a confirmation box that requires the logged in user to confirm the logged in user's identity by entering the logged in user's PIN or RMS password, depending on the method used to log into RMS.

### 2.4.3 Document Details

**Individual File Information:** This section will provide the details for the document selected within the Document Package.

**Date of the Document:** RMS automatically assigns the date in which the document is added to the Document Package.

**Signed by:** The individual who signed the document will be listed here.

**Document Title:** RMS automatically names the document with the package and file name. However, this field is editable. Click in the box to change the title of the document.

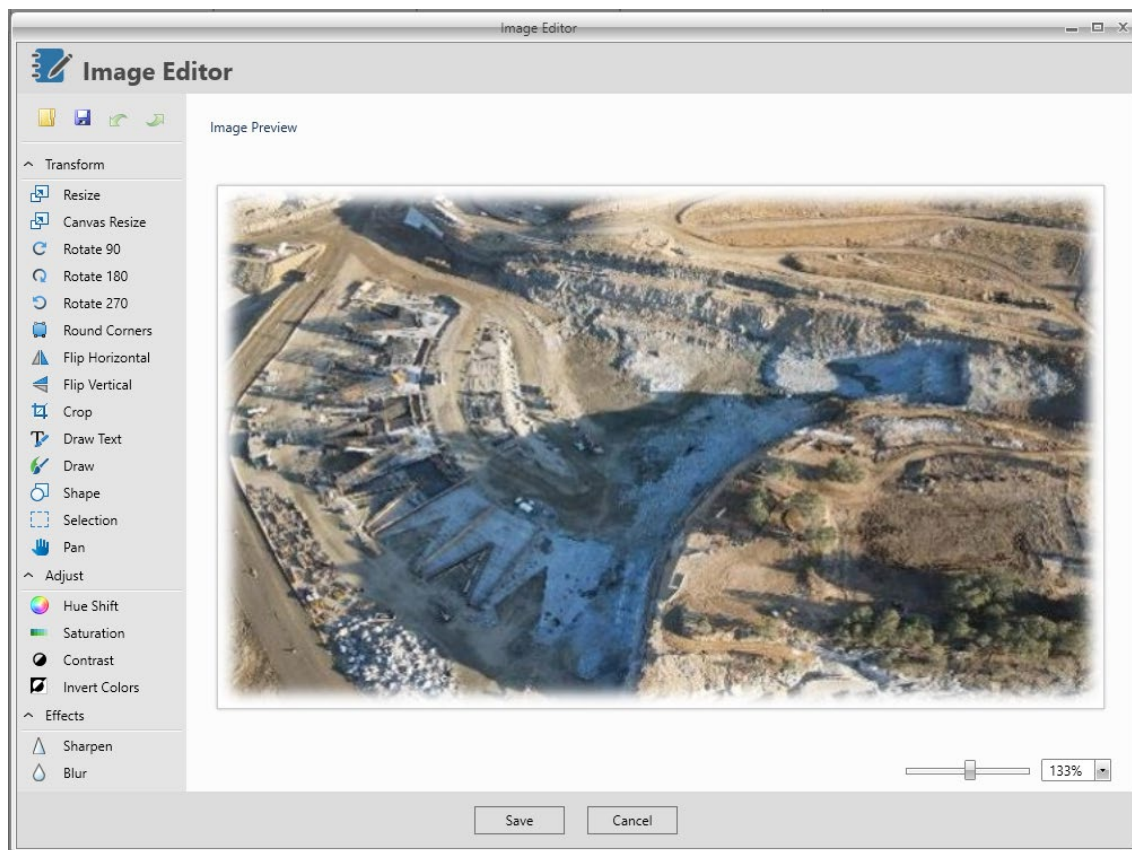
**Description:** This is a memo field that can be used to describe, summarize, or place notes about the document.

**Manually signed by Contractor:** This checkbox is used to indicate whether the document was signed outside of RMS by the Contractor. For example, if the Contractor signed the document in Adobe, then uploaded the document into the Document Package.

**Manually signed by Government:** This checkbox is used to indicate whether the document was signed outside of RMS by the Government. For example, if the Government signed the document in Adobe, then uploaded the document into the Document Package.

**Edit Document:** This feature is only available on unsigned documents. Once a document is electronically signed in RMS, the document can no longer be edited. The document types that can be edited in the Document Package are Word, Excel, PowerPoint, Text, and CSV. RMS will open the selected document in the program with which to edit it.

**Edit Image:** This button will only show if an image is selected in the Document Package. Clicking on this button will present the Image Editor screen.



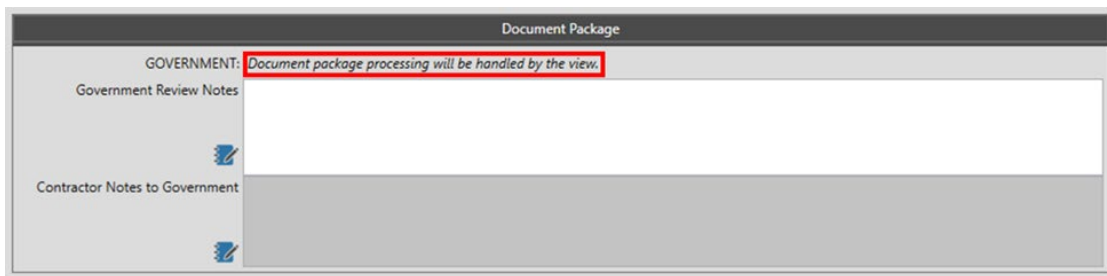
**View Document/Image:** Select this button to open the document or image in a read-only/view mode.

**Save Document/Image to File:** This button will allow the user to save the selected document or image as a file in the local file system.

## 2.4.4 Completing Document Packages

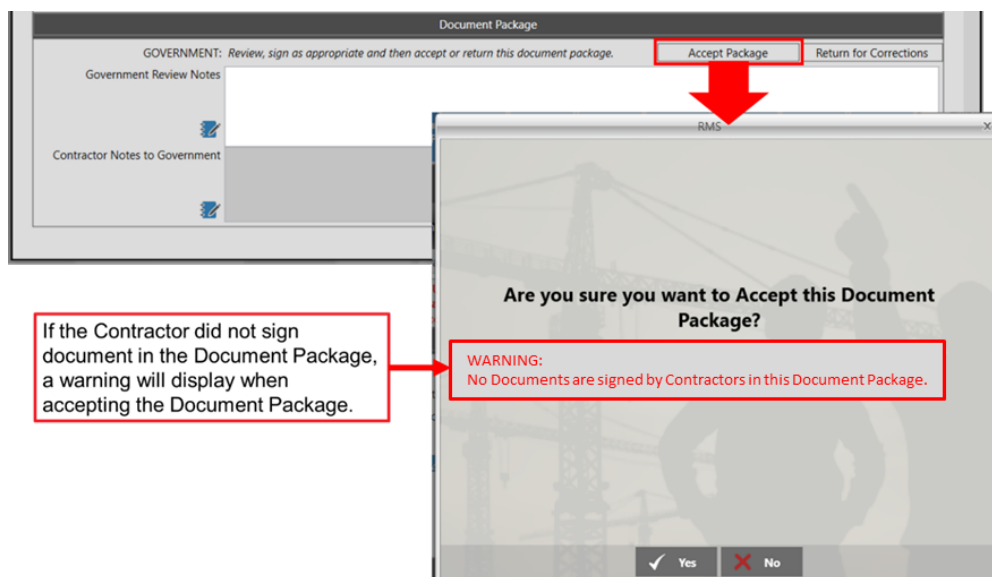
Document Packages in RMS must be completed with all documents signed, either electronically or manually, unless otherwise directed in the District policy.

There are two different ways Document Packages are completed/accepted. One way is with the completion/acceptance of the containing item. For example, when an RFI is accepted within the [Request for Information](#) module, the Document Package is also accepted. These types of Document Packages are identified by the lack of any button(s) to complete or accept the package. For instructions on accepting/completing these types of packages, please see the section on the module in which the Document Packages reside.



Another way Document Packages are completed or accepted is with the presence of a [Complete](#) or [Accept](#) button. When buttons are available to complete/accept a Document Package, users will click the button to start the process of completion/acceptance process. RMS will first check to see if there are any word or PDF files that have been signed within the package. When RMS detects that none of the attachments in the Document Package have been signed, a prompt will display to provide an opportunity to sign the attachments or return the package back to the Contractor to sign the documents and resubmit.

Before accepting the Document Package, take the time to ensure that all documents requiring a signature have been signed, and those signatures are confirmed in the [Signature Status](#) column.



**Government Review Notes:** Enter any explanatory notes or other information regarding this Document Package.

**Contractor Notes to the Government:** Any notes the Contractor wished to send may be added there.

**Return for Corrections:** If there is anything missing or incorrect in the Document Package, clicking this button will allow for the Contractor to make changes/adjustments to this Document Package.

**Accept/Complete Package:** After all the documents in the package have been added and signed, if needed, the package must be designated complete. This is done by clicking on the **Complete Package** or **Accept Package** button. Once a package is completed/accepted, users can no longer make further edits, so double check the documents before finalizing this action.

**Note:** Only full district administrators can delete completed/accepted Document Packages.

Contractor Insurance - [0123]      *CONTRACTOR: Complete a document package for this Subcontractor Insurance and Form SF 1413, and submit it using this document package manager. The document package should include the insurance documents, signed Form SF 1413, and any applicable supporting documents.*

		Title of Package	Status	No.
Accept	Add	> Contractor Insurance - [0123]	In Review	1
Return	Edit			
Delete				

QA Test AT-00001      *Government: use this document manager to include a document package for this QA Test.*

		Title of Package	Status	No.
Complete	Add	> QA Test AT-00001	Not Ready	1
	Edit			
Delete				

When buttons are present within the Document Package, similar buttons are also available outside the Document Package for all existing Document Packages within the data grid.

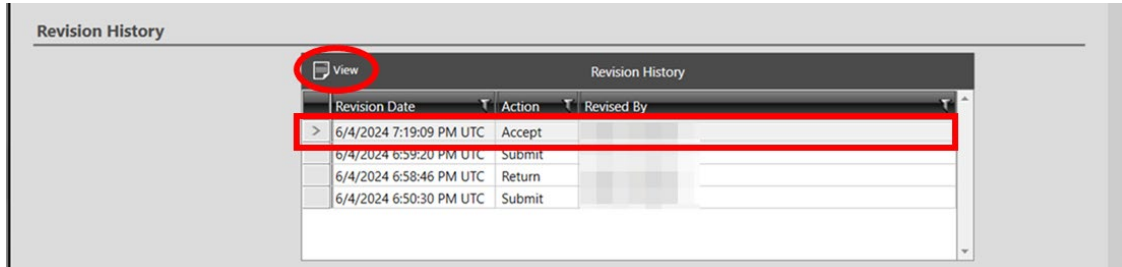
- The **Accept** and **Return** buttons will be available for Contractor-submitted Document Packages.
- The **Complete** button will be available for Government-generated Document Packages.

When these buttons are used, the corresponding action will occur on all existing Document Packages that contain documents within the data grid. Any Document Packages that are empty and do not contain any documents will be deleted when one of these buttons is used.

**Note:** If the work performed in a module dictates the handling of the Document Package(s) for that module, the **Accept**, **Return**, and **Complete** buttons will not be available on the Document Package data grid nor inside the Document Packages.

## 2.4.5 Revision History

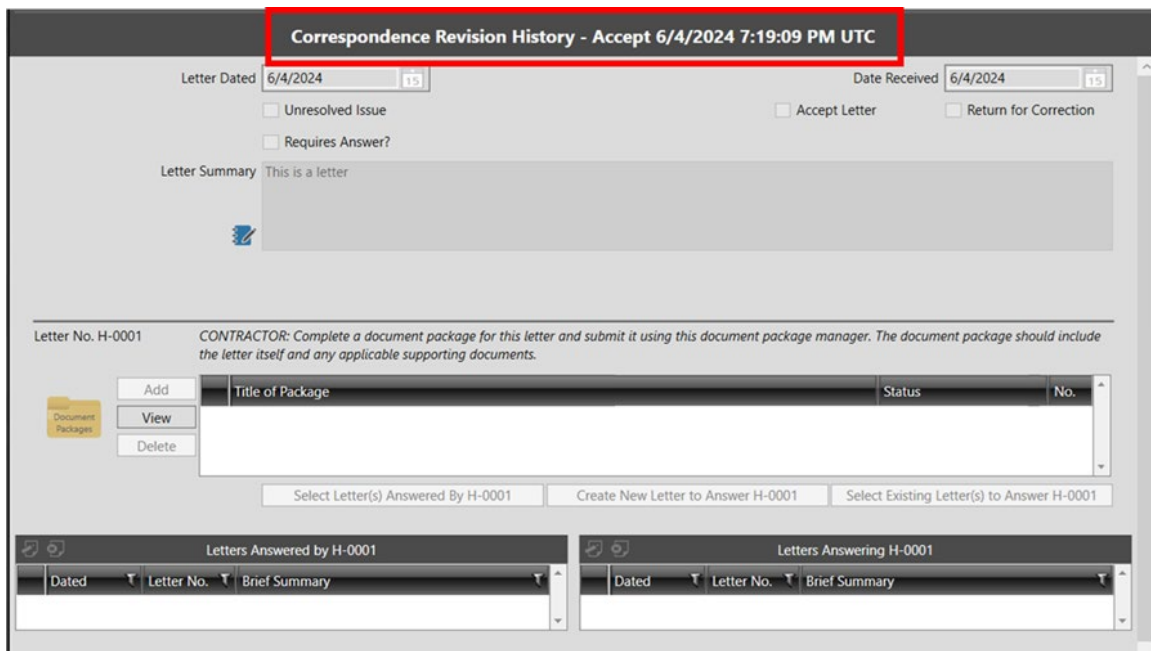
Revision History is used to track module and Document Package changes when items are submitted for Government review, rejected/returned for corrections, completed and/or accepted.



Revision Date	Action	Revised By
> 6/4/2024 7:19:09 PM UTC	Accept	
6/4/2024 6:59:20 PM UTC	Submit	
6/4/2024 6:58:46 PM UTC	Return	
6/4/2024 6:50:30 PM UTC	Submit	

Each entry in the revision history table will display the date/timestamp (UTC) of the action, the action taken, and the logged in user who initiated this action. A revision entry can also be opened and viewed by selecting the revision and clicking the [View](#) button, which accompanies all [Revision History](#) tables throughout RMS, or by double clicking on the revision entry. The presented view will show the state of the item before the action listed was taken.

As shown in the example below, a view of the item before acceptance is presented when examining an [Accept](#) revision. In this view, users not only see a snapshot of the view prior to the action, but the date/timestamp, in UTC, that the action was taken. This view will also be restricted, and no edits may be made on this screen. Any Document Packages added prior to this action will also be accessible and viewable the same way, even when outside of a revision entry.



**Correspondence Revision History - Accept 6/4/2024 7:19:09 PM UTC**

Letter Dated: 6/4/2024 Date Received: 6/4/2024

Unresolved Issue  Accept Letter  Return for Correction

Requires Answer?

Letter Summary: This is a letter

Letter No. H-0001 **CONTRACTOR: Complete a document package for this letter and submit it using this document package manager. The document package should include the letter itself and any applicable supporting documents.**

Title of Package	Status	No.

Select Letter(s) Answered By H-0001    Create New Letter to Answer H-0001    Select Existing Letter(s) to Answer H-0001

Letters Answered by H-0001			Letters Answering H-0001		
Dated	Letter No.	Brief Summary	Dated	Letter No.	Brief Summary

### 3.0 LIBRARY MODE

After selecting the District where the desired contracts are located, Library Mode will display. The actions taken here are not specific to a contract, but rather affect all contracts in the selected District. Use the modules in this area to describe office setup, establish settings/entries for use across the District, run District-wide reports, and identify users with the allowed level of access.

While most of the information in this area can be viewed by users, editing data contained here is limited to staff with specific permissions to do so. Users with Office Admin rights can view the information in this module but can only edit the Office's information for which the user is an Administrator. Users without system, District, or Office Administrator rights cannot use or view this module.

Contract/Delivery Order No.	Contract ID	Full Title of Contract	Office Name	Contract Stage
DACW31-01-C-0016	E1000044	Hudson Branch, Sec 14	Bay Area Office	Final Payment Made
DACA31-99-D-0021 0005	E1000059	NANSEMONT ORDANANCE DEPOT	Baltimore ** TEST ** Area	Active

The **Library Mode** menus are:

**Local Office:** Enter and store information and policies related to the offices subordinate to the selected District. Only users with Office Admin Rights can edit this module.

**District Office:** Enter and store information and policies specific to the selected District Office. Only users with District Admin Rights can edit this module.

**District Library:** The District Library is the repository for data selections set at the District to establish data consistency across the District. Only users with District Admin Rights can edit this module.

**System Library:** The System Library is the repository for data selections set by HQUSACE to establish data consistency across the Corps of Engineers. With a few exceptions, data found in this module cannot be edited by anyone. It is READ ONLY to all users.

**Summary Reports:** Use the reports found in this module to execute reports that cover more than one contract. These can cover all contracts in the District or a defined subset.

**RMS GIS:** The geographic location of contracts meeting the criteria of predefined queries are displayed on a map along with tabular data related to the query. Only contracts in which latitude and longitude coordinates have been entered are included in the query results. See

## Administration | Contract Description.

**User Settings:** Use to set user preferences of the logged in user.

**RMS Mobile:** Set up a connection between a mobile device (iOS or Android) and RMS to enable uploading notes, videos, and images.

**RMS Staff:** Used by the District or System Administrator(s) to manage staff across the District with access to RMS.

### 3.1 Local Office

Open this menu to view and manage information affecting each of the offices in the District. Only Office Administrators can edit data in this module. Office Administrators can view information in this module, but edits are restricted to the office for which admin rights are assigned.

The screenshot displays the RMS interface for the T2 Baltimore Test District. At the top, there is a header bar with the district logo, name, and statistics (56 Offices, 1,810 Staff, 1,127 Contracts). Below this is a navigation bar with buttons for Government Mode Home, Back, Refresh, Log Out, and Help. The main menu is titled "Local Office Menu - T2 Baltimore Test District" and features an "Office Tree" section with a list of offices and a grid of menu options.

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive

The **Local Office** menu consists of:

**Office Tree:** Display a graphical representation of the District's office hierarchy structure.

**Office Description:** Store office logistics, such as address, phone, GPS location, time zone, focal points, etc.

**Office Policy:** Set the local rule for creation and editing of the QA Daily Report.

**Office Documents:** Not Used.

**Mod Routing Slip:** Create standard routing slips for ACO and KO mods.

**Interface Schedules:** View frequency and times for automatic data import from CEFMS and P2.

**Office User Entries:** Enter standard text for user-defined macros.

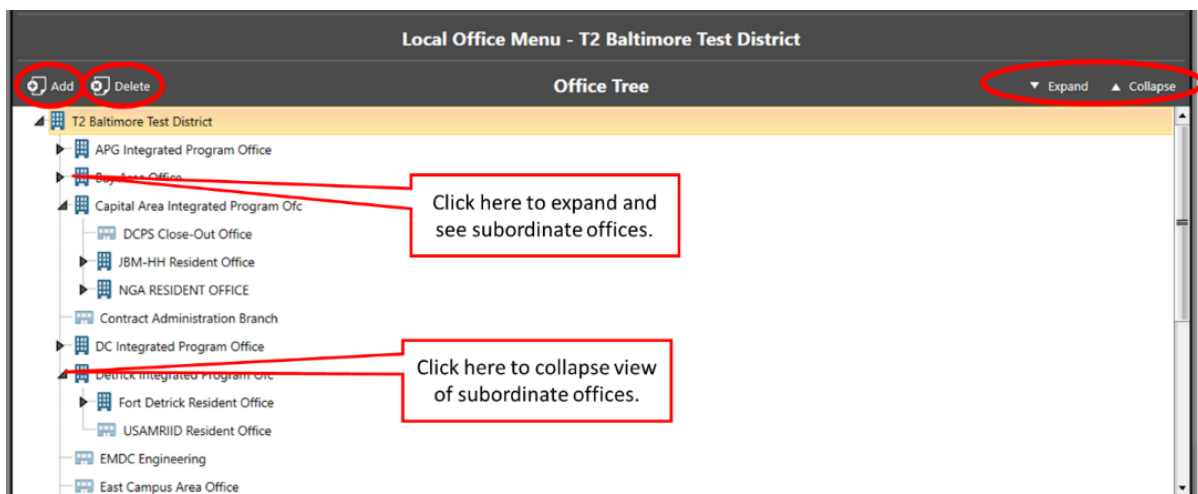
**Local Office Milestones:** Manage local office milestones.

**Local Office Contract Archive:** Manage local office contract archive information.

### 3.1.1 Office Tree

When first accessed, only the name of the District Office is visible. Use the arrowhead widgets to manage the view. To expand and collapse an office, click on the arrowheads next to the office. To expand or collapse the entire District, use the labeled widgets.

To add an office, highlight the office under which the new office is to be added, then click on [Add](#).



The Parent Office for the new office can still be changed if the incorrect office was selected. Click on the blue box to display a list of offices from which to select. Highlight the office, then click on **OK**.

**Add USACE Office**

The following information is required to add a new USACE Office

Name of new office:

Office Symbol:

Offices Gref:

**OK**

**Office Lookup**

Offices

Office Symbol	Office Name
CELRD	Lakes and River Division
CENAB-NGA-MB	Main Building Project Office
CENAB-DET-RIID	USAMRIID Resident Office
CENAB-DET-RES	Fort Detrick Resident Office
> CENAB-COF-BAS	North Substation Resident Office
CENAB-COF-EC	East Campus Area Office
CENAB-COF-BFD	Detrick Resident Office
CESAD	South Atlantic Division
CENAB-COF-HTS	Northeastern Resident Office
CENAB-COF-HA	Harrisburg Area Office
CENAB-COF-HNC	New Cumberland Resident Office
CENAB	Baltimore District
CENAB-COF-CA	Capital Area Integrated Program Ofc
CENAB-COF-EA	Environmental Remed Res Ofc

**OK** Cancel Clear Selection

Clicking on **OK** opens the **Office Description** screen.

To delete an office, highlight the office to be deleted, then click on **Delete**. An office can be deleted only when there are no contracts, sub-offices, or staff assigned to that office. Before proceeding with the delete, first move its contents to another office or if no longer needed, delete it entirely.

### 3.1.2 Office Description

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive



**T2 Baltimore Test District**

1,044 Staff, 164 Contracts

Government Mode Home

Contract Selection

Back

Refresh

Log Out

Help

---

**Office Description - T2 Baltimore Test District**

Parent Office: North Atlantic Division Select Parent office

Office Symbol: CENAB

Office Name: T2 Baltimore Test District

Address Line 1: U.S. Army Corps of Engineers

Address Line 2: 10 South Howard Street, Room 7000

Address Line 3: Baltimore, Maryland 21201-2536

Select location on map    Office Latitude: 38.9775600795521    Office Longitude: -76.5053558349611

Office Type: TRAINING OFFICE

Office Manager: Solo, Han

Position Title: Resident Engineer

Office Phone: (410) 962-3026

Office Fax: (410) 962-3966

---

P2 Org: 11111A0 - OTHER GOV'T AGENCY Set P2 Org

Prefix Code for Change Requests:

Time Zone: (GMT -05:00) Eastern Time (US & Canada), Bogota, Indiana (East), Lima, Quito  Daylight Saving Time?

---

CPARS Focal Point: <Not Set>

Alternate CPARS Focal Point: <Not Set>

PD<sup>2</sup> Coordinator: <Not Set>

---

WARNING: Offices with an office type of LOCAL OFFICE or TRAINING OFFICE will be excluded from summary reports. This Office and its contracts will be EXCLUDED from all summary reports in RMS.

**Parent Office:** The office selected when adding the new office is displayed by default. However, this selection can be changed. Click on the [Select Parent office](#) button and select a different office from the [Office Lookup](#) table that is displayed.

Resident Management System

**Office Lookup**

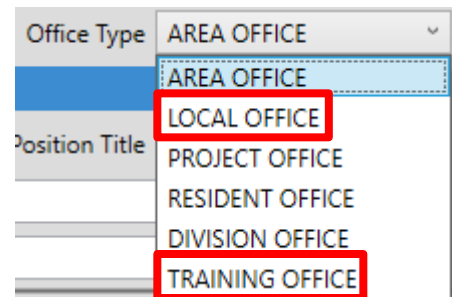
- └ AOC Project Office
- └ Detrick Integrated Program Ofc
  - └ Fort Detrick Resident Office
  - └ USAMRIID Resident Office
- └ EMDC Engineering
- └ East Campus Area Office
- └ Harrisburg Area Office
  - └ Northeastern Resident Office
- └ Baltimore \*\* TEST \*\* Area
  - └ Support Center Office
    - └ New Office
- └ Environmental Remed Res Ofc
  - └ RMS Training Office
- └ Realty Services Field Office

OK

Cancel

**Office Symbol:** The office symbol entered when adding the new office is displayed by default. To change it, retype the desired office symbol.

**Office Type:** Select the applicable office type from the drop down. Office types are determined by each District. The exception being the Training and Local office types, these offices are used to create training contracts so users can train individuals without affecting live contracts and are excluded from P2 data, CEFMS data, and Summary Reports. Otherwise, check with the District to determine which office type is applicable to the newly created office.



**Note:** Training and Local Office types are excluded from Summary Reports. So, when running reports, the data entered into a Training or Local contract will not affect data in District Reports. Also, users assigned to local or training offices will not populate in Summary reports either.

Check with the District to see which office type is applicable to the newly created office.

**Office Name:** The office name entered when adding the new office is displayed by default. To change it, retype the desired office name.

**Address Line 1, 2, 3:** Enter the office's mailing address.

**Office Manager:** Select from the Staff Member Lookup table.

**Position Title:** This field is READ ONLY. The Position Title assigned to the selected Office Manager will automatically display. See [Library Mode | RMS Staff](#).

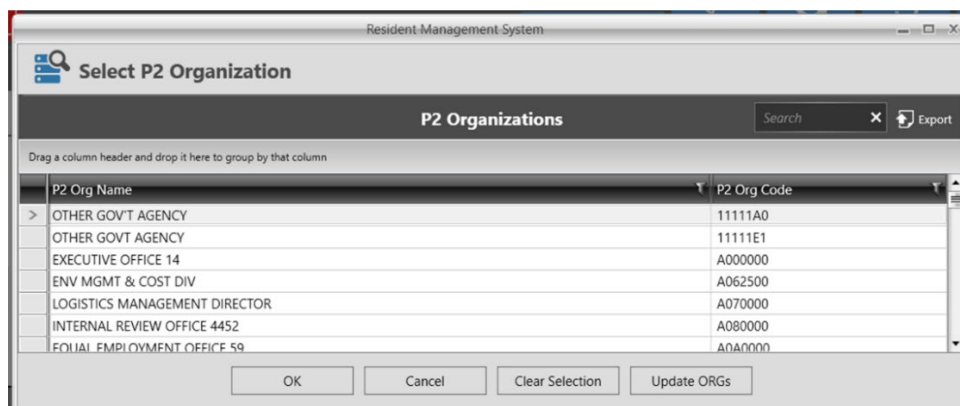
**Office Phone:** Enter the phone number at which this office can be contacted.

**Office Fax:** Enter the phone number to which facsimile transmittals can be sent.

**Office Latitude, Office Longitude:** Enter the GPS coordinates for the office, if known. The location need not be exact, an estimated location is sufficient. Otherwise use the [Select location on map](#) button to set an approximate location. This information is for RMS GIS display purposes only and is currently not in use.

**P2 Org Code:** Select the CEFMS Org Code assigned to the office from the *P2 Organization* lookup table. This is the code that links the office to the CEFMS and P2 databases for the purpose of associating financial transactions with the appropriate office.

**Note:** This is a very important selection for ensuring placement credit is assigned to the correct office.



**Prefix Code for Change Requests:** Enter the prefix used by the office when numbering change requests. The prefix can be up to 4 characters long.

**Time Zone:** Select the time zone from the drop down in which the office is located.

**Daylight Saving Time:** Check this box if the office observes Daylight Savings Time when in effect.

**CPARS Focal Point:** Select the person from the *Staff Member Lookup* table who performs the duties of the Focal Point in CPARS.

**Alternate CPARS Focal Point:** Not used, leave blank.

**PD2 Coordinator:** Select the person from the *Staff Member Lookup* table who is performs the duties of the PD2 Coordinator.

Click on the **BACK** button when done to return to the *Local Office* menu.

### 3.1.3 Office Policy

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive

**Office Policy**

**Quality Assurance Daily Reports**

QAR Lock Policy: Only allow editing of daily reports created within X days of the most recently completed QA Daily Report

Allow edit of QAR created within  days

- Only allow editing of the most recently completed QA Daily Report
- Only allow editing of daily reports created within X days of the most recently completed QA Daily Report
- Allow editing of any completed QA Daily Report

Select a policy option that applies to the preparation of QA Daily Reports in the office.

This policy does not apply to the Contractor's QC Daily Report (QCR). Once a QCR is marked completed it moves from RMS/CM to RMS/GM. The Contractor will only be able to modify the report if the Government specifically returns a QCR for correction.

Click on the **BACK** button when done to return to the *Local Office* menu.

**Note:** If something is wrong with a report, and it has been marked completed, the proper way to make a correction is to enter a narrative comment (either in the QA or QC Daily Report) in a subsequent report and explain the error or correction to a previous day's report. Once a report is completed and signed, it should not be altered.

### 3.1.4 Office Documents

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive

This module is used to store standard documents and templates that may be used by the office.

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

Add
Edit
Delete
**Office Documents**
Search  Export

Generate Document in header and drop it here to group by that column  
Add Attachment

>	Document Title	Document Status
>	04/07/2021	Document Not Attached
>	04/07/2021 RMS Data Dictionary.pdf	Document Attached
>	01/21/2022	Document Attached
>	12/12/2022	Document Not Attached
>	04/27/2020 Report2.pdf	Document Attached
>	12/13/2022	Document Not Attached
>	12/13/2022	Document Not Attached

To add a document, click on the *Add* button and select to either generate a document by selecting a contract’s Word template (*Generate Document*) or add an attachment from the user’s local file system (*Add Attachment*). Once a document has been added, the *Edit Document*, *View Document*, and *Remove Document* buttons will become enabled for use.

Office Documents - T2 Baltimore Test District

Title

Completed  Not Completed

Document Dated

Brief Summary

Select a document from the local file system.

Generate Document

Select Document

Edit Document

View Document

Remove Document

Select Word template from a Contract.

Use these buttons to *Edit*, *View*, and/or *Remove* the document once it has been added.

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

### 3.1.5 Mod Routing Slip

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive



**Mod Routing Slip**

---

**Routing for Mods Signed by ACO**

Enter routing stops for ACO mods. Enter one routing stop per line. These will be printed on the mod routing slip for mods at this office.

ACO Routing Notes

---

**Routing for Mods Signed by CO**

Enter routing stops for CO mods. Enter one routing stop per line. These will be printed on the mod routing slip for mods at this office.

CO Routing Notes

Enter the applicable routing stops for each Mod Type. Print the slip and attach to the Mod Package. See [Contract Reports / Finance](#).

Click on the [Back](#) button when done to return to the [Local Office](#) menu.

### 3.1.6 Interface Schedules

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive



**Interface Schedules**

---

Import times are based on system availability.

**Import Finances from CEFMS**

---

CEFMS Import Time

**Import Projects from P2**

---

P2 Import Time

The scheduled times for imports from CEFMS and P2 are shown here. However, the imports do not actually take place at these times. The imports will launch sometime after these times and are dependent on the schedules of all other Corps offices. Imports run only one office at a time. The information displayed on this screen is READ ONLY.

**Note:** The local time shown reflects the time of the logged in computer, not necessarily of the selected District.

**Note:** The times used are UTC or Universal Time Coordinated. It is also known as "Z time" or "Zulu Time".

Click on the [Back](#) button to return to the [Local Office Menu](#).

### 3.1.7 Office User Entries

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive

**User defined macros**

Office User Entries

Drag a column header and drop it here to group by that column.

Description of Macro	Entry
> Letterhead Address Line 1	10 S. Howard Street
Letterhead Address Line 2	P.O. Box 1715
Letterhead Address Line 3	Baltimore, MD 21203-1715
Letterhead Title/Name of Office	Baltimore District Office
Reply to Attention Default For Letterhead	CENAB-CO

Enter requested information.

Enter the information corresponding to the listed macros. It is important to correctly enter all of this information because it is used to complete documents generated using the [Word Templates](#) from the [District Library](#).

The macros are defined in [District Library | User Defined Macros](#). Click on the [BACK](#) button when done to return to the [Local Office Menu](#).

### 3.1.8 Local Office Milestones

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive

A milestone is a specific point in time within a project lifecycle used to measure the progress of a project. Milestones have a fixed date but no duration and serve as progress markers. Milestones can indicate upcoming deadlines for anything related to the project, such as a project's start or end date, deadlines, submission of a major deliverable, and other fixed points in time that need calling out. Milestones can be used to monitor and track the progress of a schedule in real time.

In RMS, there are several levels of milestones:

- [All Events](#) — A complete list of all milestone events.
- [Contract](#) — Only applicable to the contract in which the milestone is added/created. See Government Manual Volume 3 Section 9.2 [Milestone Schedule](#).
- [Local](#) — Applicable to all contracts within an office, managed by the Office Administrator.
- [District](#) — Applicable to all contracts within all offices in a District, managed by the District Administrator. See section 3.3.11 [District Milestones](#).
- [System](#) — Applicable to all contracts Corps-wide, managed by HQUSACE. In addition, milestones are categorized by phase:
  - [Design](#) — Events that occur prior to Contract Award.
  - [Construction](#) — Events that occur after Contract Award and prior to the Contract Completion Date.
  - [Post Construction](#) — Events that occur after the Contract Completion Date.

The list of milestones corresponding to any of the categories can be seen by simply clicking on the number in the blue tile. A filtered list of the category selected will be displayed in the table below the tiles.

The [Add](#) options provides two ways to create a new Local Milestone. Users can either add a new local milestone or to copy a milestone from another office.

### Copy a Milestone from Another Office:

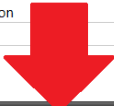
Choose [Copy From Other Office](#) to copy a milestone. Next, select the office that holds the milestone, and choose [Next](#).

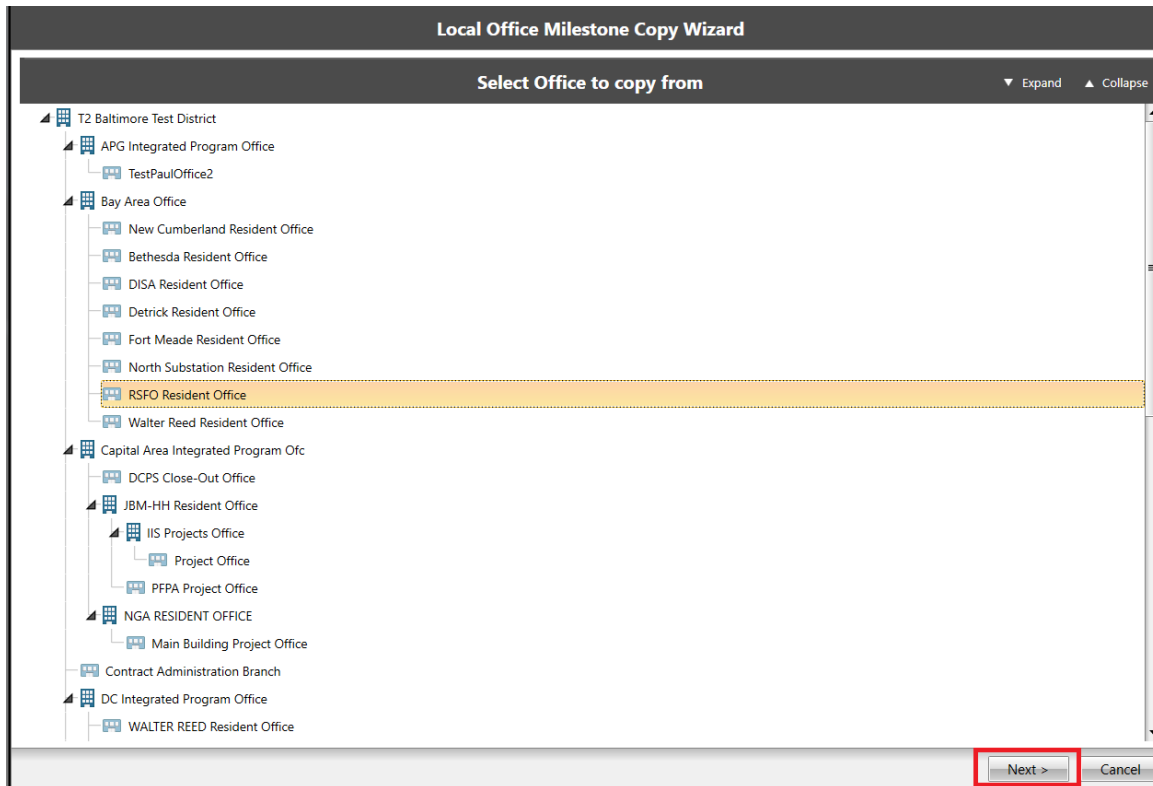
**Local Office Milestones - Jenn's Office**

All Events <b>20</b>	Design <b>5</b>	Construction <b>6</b>	Post Construction <b>9</b>	System <b>13</b>	District <b>7</b>	Local Office <b>0</b>
-------------------------	--------------------	--------------------------	-------------------------------	---------------------	----------------------	--------------------------

Add
Edit
Delete
All Events  Export

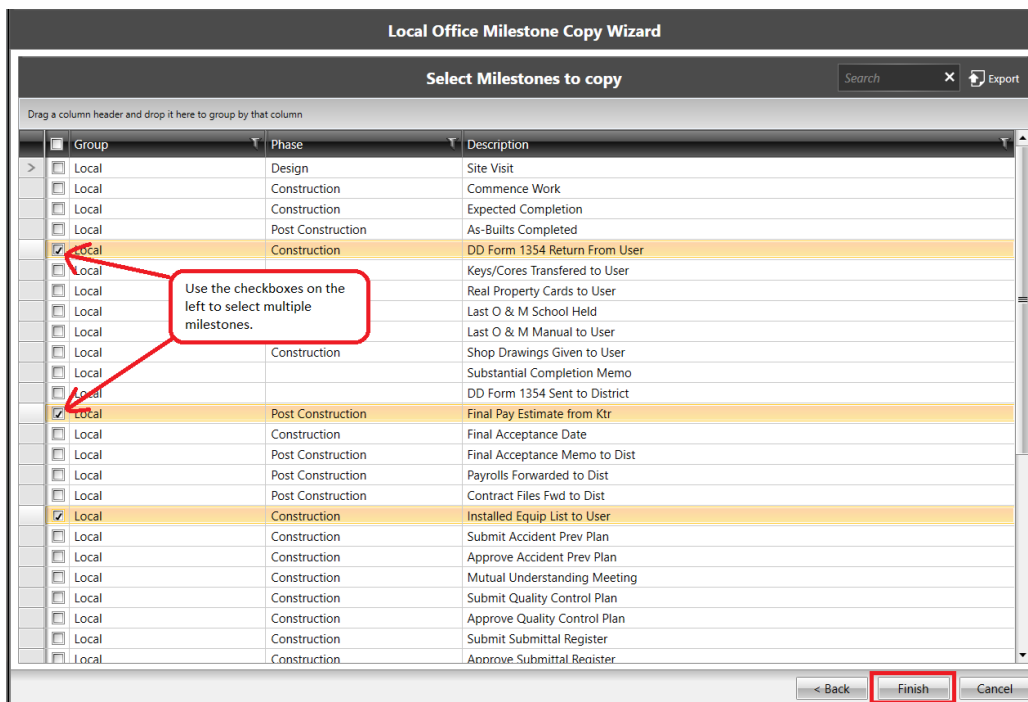
Add New Milestone	Group	Phase	Milestone Event	Record Time	Always Add	Allow Delete	Allow NA	Order No.
Copy From Other Office								
>	System	Construction	Red Zone Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
	System	Post Construction	Project Fiscal Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8
	System	Construction	Contract Award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13
	System	Post Construction	Beneficial Occupancy Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18
	System	Post Construction	Contract Physical Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23
	System	Post Construction	Contractor Final Payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28
	System	Construction	Construction Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
	System	Post Construction	Transfer Document Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38
	System	Construction	Contract Required Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	43
	System	Post Construction	AE Evaluation Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	48





Next, select all milestones that are to be copied to the new District.

If more than one milestone is to be selected, use the checkboxes to the left of the milestones to select multiple milestones. When all desired milestones are selected, click *Finish*.



**Add a New Local Milestone:**

Choose *Add new Milestone* to create a new milestone.

**Local Office Milestones - Jenn's Office**

All Events	Design	Construction	Post Construction	System	District	Local Office
20	5	6	9	13	7	0

Add Edit Delete **All Events** Search Export

Group	Phase	Milestone Event	Record Time	Always Add	Allow Delete	Allow NA	Order No.
> System	Construction	Red Zone Meeting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
System	Post Construction	Project Fiscal Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8
System	Construction	Contract Award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13
System	Post Construction	Beneficial Occupancy Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	18
System	Post Construction	Contract Physical Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	23
System	Post Construction	Contractor Final Payment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	28
System	Construction	Construction Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	33
System	Post Construction	Transfer Document Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	38
System	Construction	Contract Required Completion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	43
System	Post Construction	AE Evaluation Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	48



**Add Local Office Milestone Event**

The following information is required to add a new Local Office Milestone Event

Description:

Enter a name for the new milestone, then click *OK*.



**Edit Local Milestone**

**Event**

Group: Local

Phase: Design

Description: New Local Milestone-1

Order No.: 1042

Record Event Time  
 Add to New Contracts?  
 Allow Deletion from Contract  
 Allow Date Not Required

**Base Scheduled Event Date On**

Manually Entered Date  
 Other Milestone Event  ± 0 days

**Add to Selected Contracts**

Select Contracts...

For RMS Support Only:

Uncheck this box to bypass the normal Milestone Update process

*Group*. The default group is Local. This entry cannot be changed.

**Phase.** Select the applicable phase from the drop-down list: Design, Construction, or Post-Construction.

**Description.** The milestone name previously entered when adding the milestone, displays, but may be changed here.

**Order No.** Sets the order in which the milestone appears in the list of milestones. The number will default to the next number in sequence after the current last number but may be changed.

**Recommendation:** Set the order number according to the order in which the milestone should occur relative to all other milestones as the project/contract progresses. This may take several tries to place it in the right order.

**Record Event Time.** Check this box to enable recording the time that the event is held. This is not a required entry.

**Add to New Contracts?** Check this box to add the milestone to new contracts only. When the box is not checked, the new milestone is added to all existing contracts also.

**Note:** Leaving the box unchecked is useful when a new milestone is required that must be included in contracts that are already underway. The new milestone will be inserted into all the office's existing contracts.

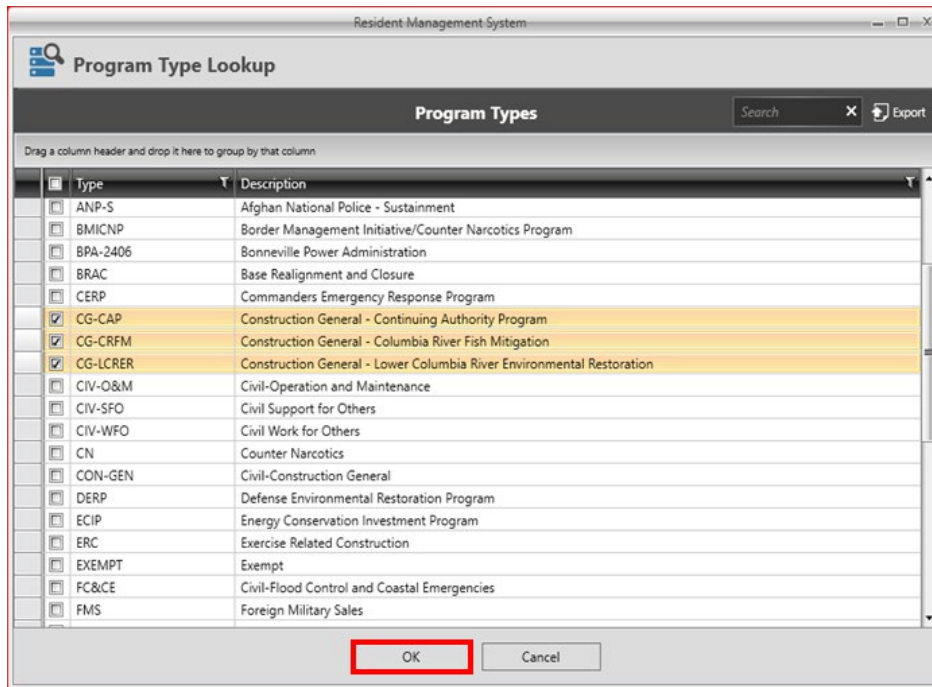
**Allow Deletion from Contract.** Check this box to allow any user with write access to **Schedules | Milestone Schedule** to delete the milestone.

**Allow Date not required.** Check this box to allow any user with write access to Schedules | Milestone Schedule to check the **Milestone Date not Required** box. See Government Manual Volume 3 Section 9.2 **Milestone Schedule**

**Manually Entered Date.** Select this option to enter an exact date on which the Milestone must occur.

**Other Milestone Event.** Select this option to link the occurrence of the milestone to that of another milestone. Click on **Select Milestone** and select from the list shown. Enter a number in the **+ days** field to specify the number of days before (-) or after (+) the selected milestone that the new milestone occurs.

**Add to Selected Contracts.** Use this selection to limit the application of the milestone to contracts of selected program types. Select all applicable programs from the **Program Type Lookup** table, then click on **OK**.



Click on the [BACK](#) button when done.

To delete a milestone, click on [Delete](#). Only Local milestones can be deleted here. This action will remove the milestone from the library but will not affect any contracts that have the milestone already included.

Then click on the [BACK](#) button again to return to the [Local Office Menu](#).

### 3.1.9 Local Office Contract Archive

There are times that District Administrators wish to archive contracts after completion. Those contracts can also be managed in the [District Office | Archived Contracts](#) module by District Administrators.

However, this allows Office Administrators to access archived contracts if the correct permissions have been set up by the District Administrator are assigned. The process of archiving and unarchiving contracts is the same and can be viewed in the [District Office | Archived Contracts](#) module.

Office Description	Office Policy	Office Documents	Mod Routing Slip
Interface Schedules	Office User Entries	Local Office Milestones	Local Office Contract Archive

## 3.2 District Office

**T2 Baltimore Test District**  
56 Offices, 1,810 Staff, 1,127 Contracts

Government Mode Home | Back | Refresh | Log Out | Help

Local Office | **District Office** | District Library | System Library | Summary Reports | RMS GIS | User Settings | RMS Mobile | RMS Staff

T2 Baltimore Test District (including suboffices) ...	Favorites	Recent
All Contracts 1,123	E1000183 Design/Build Fire Station	E1000183 Design/Build Fire Station
Future Contracts 214	DACA31-01-C-0039	DACA31-01-C-0039
Awarded Contracts - Construction Not Complete 318		E1001660 Wideband Satellite Communications Center
Awarded Contracts - Final Payment Not Made 460		W912DR-11-C-0033 W9123820F0130
Construction Complete - Not Physical Complete 32		E1000214 *** TEST ***
Construction Complete - Final Payment Not Made 142		W911XK20C0017
Final Payment Made - Not Fiscal Complete 226		E1000065 UNDERGROUND TANK UPGRADE
Fiscal Complete Contracts 223		DACA31-95-D-0083

**District Office Menu**

**RMS District Office**  
The RMS District Office contains the items maintained by the District Office. This provides uniformity of field offices in areas considered appropriate.

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		

Open this menu to view and manage information affecting all the offices in the District. Only District Administrators can edit data in these modules.

The **District Office** menu consists of:

**District Office:** Store office logistics, such as address, phone, location, etc.

**Position Titles:** Manage the Position Titles for use in the District's offices.

**Contract User Roles:** Define the type and extent of access to RMS/GM modules.

**District Policy:** Set District-wide rules for calculating placement, and various mod and submittal actions.

**Prime Contractors:** Manage the list of all Prime Contractors that have or have had contracts in the District.

**FY Baseline Placement:** Manage the District's Baseline and Midyear Placement projections.

**Dredge Names:** Enter the names of dredges used in the District, Contractor, and Government (not used at this time).

**Archived Contracts:** Manage archived contracts in the District's offices.

**Contract Security Classification:** Manage Contract Security Classification for contracts

within the District.

**Unlock Progress Payment:** View and/or remove the District's current locks on Progress Payments.

### 3.2.1 District Office

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



**District Office - District Office**

Parent Office:

Office Symbol:  Office Type:

Office Name:  Office Manager:

Office Address - Line 1:  Position Title:

Office Address - Line 2:  Office Phone:

Office Address - Line 3:  Office Fax:

Latitude:  Longitude:

**Submittal with Review Office designated as 'DO' should be sent to the following District Office Location**

DO Submittals - Office:

DO Submittals - Address Line 1:

DO Submittals - Address Line 2:

DO Submittals - Address Line 3:

**Parent Office.** Set automatically by RMS for every District. This information is hard-coded in.  
**Office Symbol.** Set automatically by RMS for every District. This information is hard-coded in.  
**Office Type.** Set automatically by RMS for every District. This information is hard-coded in.

**Office Name.** Set automatically by RMS for every District. This information is hard-coded in.

**Office Address—Line 1, 2, 3.** Enter the office's mailing address.

**Office Manager.** Select from the Staff Member Lookup table.

**Position Title:** This field is READ ONLY. The Position Title assigned to the selected Office Manager will automatically display. See [Library Mode | RMS Staff](#).

**Office Phone:** Enter the number at which this office can be contacted.

**Office Fax:** Enter the number to which facsimile transmittals can be sent.

**Latitude, Longitude.** Enter the GPS coordinates for the office, if known. The location need not be exact, an estimated location is sufficient. Otherwise use the [Select location on map](#) button to set an approximate location. This information is for RMS GIS display purposes only and is

not in use at this time.

*Submission with Review Office designated as 'DO'*. Enter the name and address of the office assigned to review submittals tagged with the 'DO' review responsibility.

Click on the [Back](#) button when done to return to the [District Office](#) menu.

### 3.2.2 Position Titles

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



Add Edit Delete
District Office - Position Titles
Search X Export

Drag a column header and drop it here to group by that column

Position Title
Acquisition Support Specialist
Administrative Assistant
Administrative Contracting Officer
Administrative Specialist
Administrative Support Clerk
Architect

**Edit Position Titles -**

Position Title



Click on [Add](#) to enter a title. Enter the title, then click on the [Back](#) button.

Continue to [Add](#), [Edit](#) or [Delete](#). When done, click on the [Back](#) button again to return to the [District Office Menu](#).

### 3.2.3 Contract User Roles

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



Contract User Roles are used to identify the areas within RMS to which an individual has access and the extent of the access allowed. Contract User Roles are specific to the office in which the

user is assigned. If the user has duties in more than one office, a different role may be assigned in each office. The District or Office Administrator manages the assignment of Contract User Roles.

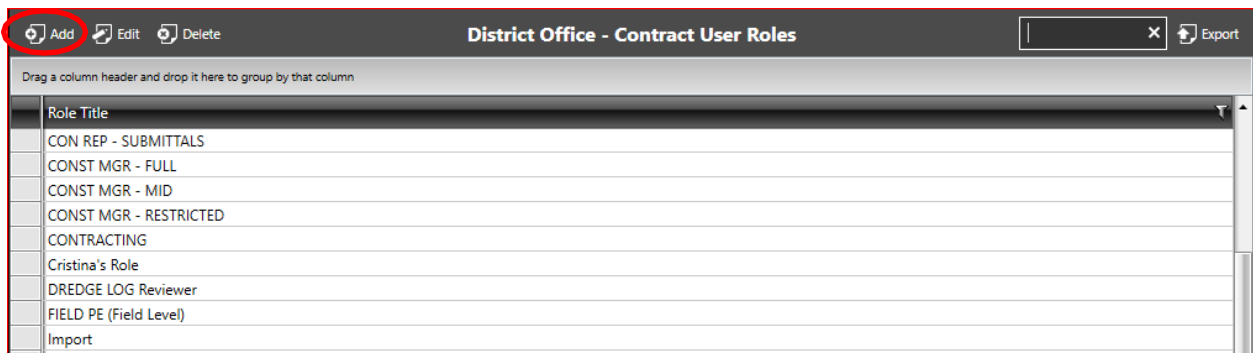
Individuals identified as an Administrator need not be assigned any other role. However, all other staff members must be assigned a User Role. There is no limit to the number of roles that can be added to the Contract User Roles library.

This is a shareable item in [System Library | RMS Asset Store](#).

### 3.2.2.1 Add/Edit a Role

Click on [Add](#), enter a title to be associated with that role, then select the level of access for each of the permission types.

**Recommendation:** Assign titles that are somewhat descriptive of the function that User Role will have in the office.



There are 3 levels from which to choose:

- No access—The user has no access to the data. Data cannot be seen or edited.
- Read Only access—The user can see the data but cannot edit the data.
- Read/Write access—The user has unlimited access to the data, including edit capability.

Assigning a single access level to all areas is simplified by using one of the buttons at the top. Otherwise, accessibility can be customized for each User Role that is created. Click on the down arrow in each selection box and pick the desired level of access for that User Role. Access levels to the various areas in RMS may be assigned in any combination.

Once the level of access is selected, accessibility is also graphically identified by a yellow or green checkmark or a red X.

3 Phase Inspections	Read Only Access	✓
Hazard Analysis	Read & Write Access	✓
QC Requirements	No Access	✗

**User Role**

Role Title: ADMINISTRATIVE

Buttons: Assign all as No Access, Assign all as Read-Only, Assign all as Read/Write

**Administration - Permissions**

- Contract Description - General information defining contract: Read & Write Access ✓
- Contract Description - Location/Coordinates: Read & Write Access ✓
- Contract Status - Status/Issues: Read & Write Access ✓
- Monthly Progress: Read & Write Access ✓
- Contract Personnel: Read & Write Access ✓
- Contract File (Contract Documents): Read & Write Access ✓
- Contract Setup / Action Items: Read & Write Access ✓
- Contract Setup / Security Classification: No Access ✗
- P2 Projects: Read & Write Access ✓
- Correspondence - Prepare/Draft correspondence: Read & Write Access ✓
- Correspondence - Approve outgoing correspondence: Read & Write Access ✓
- Request for Information - Prepare/Draft RFI response: Read & Write Access ✓
- Request for Information - Approve RFI response: Read & Write Access ✓
- User Defined Entries - Enter defined information: Read & Write Access ✓
- Prime Contractor / Contractor Staff: Read & Write Access ✓
- Subcontractors: Read & Write Access ✓
- Contractor Insurance: Read & Write Access ✓
- Contractor Payrolls: No Access ✗
- Contractor Labor Interviews - Resolve outstanding violations: No Access ✗
- Contractors On Site: No Access ✗

**Finances - Permissions**

- Future Contract - Enter Estimated Contract amount prior to Award: Read Only Access ✓
- CEFMS Finances: Read & Write Access ✓
- Recompute Finances: Read & Write Access ✓
- Current CLINs - Review current Contract Line Items: Read Only Access ✓
- Pay Activities - Import/Enter Contractor Pay Activities: Read & Write Access ✓
- Progress Payments - Enter Requested/Allowed Activity Earnings: Read & Write Access ✓
- Progress Payments - Complete Payment: Read & Write Access ✓
- Progress Payments - Send to CEFMS: Read & Write Access ✓
- Contract Changes - Prepare Contract Change Request: Read & Write Access ✓
- Contract Changes - Fund Contract Change Request: Read & Write Access ✓
- Contract Modifications - Prepare SF30: Read & Write Access ✓
- Contract Modifications - Obligate and release Modification: Read & Write Access ✓
- Contractor Claims: Read & Write Access ✓

**Import/Export - Permissions**

- Submittal Register - Import Submittal Register from SpecIntact/Excel: Read & Write Access ✓
- Import From Another Contract / Import MICA: Read Only Access ✓
- Excel Mods List: Read & Write Access ✓
- NAS (SDEF) - Import Contractor Schedule: Read & Write Access ✓
- NAS(SDEF) - Import Contractor Pay Request: Read & Write Access ✓

### 3.2.2.2 Delete a Role

Select the role to be deleted, then click on *Delete*.

**User Roles** | Linked Staff

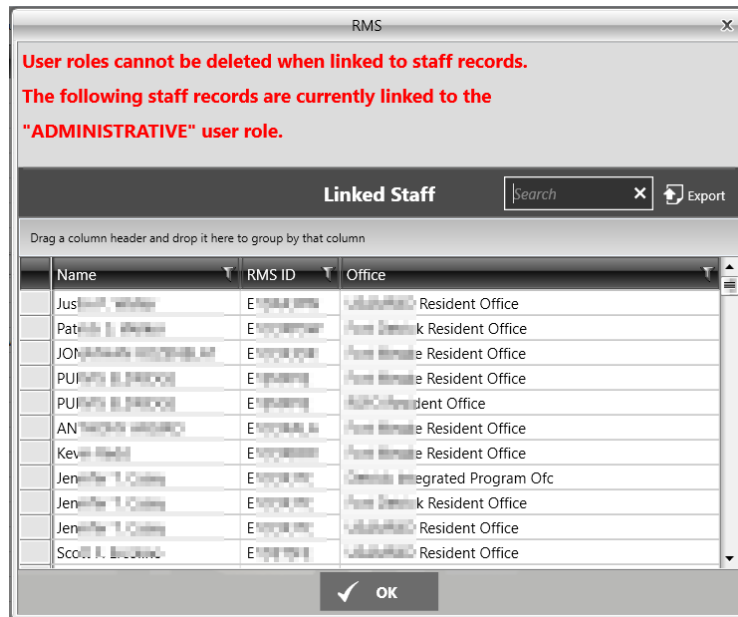
Buttons: Add, Edit, Delete (circled in red)

**District Office - Contract User Roles**

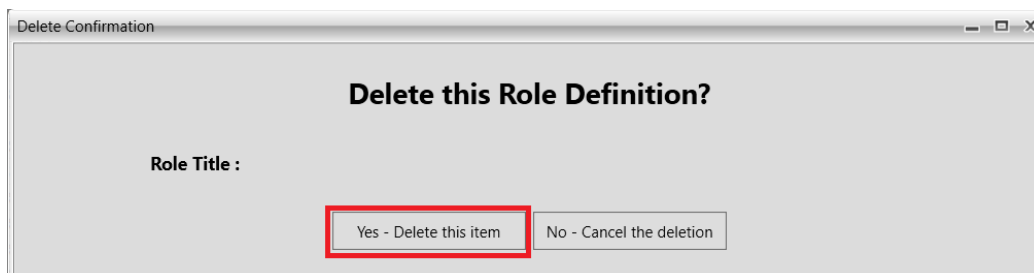
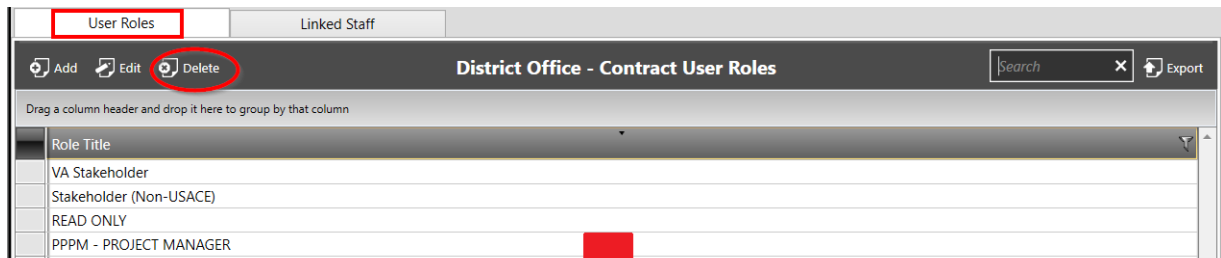
Drag a column header and drop it here to group by that column

Role Title
VA Stakeholder
Stakeholder (Non-USACE)
READ ONLY
PPPM - PROJECT MANAGER

If there are staff assigned to that role, that role cannot be deleted. Instead, a warning will be displayed listing the staff assigned to that role. Before the role can be deleted, all affected user(s) must be reassigned to a different role. See RMS Support Staff for assistance.



After reassigning affected staff to another role, select the role to delete, click on [Delete](#), then confirm the deletion.



Click on the [Back](#) button to return to the [District Office](#) menu.

### 3.2.2.3 Linked Staff

To keep track of which user is assigned which role, the [Linked Staff](#) tab is provided for a quick glance at who and how many users are assigned to a specific role. To view the users linked to a [User Role](#), click on the [Linked Staff](#) tab in the [Contract User Roles](#) module.

By default, this view is sorted by User Role. To view who is linked to a specific user role, click on the down arrow to the left of the User Role in the list. For other options related to this view, please see the image below.

### 3.2.4 District Policy

The District Administrator uses this module to establish default settings that are applied to the contracts in all offices under its jurisdiction. Values entered here, automatically populate in all new contracts. However, users still can change the selections/numbers applied in a contract if needed.

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



There are policies for 3 areas separated by tabs:

- District Policy
- Mod Policy
- Submittal Policy

Click on the associated tab(s) to enter *District*, *Mod*, and *Submittal* policies.

The District Policy view allows users to setup RMS with options that apply to all contracts for the District. In this way, the District can be consistent among field offices.

The option to include accruals in Monthly Placement is a key setting that changes how RMS deals with accruals in reports. When this setting is checked, Summary and Contract Reports will include accruals in the calculations. But if this setting is unchecked, accruals will be ignored in reports.

**Note:** Accruals are automated in CEFMS and downloaded into RMS. The accrual balances are available on the Earnings tab in Payments to use in funding a Progress Payment. When submitting payments to CEFMS, the accruals are automatically applied.

In the next section, the way Monthly Progress is calculated can be set. Monthly Progress can be calculated based on Progress Payments, Earnings, or the user can manually enter the values.

The default Number of SF30 Copies for each type of Mod can also be set. Finally, the Small Business Contracting Goal percentage for the District can be set.

On the next tab, defaults for the Mod Policy of the District can be set.

**District Policy**

District Policy    Mod Policy    Submittal Policy

Modification Required Completion  Days after inception

Basic Change Document Required by Default

Plans Required by Default      Plans - Days due after requested

Specifications Required by Default      Specs - Days due after requested

Government Estimate Required by Default      Estimate - Days due after requested

Contractor Proposal Required by Default      Proposal - Days due after requested

Negotiations Required by Default

---

Contractor signature required: A-Administrative      Days due after sent to Contractor: A-Administrative

Contractor signature required: B-Bilateral      Days due after sent to Contractor: B-Bilateral

Contractor signature required: S-Supplemental      Days due after sent to Contractor: S-Supplemental

Contractor signature required: T-Change Order      Days due after sent to Contractor: T-Change Order

Contractor signature required: U-Unilateral      Days due after sent to Contractor: U-Unilateral

Requirements of the Mod sections are set here and will initially appear this way with new additions within all contracts. These appear in the Change Requests, Status/Funding tab. These defaults can be changed within the Change Request.

The third tab has default settings for Submittals.

**District Policy**

District Policy    Mod Policy    Submittal Policy

**District Submittal Defaults - For default submittal settings on New Contracts**

Government Review Period (days)					
GA Review Period	FIO Review Period	CR Review Period	DA Review Period	DACR Review Period	DAGA Review Period
<input type="text" value="1"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>	<input type="text" value="5"/>	<input type="text" value="6"/>

Contractor Resubmittal Period

Default Number of Copies					
GA Copies	FIO Copies	CR Copies	DA Copies	DACR Copies	DAGA copies
<input type="text" value="8"/>	<input type="text" value="9"/>	<input type="text" value="10"/>	<input type="text" value="11"/>	<input type="text" value="12"/>	<input type="text" value="13"/>

The Government Review Period and number of copies of different Submittal Types can be set here.

Enter the default values for *Government Review Period (days)* and *Default Number of Copies*. These should be the same as the values found in typical Submittal Procedures in specification section 01 33 00 found in the contract. Set the values that are most often used. A contract's settings can still be edited whenever its specifications have different requirements.

### 3.2.5 Prime Contractors

District Office	Position Titles	Contract User Roles	District Policy
<b>Prime Contractors</b>	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



This module contains the list of all Prime Contractors that currently have or have had contracts in the District. Prime Contractors are uniquely identified by its Unique Entity Identifier (UEI) number. The UEI number allows RMS to automatically add Prime Contractors to the list from a contract or add it here in this module. For a Prime Contractor to be assigned to a contract in RMS, there must be an entry for that Contractor listed here with an Administrator identified.

Click on [Add](#) to add a new Prime Contractor.

Prime Contractor ID	Contractor Name	UEI No	Cage Code	City	State
E1000011	ALSOW Technologies	867530999999		Rockville	MD
E1000012	Akima	123423143333		Charlotte	NC
E1000190	Akima	109481471384		Charlotte	NC
E1000014	Alan Smallwood Excav	231423143333		Butler	Pennsylvania



RMS Add View

#### Add Prime Contractor

The following information is required to add a new Prime Contractor

Name of the Prime Contractor



**Prime Contractor - Testing**

---

**Prime Contractor Information**

Prime Contractor ID	<input type="text" value="E1000194"/>	UEI No	<input style="border: 1px solid red;" type="text"/>
Contractor Short Name	<input type="text" value="Testing"/>	NAICS Code	<input style="border: 1px solid yellow;" type="text"/>
Full Name	<input type="text"/>	Cage Code	<input type="text"/>
		DUNS	<input type="text"/>

---

**Home Office Address**

Street Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
County	<input type="text"/>
Home Office Phone	<input type="text"/>
Zip Code	<input type="text"/>
Country	<input type="text"/>
Home Office Fax	<input type="text"/>

WARNING: There are no administrators setup for this prime contractor. Each Prime Contractor should have at least one administrator.

Contractor Staff
Contracts

Add Edit Delete
**Contractor Staff**
Search 
Export

Drag a column header and drop it here to group by that column

Name	Account ID (email)	Admin	Linked	Last Logged In	Inactive	Deleted

Above is the view users will see when adding the Prime Contractor to the District office.

**Prime Contractor ID:** This is a unique identifier sequentially numbered by RMS automatically. The first two characters represent the office's CEFMS code.

**UEI No:** The Federal Government has transitioned from the use of the DUNS Number to the Unique Entity Identifier (UEI) as the primary means of entity identification for Federal Awards Government-wide. UEIs are required in accordance with [2 CFR Part 25](#), and the transition from DUNS to UEI has resulted in the UEI being issued by the Federal Government in SAM.gov. The UEI is a unique 12-character identifier generated and owned by the Government. For a Contractor to be awarded a Government contract, the Contractor must have a UEI Number. The UEI number can be found on the Sam.gov website, <https://sam.gov/content/duns-uei>. This is a mandatory entry.

**NAICS Code:** The North American Industry Classification System (NAICS) is the standard used by Federal Statistical Agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. This information can usually be found in the solicitation. A business may be registered with more than one NAICS code. This is not a required entry.

**Contractor Short Name:** The Contractor Short Name is the abbreviated name of the Contractor, limited to thirty-six (36) characters. It is used in many reports and calendars where space is limited.

**Cage Code:** The Commercial and Government Entity (CAGE) Code is a five-character identifier for companies doing business with the Federal Government. It can be found in Block 14 on page 2 of the SF1442 Award document. This is not a required entry.

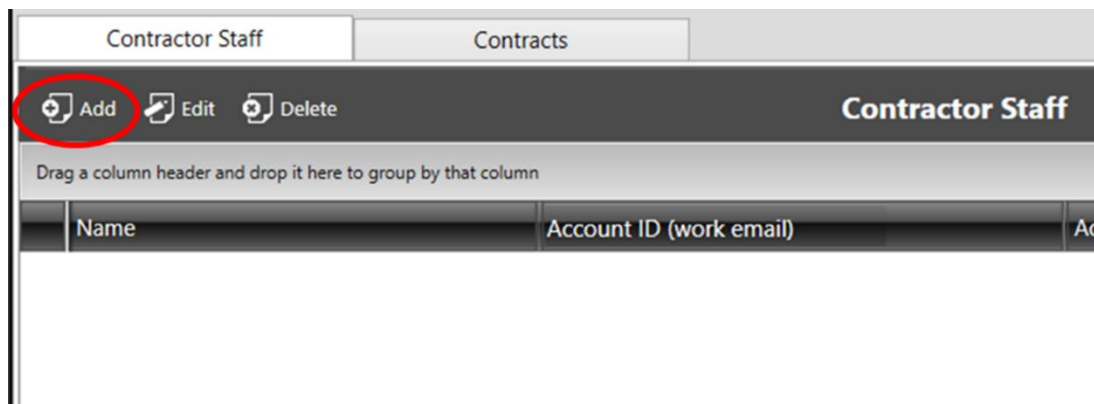
**Full Name:** Enter the Prime Contractor's full name as found in Block 14 on page 2 of the SF1442 Award document. This field is limited to 60 characters.

**Home Office Address:** Enter the Prime Contractor's address as found in Block 14 on page 2 of the SF1442 Award document.

**Warning:** This warning will display when an Administrator for the Contractor has not yet been added to RMS. The Contractor's Administrator is the person responsible for managing the Contractor's Staff and contracts in RMS. The Administrator must be the first person added to the Contractor Staff list. This must be done by the Government's District Administrator. The Contractor will not be able to access his contract in RMS until its Administrator has been added to the system.

### 3.2.4.1 Contractor Staff Tab

Click on [Add](#) to add an Administrator to the Contractor Staff list. For a Government user to access RMS/CM, he/she must also be included in the Contractor Staff. This can be done by the Government's District Administrator or the Contractor's Administrator.



**Recommendation:** Limit Government user access to RMS/CM. Allow only when necessary to view the Contractor's data when the Contractor cannot figure out what to do next. Only allow READ access to prevent accidental or purposeful tampering with Contractor data. However, it may sometimes be helpful for the Government's District Administrator to have FULL access to assist the Contractor when time-sensitive issues arise. Use this permission sparingly.

Click on the [Back](#) button three times when done to return to the [District Office](#) menu or once to return to the Prime Contractor module.

The newly added person is now listed in the **Contractor Staff** tab as an Administrator. After this user has logged in, the **Linked to Login Account** status will change to **Yes**.

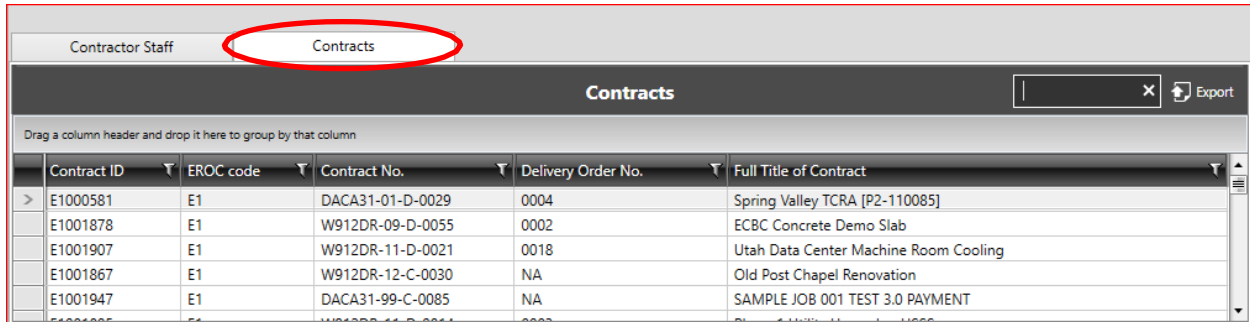
Name	Account ID (work email)	Admin	Linked
> User, Test	test@rmssupport.com	Yes	Yes

Pictured above is what users will see that indicates that a contractor has successfully logged in to the contract.

### 3.2.4.2 Contracts Tab

Open this tab to see all the contracts linked to the selected Prime Contractor. This is a READ ONLY screen.

Click on the [Back](#) button twice when done to return to the [District Office](#) menu.



Contract ID	EROC code	Contract No.	Delivery Order No.	Full Title of Contract
E1000581	E1	DACA31-01-D-0029	0004	Spring Valley TCRA [P2-110085]
E1001878	E1	W912DR-09-D-0055	0002	ECBC Concrete Demo Slab
E1001907	E1	W912DR-11-D-0021	0018	Utah Data Center Machine Room Cooling
E1001867	E1	W912DR-12-C-0030	NA	Old Post Chapel Renovation
E1001947	E1	DACA31-99-C-0085	NA	SAMPLE JOB 001 TEST 3.0 PAYMENT

### 3.2.6 FY Baseline Placement

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	<b>FY Baseline Placement</b>	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



This module allows District Administrators to set up a District wide baseline of yearly spending that can be applied to contracts. Creating a FY (Fiscal Year) baseline in this module will first generate a list of all projects that are active during that Fiscal Year. Those contracts are split into two tabs, which are defined [below](#). It will also give District Admins the ability to Lock or Unlock the baseline (see [below](#) for details).

The Placement data that is pulled into the Baseline calculations comes from what is entered into the [Schedules | Placement Schedule | Placement Curve](#) tab in each individual contract when the District Administrator clicks on the [Copy Placement into Baseline...](#) button within each selection in the Fiscal Year baseline.

**Placement Schedule** Graph

Placement Curve    Monthly Placement    Actual vs. Projected Placement    Actual vs. Baseline

Placement vs Projected for: FY 2020 Original Projected

Search     Export

Actual / Scheduled Placement					FY 2020 Original Projected				
Month	Monthly Placement	Total Placement	%		Monthly Baseline	Total Baseline	%	Total Difference	
> Oct 19	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Nov 19	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Dec 19	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Jan 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Feb 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Mar 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Apr 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
May 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Jun 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Jul 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Aug 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
Sep 20	■	\$0.00	\$0.00	0	\$0.00	\$0.00	0	\$0.00	
		\$0.00			\$0.00	\$0.00		\$0.00	

FY 2020 Original Projected not entered

Copy Placement to Baseline...

■ Actual Earnings                      ■ Projected earnings based on Manually Entered

Information from specific contracts can be used to update the baseline by clicking on the *Copy Placement to Baseline* button. This will also move the contracts from the *Contracts with Possible Placement* tab to the *Contracts with Projected Placement Entered* tab.

**FY 2019 Original Projected**

Baseline Unlocked      Allow B placem  
 Baseline Locked      Lock FY Baselin

The Due Date    Select a date 15

225 - Contracts with Possible Projected Placement    0 - Contracts with Projected Placement Entered

**Baseline Contracts with Possible Projected Plac**

Edit

A *Contract Baseline Due Date* must be entered before the *Baseline Locked* radio button can be selected.

The tabs list contracts that have been copied into Placement (*Contracts with Projected Placement Entered* tab) or those that have not been copied (*Contracts with Possible Placement* tab)

If the *Baseline Unlocked* option is selected, the Baseline will continuously update based on the individual Placement data entered into each individual contract. If the *Baseline Locked* option is selected, the baseline will take a snapshot and use the Individual Placement data entered in each individual contract at the time this option was clicked. This option can only be selected if a due date has been entered.

**Note:** Once the Fiscal Year Baseline Placement for a specific Fiscal Year has been created, all individual projects listed in both the *Contracts with Possible Project Placement* and *Contracts with Projected Placement* tabs will gain a new tab inside the individual contract itself. This can be accessed by opening a specific contract from that Fiscal Year then navigating to the *Schedule | Placement Schedule* module and viewing the newly added *Actual vs. Baseline* tab.

**Note:** The **Actual vs. Baseline** tab will not show up in a contract if a baseline was never created for a Fiscal Year for which that project is active. This information can also be directly entered into this tab by double clicking on any project in a Fiscal Year Baseline from either the **Contracts with Possible Project Placement** tab or the **Contracts with Projected Placement** tab.

### 3.2.7.1 Add FY Baseline

FY Baseline	Status	Projected Amount
FY 2022 Original Projected	Open - Due date not entered	\$24,040,400.00
FY 2019 Original Projected	Open - Due date not entered	\$0.00
FY 2013 Original Projected	Open - Due date not entered	\$0.00

**Add Add FY Baseline Placement Schedule**

The following information is required to add a new Add FY Baseline Placement Schedule

Fiscal Year:   Original Baseline

**FY 2022 Original Projected**

Baseline Unlocked Allow Baseline to be updated for all contract with placement for the FY Contract Baseline Due Date

Baseline Locked Lock FY Baseline schedules for all contracts in this FY Baseline

**Baseline Contracts with Possible Projected Placement**

Contract Office	Contract ID/No	Contract Title
E1000020	W912DR-09-D-0047 0009	SRF Blast Door Retro Fit Bldg 3401
E1000020	W912DR-10-D-0041 0013	Bldg 359 HVAC System Evaluation
E1000020	W912DR-10-D-0041 0016	Building 5014 Chiller Replacement & AHU
E1000020	W912DR-11-D-0024 0003	ATC Bldg 460 B Renovations
E1000020	W912DR-10-D-0041 0037	Bldg 349 HVAC System Replacement
E1000020	W912DR-11-D-0015 0001	Bldg 433 Renovations

Choose contracts to add to baseline from either the **Contracts with Possible Projected Placement** or **Contracts with Projected Placement Entered** tabs at the bottom of the add window.

**Contracts with Possible Projected Placement** are contracts that have NOT had manually entered data in the Placement Schedule.

**Contracts with Projected Placement Entered** are contracts that have had manually entered data in the Placement Schedule.

**Note:** The numbers in front of the words on these tabs are the number of contracts that fall under those categories respectively.

### 3.2.7.2 Delete FY Baseline

This option allows District Admins to remove contracts from the current Fiscal Year if those contracts are test contracts or do not apply to the District's Annual budget. Choose the Baseline that needs to be removed from the FY Baseline. Then click on the [Delete](#) button and confirm the deletion.

District FY Baselines			
FY Baseline	Status	Projected Amount	
FY 2020 Original Projected	Open - Due date not entered	\$0.00	
> FY 2013 Original Projected	Open - Due date not entered	\$0.00	
FY 2010 Original Baseline	Open - Due date not entered	\$311,212,268.51	
FY 2009 Mid Year Baseline	Open - Due date not entered	\$31,019,321.27	
FY 2009 Original Baseline	Open - Due date not entered	\$1,522,323,177.47	
FY 2008 Original Baseline	Open - Due date not entered	\$246,908,582.43	
FY 2007 Original Baseline	Open - Due date not entered	\$103,990,869.45	

**Delete this Baseline?**

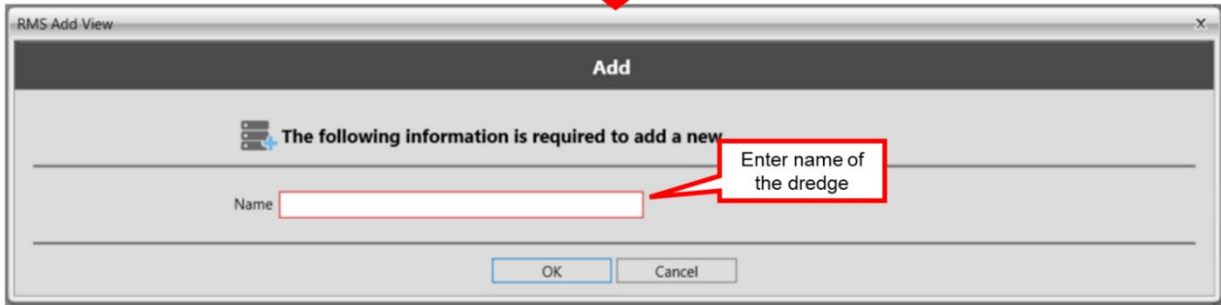
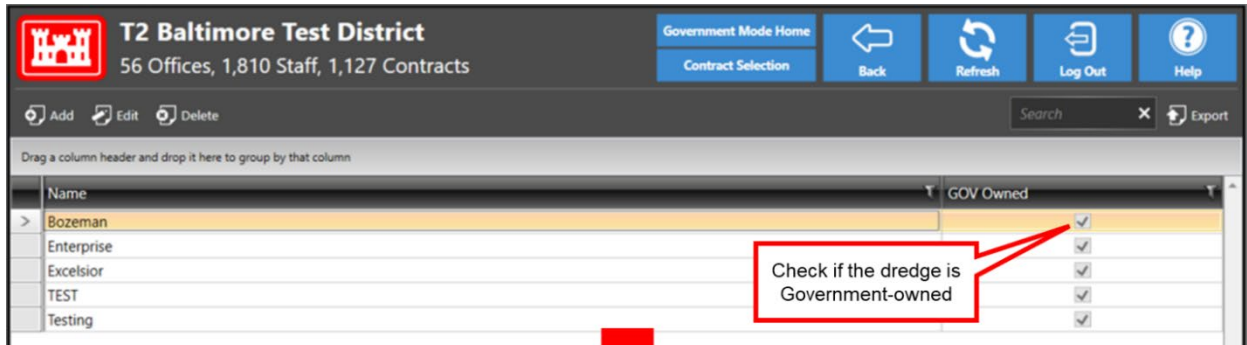
Unique Baseline ID : E1000002  
Baseline Schedule Date : 10/01/2012

Click on the [Back](#) button twice when done to return to the [District Office Menu](#).

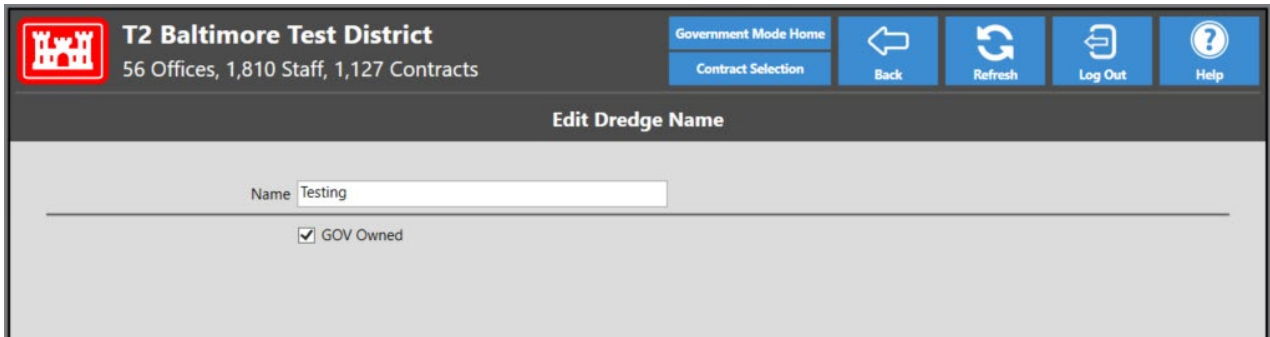
### 3.2.7 Dredge Names

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		

Click on [Add](#) to enter names of dredges used in the District. (This information is not used at this time.) Click on the [BACK](#) button when done to return to the [District Office Menu](#).



Once the Dredge Name has been entered, the screen below will appear. The Dredge Name can be edited, and the GOV Owned checkbox can be unchecked. This checkbox is checked by default.



### 3.2.8 Archived Contracts

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		



District Administrators have the ability to either archive or restore completed contracts within RMS using this module.

**Note:** If the contract was archived in RMS 2.38, it will not show in this list. In order to restore contracts that were archived in RMS 2.38, contact the RMS Support Center for assistance.

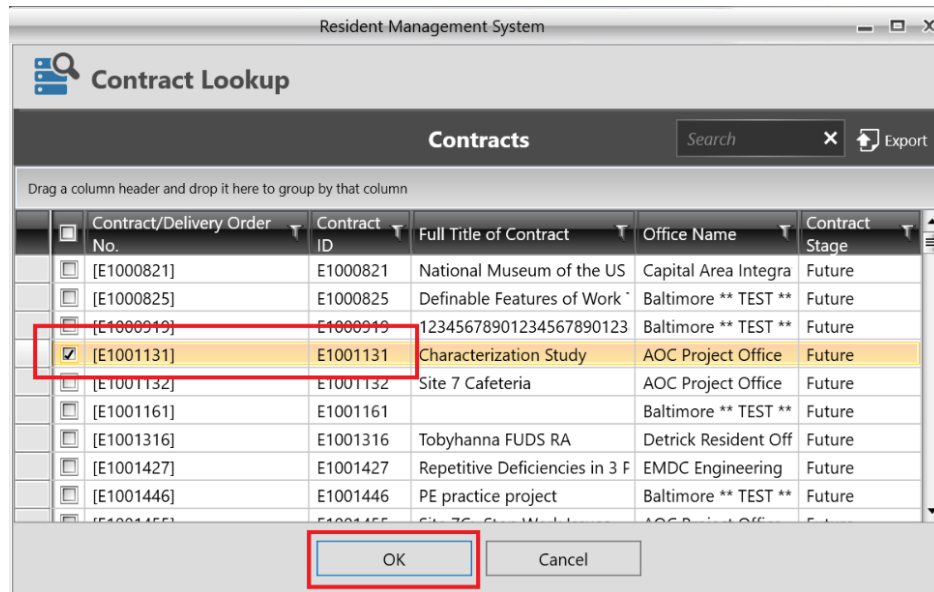
In this module, a list of all the contracts that have already been archived in RMS will display, including the date each contract was archived and other pertinent information.

Archived	Archived By	Contract Ref	Contract Description	Contract No.	Delivery Order No.	R e v.	Office ID	Contract Completed	Archive Reduction (KB)
3/25/2020 12:35		E1002009	Zero	W911KB-17-C-0002	NA	0			0
3/26/2020 11:31		E1002551	Archive Test		NA	1			0
3/5/2020 7:58:15		E1002030	test		NA	0			0

### 3.2.7.1 Archive a Contract

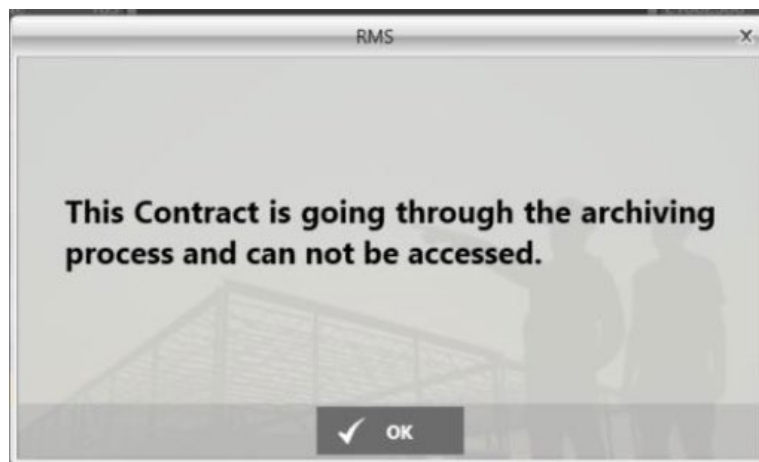
To archive a contract, start in *Library Mode* and click on the *Archive* button. This will bring up a *Contract Lookup* screen. Use the search box to search for the contract to be archived, and then click *OK*.

Contract/Delivery Order No.	Contract ID	Full Title of Contract	Office Name	Contract Stage
DACW31-01-C-0016	E1000044	Hudson Branch, Sec 14	Bay Area Office	Final Payment Made
DACA31-99-D-0021 0005	E1000059	NANSEMONT ORDANANCE DEPOT	Baltimore ** TEST ** Area	Active
DACW31-96-D-0094 0008	E1000060	PHASE II NPL LANDFILL	Baltimore ** TEST ** Area	Future
DACA31-95-D-0083	E1000065	UNDERGROUND TANK UPGRADE	Baltimore ** TEST ** Area	Future
DACA31-95-D-0083 0031	E1000072	REMED OF LANDFILL	Baltimore ** TEST ** Area	Future
DACA31-96-D-0026 0026	E1000073	DECONTAMINATE BLDG SURFACE	Baltimore ** TEST ** Area	Future
DACA31-01-C-0022	E1000120	Vehicle Control (Points) Access	Fort Meade Resident Office	Fiscal Complete
DACW31-01-C-0027	E1000121	Anacostia River, Phase I, Pkg II	Fort Meade Resident Office	Final Payment Made
DACA31-01-C-0040	E1000146	Chilled Water Line Extension	Walter Reed Resident Office	Final Payment Made
NAFFQ3-01-C-0001	E1000182	Design/Build Family Travel Camp	Fort Meade Resident Office	Final Payment Made
DACA31-01-C-0039	E1000183	Design/Build Fire Station	Walter Reed Resident Office	Final Payment Made

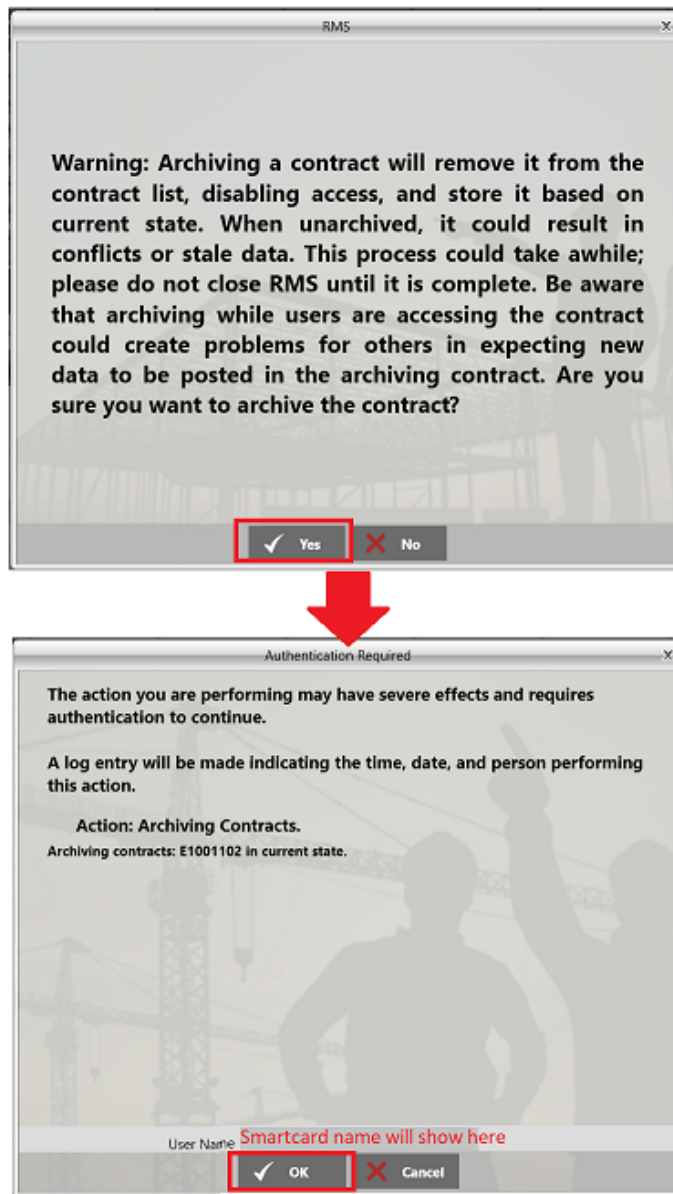


Then confirm the choice of archiving and enter credentials for authorization.

**Note:** On average, it will take one to two days to archive a regular sized contract with an average number of files attached. Once the archive process begins, an error message will display if the user tries to open the contract while it is being archived.



Users will not be able to access the contract to unarchive it until the archiving process completes. It is possible that the archiving process enters an error state and will continuously show the pop-up message above indicating that the contract is in the process of being archived. If this has occurred, contact the RMS Support Center to resolve the issue.



Once the process has completed successfully, the contract will now show in the [District Office | Archived Contracts](#) list.

### 3.2.7.2 Unarchive a Contract

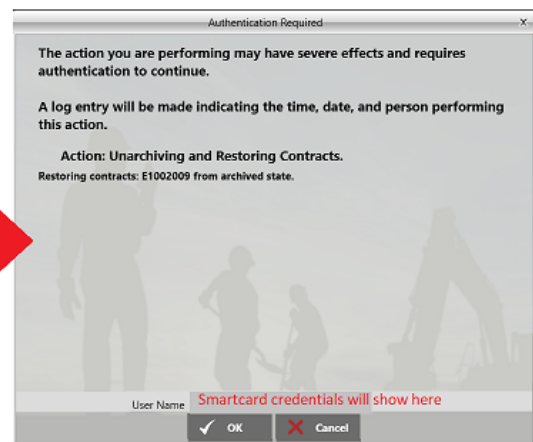
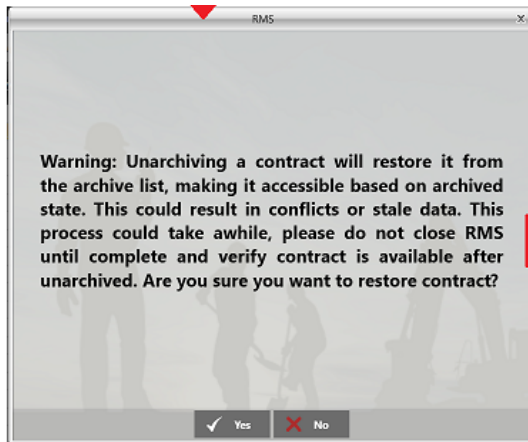
When a previously archived contract needs to be restored, go to the [District Office | Archived Contracts](#). Next, select the contract to be restored and click on [Unarchive Contract](#). Confirm selection by clicking continue and then click [OK](#) to authenticate the process.

**Unarchived Contract List**

Archive a Contract **Unarchive Contract** Export Contract Files Search X Export

Drag a column header and drop it here to group by that column

Archived	Archived By	Contract Ref	Contract Description	Contract No.	Deliver y Order	R e v	Office ID	Contract Completed	Archive Reduction (KB)	Unarchived
5/8/2023 10:0	JOHN	E1001778	Bldg 349 HVAC Syste	W912DR-10-D-0041	0037	0	E1000020		614	N
5/8/2023 10:0	JOHN	E1001766	Bldg. 5014, Roof Top	W912DR-10-D-0041	0031	0	E1000020		3703	N
5/8/2020 1:05	JAM	E1000171	Boiler Contracts CM :	DACA31-00-D-0053	0001	0	E1000026		0	N
6/20/2021 11:4	MS.A	E5000642	Building Exterior Ren	W912BU-18-R-0057	NA	0	E5000016		0	Y
5/10/2021 12:4	NJEP	E1002626	Closeout Training 20:	W9128F-16-D-0050	W9128F18	0	E1000048		0	N
5/14/2020 2:14	STEP	E1001959	ENG93 Test2	W912AB-17-C-0001	NA	0	E1		0	Y
3/26/2020 10:4		E1001999	eric g test add	W912ER-16-C-0004	NA	0			0	Y
9/1/2021 5:32:	HUA.I	E1000611	Expansion of Nations	W912DR-04-C-0049	NA	0	E1000030	09/10/2010	14583	N
7/25/2024 10:4	osley	E1002772	First United States Ar	W912GB00Q0001	NA	0	E1000066		0	N
9/1/2021 5:21:	HUA.I	E1001524	Ft Drum OASIS Site R	W912DQ-10-D-301C	DA01	0	E1000029	09/28/2012	5953	Y
6/20/2021 11:4	MS.A	E5000643	FY18 TYAD Bldg 2 Ba		NA	0	E5000016		0	Y
6/20/2021 11:4	MS.A	E5000655	FY19 Bloomsbury Da		NA	0	E5000016		0	Y



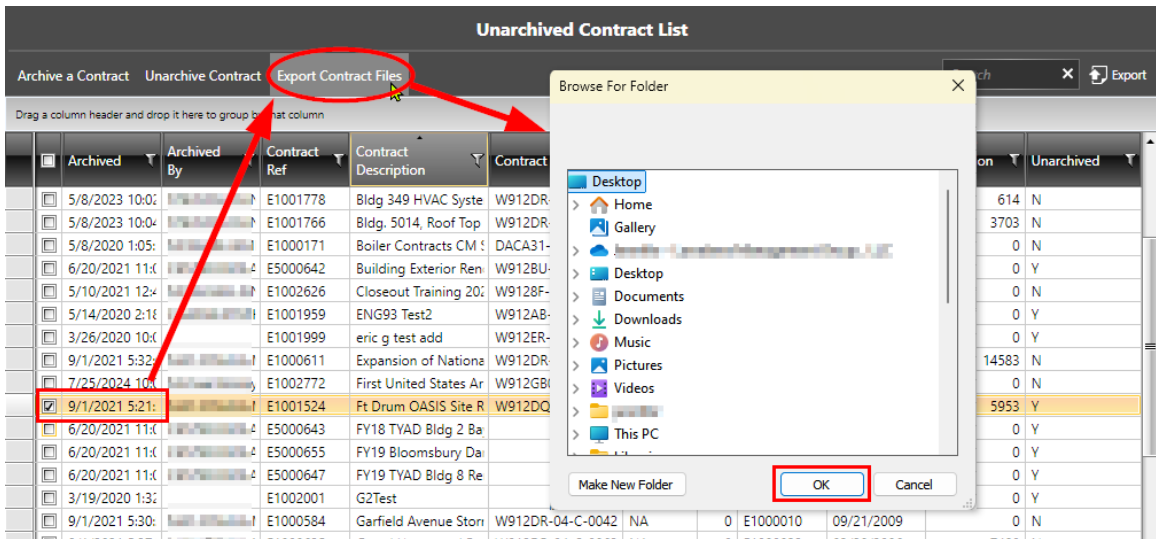
The contract can now be found in the [Library Mode](#) with all other live contracts.

### 3.2.7.3 Exporting Archived Contract Files

When users need access to the files in an archived contract, go to the [District Office | Archived Contracts](#).

**Note:** Only users with District Administration rights will be able to export archived contract files.

Next, select the contract the files are stored in and clicking on the [Export Contract Files](#) button. A popup window will display, asking where to save the files, select the target location to save the files and click [OK](#). Once the download completes, RMS will display the Windows File Explorer location of the previously selected target location.



**Note:** Additional data checks are performed on Contractor Payroll and Labor Interview related Document Package files. These packages are locked and cannot be downloaded. However, packages that do not contain PII (Personally Identifiable Information, such as bank account numbers, phone numbers, SSN and other information used to identify a person) information may be exported.

**Note:** If there are no files in the Contract File of the archived contract, when the download completes, no files will display.

### 3.2.9 Contract Security Classification

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
<b>Contract Security Classification</b>	Unlock Progress Payment		



Within the **Contract Security Classification** module, District Administrators and those with the appropriate permissions can set the CUI status for multiple contracts.

Contract Security Classification						
All Contracts	CUI Undetermined	CUI In Part	CUI In Whole	CUI Not Present		
1245	102	12	15	1115		
Drag a column header and drop it here to group by that column						
Office	Contract No.	Contract ID	Contract Title	Contract Stage	Classification	
> Fort Detrick Resident Office	W912DR-08-C-0065	E1001015	AFMIC (also known as NCMI)	Fiscal Complete	<Not Selected>	
Harrisburg Area Office	W912DR-09-D-0037	E1001418	TOCC for Ft Detrick and All	Future	Whole	
Baltimore ** TEST ** Area	W912DR-09-C-0018	E1001526		Final Payment Made	In Part	
JBM-HH Resident Office	W912DR-08-D-0020 0001	E1001287	Fence Upgrades Ft Myer	Fiscal Complete	None	
EMDC Engineering	DACA31-01-D-0029 0004	E1000581	Spring Valley TCRA [P2-110085]	Active	<Not Selected>	
Northeastern Resident Office	W912DR-06-C-0048	E1000744	Wilkes-Barre Phase 2C Riverfront Project	Fiscal Complete	None	
APG Integrated Program Office [E1001817]	[E1001817]	E1001817	Special Fire Extinguishing System	Active	<Not Selected>	
Baltimore ** TEST ** Area	DABA31-	E1000396	RWS Test Project 3.1	Active	Whole	

**Note:** Only District Administrators can edit the *Classification* for a contract once it has been set.

The blue sort tiles at the top can be used to narrow down the list of contracts. Changes in the *Classification* column will change the data found under [Contract Setup](#) for the corresponding contract.

The *Classification* column selection can be set or edited to:

- Whole
- In Part
- None

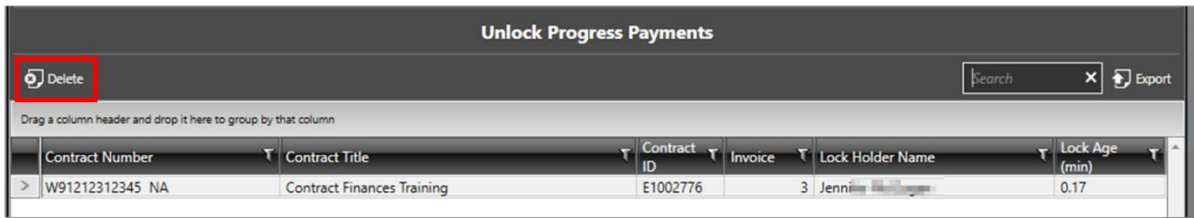
For more information on CUI, please see sections on [CUI Summary Report](#), [CUI](#), [Controlled Unclassified Information Policy](#) and [Document Packages](#) in this volume. CUI is also referenced in section 12.2.1 for Security Classification under section 12.2 for Generating Reports in Volume 3 for this manual.

### 3.2.10 Unlock Progress Payment

District Office	Position Titles	Contract User Roles	District Policy
Prime Contractors	FY Baseline Placement	Dredge Names	Archived Contracts
Contract Security Classification	Unlock Progress Payment		

The *Unlock Progress Payment* module can be used to remove the lock on Progress Payments within the District, if needed.

All active locks within the District will display here. Coordinate with the user listed in the *Lock Holder Name* column when removing a lock to ensure no data is lost when removing an invoice lock.

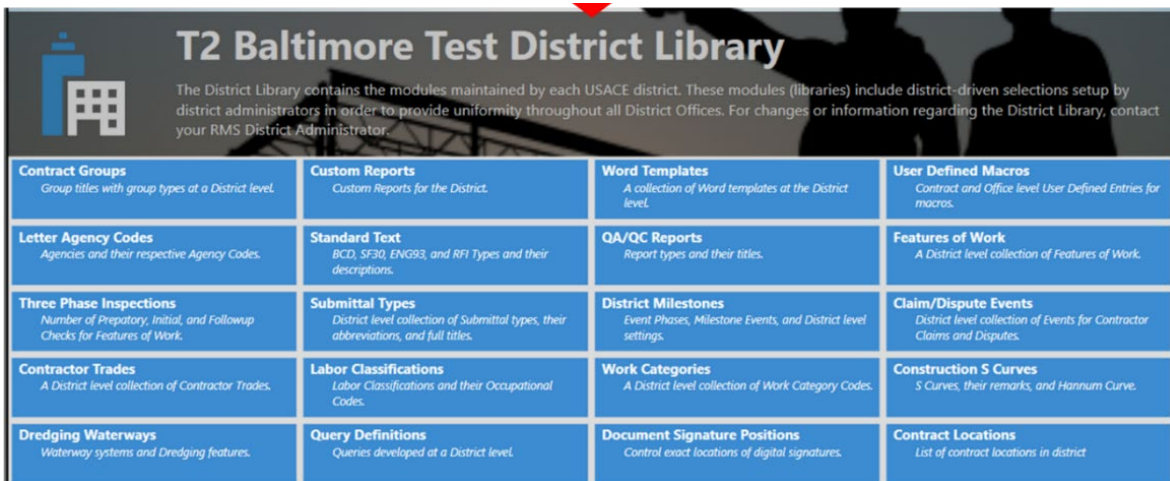
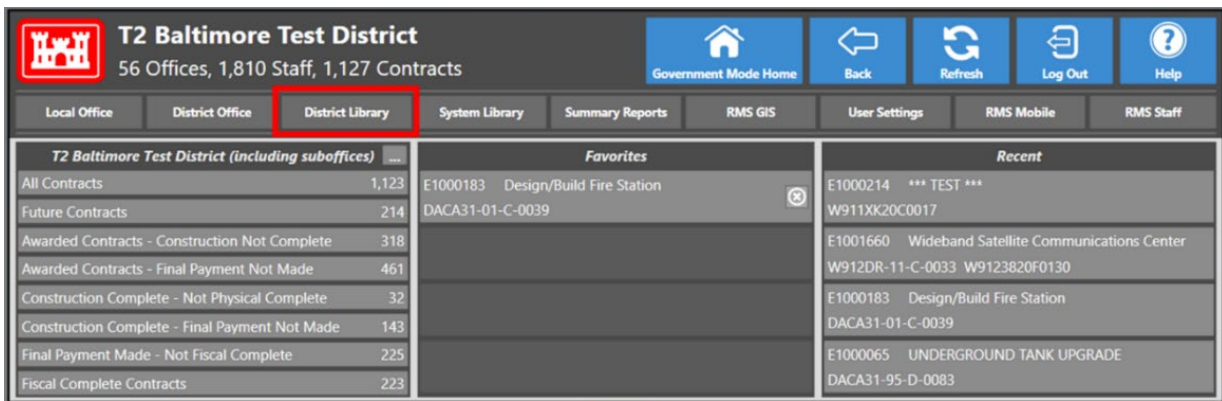


To remove a lock, select the applicable row and click the *Delete* button.

**Note:** If the user gets disconnected from network access while editing a Progress Payment, the lock should remain in place for 15 minutes before it is automatically removed. If the user reconnects before the 15-minute window expires, the lock will only be removed when the user exits the payment naturally.

### 3.3 District Library

Open this module to view and manage the Data Libraries that are used by all the offices in the District. Only District Administrators can edit data in this library.



The *District Library* module consists of the following:

**Contract Groups:** These are contract subsets defined by users that can be utilized in

Summary Reports to limit results to the contracts included in the group.

**Custom Reports:** These are reports that are designed by users. These reports can be added to either the contract or District Reports Library.

**Word Templates:** These are document templates created in Microsoft Word that can incorporate selected information from the RMS database.

**User Defined Macros:** User-defined macros enable users to identify often-used data that is not in the RMS database or not easily accessible from the RMS database for incorporation into the Word templates.

**Letter Agency Codes:** These are prefixes appended to a number used to serialize correspondence created in RMS to classify/identify a type of correspondence.

**Standard Text:** This is wording/text that is routinely used in the BCD, SF30, ENG93 and RFI documents.

**QA/QC Reports:** This module is used to identify the narratives that are included in the QA and QC Daily Reports.

**Features of Work:** This module contains a preloaded list of commonly encountered features of work which may be built-upon.

**Three Phase Inspections:** This module is used to add Preparatory, Initial and Follow-up work checks to the Features of Work.

**Submittal Types:** The 11 types of submittals (SD No.) as defined in [Section 01 33 00 Submittal Procedures](#) are listed here. These are not editable. Additional types may be added if needed.

**District Milestones:** Manage District Office milestones.

**Claim/Dispute Events:** Identify possible steps/milestones encountered during the Claims/Disputes process which can be used to track its progress through the system.

**Contractor Trades:** Frequently used Contractor Trades are listed here. All Subcontractors must be associated with a trade from this library.

**Labor Classification:** Commonly used Labor Classifications are listed here. This information is needed when reporting labor hours on the QC Daily Report.

**Work Categories:** Categories found here can be used to further sort and filter activities.

**Construction S Curves:** Use this module to define Placement Projection Curves.


**Dredging Waterways:** Use this module to keep track of the waterways for which the District has dredging oversight.

**Query Definitions:** Use this module to create and store SQL queries.

**Document Signature Positions:** Define additional positions for placement of electronic Signatures.

**Contract Locations:** Use this module to graphically identify a contract's location for use in section 3.6 [RMS GIS](#).

### 3.3.1 Contract Groups

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district.</i>

Use this module to create and store definitions that identify groups of contracts that are either made up of manually selected contracts or contracts that satisfy specific criteria. These groups can then be used when running [Contract Reports](#) or [Summary Reports](#) to obtain filtered results.

This is a shareable item in [System Library | RMS Asset Store](#). Click on [Add](#) to create a new group.

Contract Groups			
<span>Add</span> <span>Edit</span> <span>Delete</span>			
Drag a column header and drop it here to group by that column			
Name	Title	Group Type	Author
> QRYG_def	asdfasdf	Query	Paul
> QRYG_test3	funding	Manual	Cris
> QRYG_MILCON	MILCON CONTRACTS	Query	Jam
> QRYG_PLATEAUSUPPORT	PLATEAUSUPPORTGROUP CONTRACT GROUP	Manual	Mic

RMS Add-View

### Add Contract Group

The following information is required to add a new Contract Group

Name:

Title:



**Name:** Type in a name that is somewhat descriptive of the group being created. Do not overwrite the “QRYG\_” prefix. This is needed to identify this as a query in the database. The limit is 27 characters after the underscore character.

**Title:** Type in a descriptive title for the group being created. The limit is 60 characters. Click on [OK](#) when done.

The contents of the group can be determined [manually](#) or by [query](#) by selecting the appropriate radio button.

### 3.3.1.1 Manual selection

The screenshot shows the 'Contract Group' interface. At the top, there are two radio buttons: 'Manual' (selected and circled in red) and 'Query'. Below this, there are input fields for 'Name' (containing 'QRVG\_manual\_sample'), 'Title' (containing 'Sample manual group'), and a larger 'Group Description' text area. At the bottom of the form, there is a 'Manual Selection' section with 'Add' and 'Delete' buttons. The 'Add' button is circled in red. Below this is a table titled 'Selected Contracts' with a search bar and an 'Export' button. The table has columns for 'Contract ID', 'Office Name', 'Contract No.', 'Delivery Order No.', and 'Full Title of Contract'. A red arrow points from the 'Add' button area down to the next screenshot.

Use this method to create a group whose contents are static, i.e., the included contracts never change.

**Group Description:** Briefly describe the contents of the group. This information is not mandatory; however, it will allow the purpose of the group to be recorded.

Clicking on **Add** will bring up the contract Lookup table, which is used to select the contracts that will be included in the group. Place a check in the box to include a contract in the group.

Click on **OK** when done. Click on the **BACK** button twice to return to the **District Library Menu**.

The screenshot shows the 'Contract Lookup' window. It features a table with columns: 'Contract ID', 'EROC code', 'Contract No.', and 'Full Title of Contract'. Several rows are highlighted in yellow, and checkboxes in the left margin are checked for these rows. At the bottom of the window, there are 'OK' and 'Cancel' buttons. The 'OK' button is circled in red. A red arrow points from the 'OK' button down to the next step.

Contract ID	EROC code	Contract No.	Full Title of Contract
<input checked="" type="checkbox"/>	E1	DACW31-00-C-0034	Tylerton Shoreline Project 1
<input type="checkbox"/>	E1	DACA31-01-C-0009	Upgrade Canine Road
<input type="checkbox"/>	E1	DACW31-01-C-0016	Hudson Branch, Sec 14
<input checked="" type="checkbox"/>	E1	DACA31-99-D-0021	NANSEMONT ORDANANCE DEPOT
<input type="checkbox"/>	E1	DACW31-96-D-0094	PHASE II NPL LANDFILL
<input type="checkbox"/>	E1	DACA31-95-D-0083	UNDERGROUND TANK UPGRADE
<input checked="" type="checkbox"/>	E1	DACA31-95-D-0083	REMED OF LANDFILL
<input checked="" type="checkbox"/>	E1	DACA31-96-D-0026	DECONTAMINATE BLDG SURFACE
<input type="checkbox"/>	E1	DACA31-01-C-0022	Vehicle Control (Points) Access
<input type="checkbox"/>	E1	DACW31-01-C-0027	Anacostia River, Phase I Pkg II
<input type="checkbox"/>	E1	DACA31-01-C-0040	Chilled Water Line Extension
<input type="checkbox"/>	E1	DACA31-00-D-0053	Boiler Contracts CM Support
<input type="checkbox"/>	E1	NAFFQ3-01-C-0001	Design/Build Family Travel Camp
<input checked="" type="checkbox"/>	E1	DACA31-01-C-0039	Design/Build Fire Station
<input type="checkbox"/>	E1	DACA31-00-C-0018	Bldg 205, Fire Protection Upgrade
<input type="checkbox"/>	E1	DACA31-99-D-0021	Lake Allen Spillway Dam Demolition
<input checked="" type="checkbox"/>	E1	DACW31-01-C-0072	Lake Allen Spillway Replacement
<input type="checkbox"/>	E1	DACA31-01-C-0037	Military Entrance Processing Station
<input type="checkbox"/>	E1	DACW31-96-D-0094	Tipton Landfills 1&2 LTM & Infiltration

### Contract Group

**Group Type**  Manual  Query

Name:

Title:

Group Description:

---

**Manual Selection**

**Selected Contracts**

Search  Export

Drag a column header and drop it here to group by that column

>	Contract ID	Office Name	Contract No.	Delivery Order No.	Full Title of Contract
	E1000120	...ent Office	DACA31-01-C-0022	NA	Vehicle Control (Points) Access
	E1000072	... Area	DACA31-95-D-0083	0031	REMED OF LANDFILL
	E1000073	... Area	DACA31-96-D-0026	1234	DECONTAMINATE BLDG SURFACE

### 3.3.1.2 Query selection

This method is only suitable for use by those familiar with SQL and the configuration of the RMS database. This method can be used to create a group whose contents are dynamic, i.e., the included contracts are selected each time the query is executed and therefore the results reflect the query's conditions at that time.

### Contract Group

**Group Type**  Manual  Query

Name:

Title:

Group Description:

---

**Query Selection**

SQL Text of the query:

Parameters

ID	Title	Type	Default
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Group Description:** Briefly describe the contents of the group. This information is not mandatory; however, it will allow the purpose of the group to be recorded.

**SQL Text of the query:** Enter the SQL statement that describes the desired group contents.

Click on **Execute Query** when the query entry is completed. The results of the query will be displayed which can then be exported for use outside of RMS using the **Export** button. See [Widgets Explained](#) section.

Click on the **BACK** button three times to return to the **District Library Menu**.



### 3.3.2 Custom Reports

<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

Use this module to create and store report templates. It is not intended to be used by the average user. It requires familiarity with SQL, the RMS database and the Report Designer App, Fast Report, none of which are covered in this User Guide. The following is only a description of how to include a custom report in RMS. For guidance on designing a custom report, see the [Getting Started with Custom Reports User's Manual](#) found on the [RMS Documentation page](#).

Normally, users will follow the instructions provided in the Getting Started with Custom Reports manual. However, there is a special case when trying to use the Contract Status Sheet as a basis for a new custom report, detailed in the section on [Using the Contract Status Sheet for a Custom Report Template](#).

Custom reports are considered shareable items that are found in the [System Library | RMS Asset Store \(Section 3.4.1\)](#). Click on **Add** to add a new custom report to the library.

Report Title	Author	Report Type	Report Menu
> Contract Status Report with Mod Details	RMS Center	D	ADMIN
Copy of All Transmittals	[Redacted]	C	ADMIN
CUSTOM REPORT WITHOUT CUI MARKED	[Redacted]	D	ADMIN
CUSTOM REPORT WITHOUT CUI MARKED	[Redacted]	C	ADMIN
End User Report	[Redacted]	C	ADMIN

**Custom Report**

Report Title: Report 63  
 Author: Logged in User name here  
 Report Type: District  
 Report Menu: Administration  
 Report Description: [Text Area]

Record Guid: 4B314929E6D143228EAB4F795071A420  
 Under Construction  
 Show in Government Mode  
 Show in Contractor Mode

Required Collections

Collection Name

Report Designer Contract ID: <Not Set>  
 RMS Custom Collection Fields: <Not Set>

Buttons: Launch Telerik Report Designer, Copy Report Template From an RMS Center Report, Copy Report Template From an End User Report

**Report Title:** Enter a title for the report that is descriptive of its contents.

**Author:** RMS will automatically enter the name of the logged in user. However, the name can be changed.

**Report Type:** Determines whether the report is for a single contract or multiple contracts. Select from the dropdown:

Contract
District

The contract selection will make the report visible in the **Contract Reports** module.

The District selection will make the report visible in the **Summary Reports** module.

**Report Menu:** Identifies the module with which the report is associated. Select from the dropdown:

None
Administration
Finances
QA/QC
Submittals
Schedules
Closeout
Library

**Record Guide:** This is an RMS generated record locator. This field is READ ONLY.

**Under Construction:** Keep this box checked until the report is ready to be published for use.

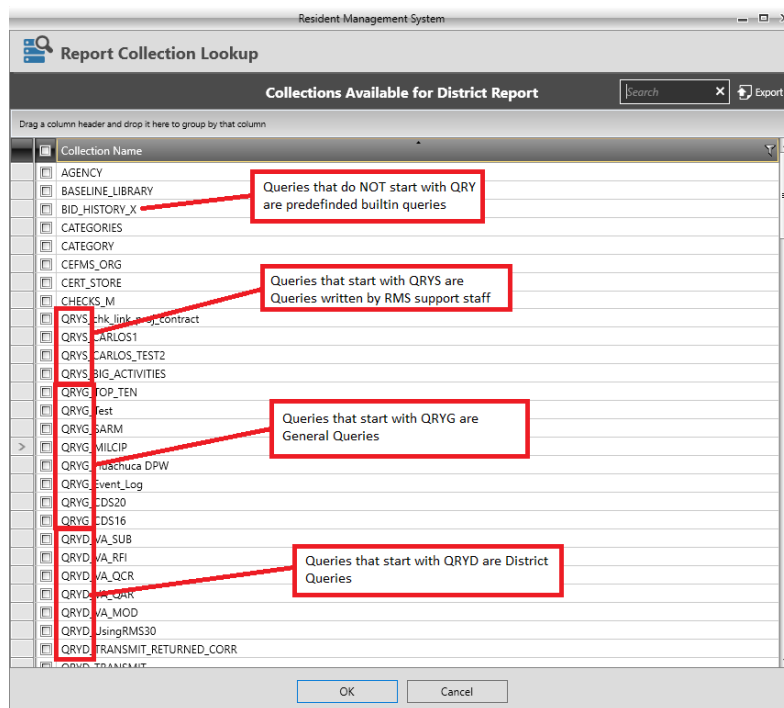
**Show in Government Mode:** Check this box for reports that can be accessed in Government Mode.

**Show in Contractor Mode:** Check this box for reports that can be accessed in Contractor Mode.

**Note:** A report can be included for access in both Government and Contractor Modes.

**Report Description:** Briefly describe the contents of the report. This information is not mandatory; however, it will allow the purpose of the group to be recorded.

**Required Collections:** Click on the + to display the Report Collection Lookup list. The list includes predefined queries built into RMS as well as the queries that have been added to the database by the RMS Support Center found in [System Library | Query Definitions](#), and users in the District found in [District Library | Query Definitions](#). Place a check on the queries needed to run the report, then **OK**.



**Report Designer Contract ID:** Enter the Contract ID for the contract to be used when testing the report.

**RMS Custom Collection Fields:** Use this selection to enable the report template to use a contract's Funding Chart and Status Photo. This feature is currently only used with the Contract Status Report with Mod Details Report (found in the RMS Asset Store).

**Launch Telerik Report Designer:** Click this button to open the Telerik Report Designer App. This is the tool used in RMS to design a report's layout and function.

**Copy Report Template From an RMS Center Report:** Use this selection to adapt an existing report rather than creating one from scratch. Click here to open the *RMS Report Lookup* table which contains all the reports that were designed by the RMS Center. Select the report to copy, then click on **OK**. This will copy the format of the report template to the current report which can then be edited by selecting [Launch Telerik Report Designer](#).

**Copy Report Template From an End User Report:** Use this selection to adapt an existing report rather than creating one from scratch. Click here to open the *Custom Report Lookup* table which

contains all the reports that were designed by users in the District. Select the report to copy, then click on **OK**. This will copy the format of the report template to the current report which can then be edited by selecting [Launch Telerik Report Designer](#).

Click on the **BACK** button twice to return to the [District Library Menu](#).

**Note:** When editing Custom Reports, to find the field and table names, users can use the [Information Overlay View](#) or the RMS Data Dictionary Report in the District Library.

### 3.3.2.1 Using Contract Status Sheet for a Custom Report Template

To use the Contract Status Sheet Report as a Custom Report template, there are several things that must be setup prior to using the template. First, navigate to the [System Library](#) and open the [Asset Store](#) module.

RMS Asset Store	Fund Types	Program Types	Contract Status Codes
RMS Resources such as reports, queries, templates and contract groups from other districts.	Appropriation categories used to execute an acquisition program provided by Congress.	Designator used to identify Mission of a program. Used with the Fund Type.	Designator to keep Managers aware of state of contract or action.
Primary Delay Codes	Mod Reason Codes	FAR References	Agency Codes
Provides explanation of impacts to contract completion or action.	Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.	Prescribed authorization for acquisitions or issuance of Contract Modifications.	Designator for the Agency that initiates a Contract action, such as a Modification.
Specification Sections	PD <sup>2</sup> CLIN Units	Category Codes and Units	RMS Reports
SpecInTact MasterFormat numbering system of the NASA Specification Production System.	Units of measure used in our Procurement System (PD <sup>2</sup> = Procurement Desktop Defense).	Real Property Codes and Units used to Transfer Real Property to the Using Agency.	Reports developed, maintained and supported by the RMS Support Center.
Query Definitions	CEFMS Batch Download Times	Controlled Unclassified Information Policy	
Queries developed, maintained and supported by the RMS Support Center.	List of CEFMS download times, all districts	List of additional CUI resources and policy documents	

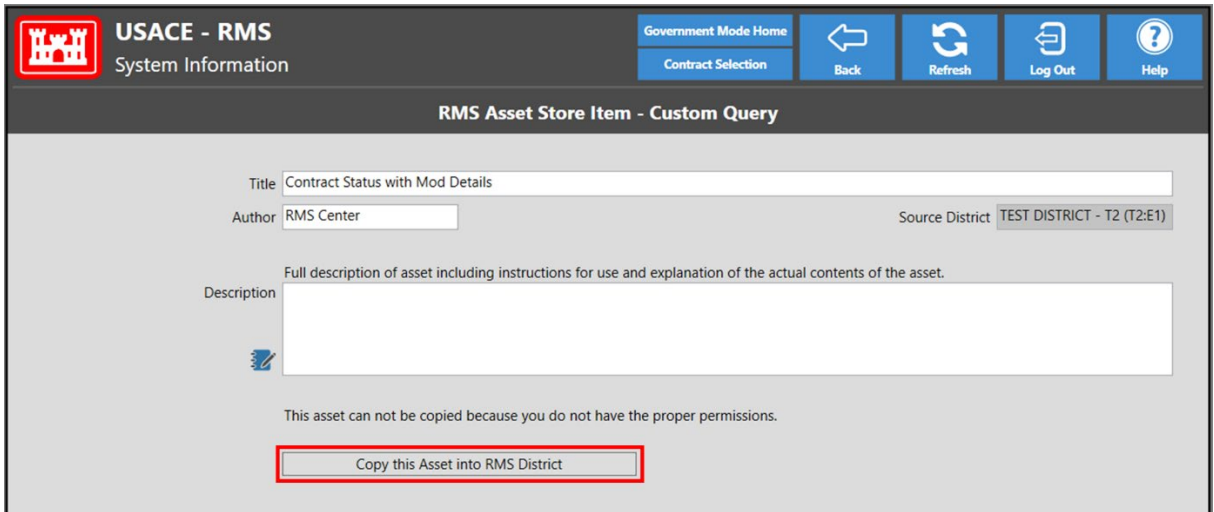
Next, search for “mod details” to reduce the number of items in the list.

All Assets	Contract Groups	Custom Queries	Document Templates	Standard Text	User Roles	Report Templates
175	12	84	12	3	3	59

Search: mod details

Asset Type	Title	Source District	Author	Last Updated
Custom Query	Contract Status with Mod Details	TEST DISTRICT - T2 (T2:E1)	RMS Center	11/16/2021
RMS TR Template	Contract Status Report with Mod Details	TEST DISTRICT - T2 (T2:E1)	RMS Center	05/17/2021

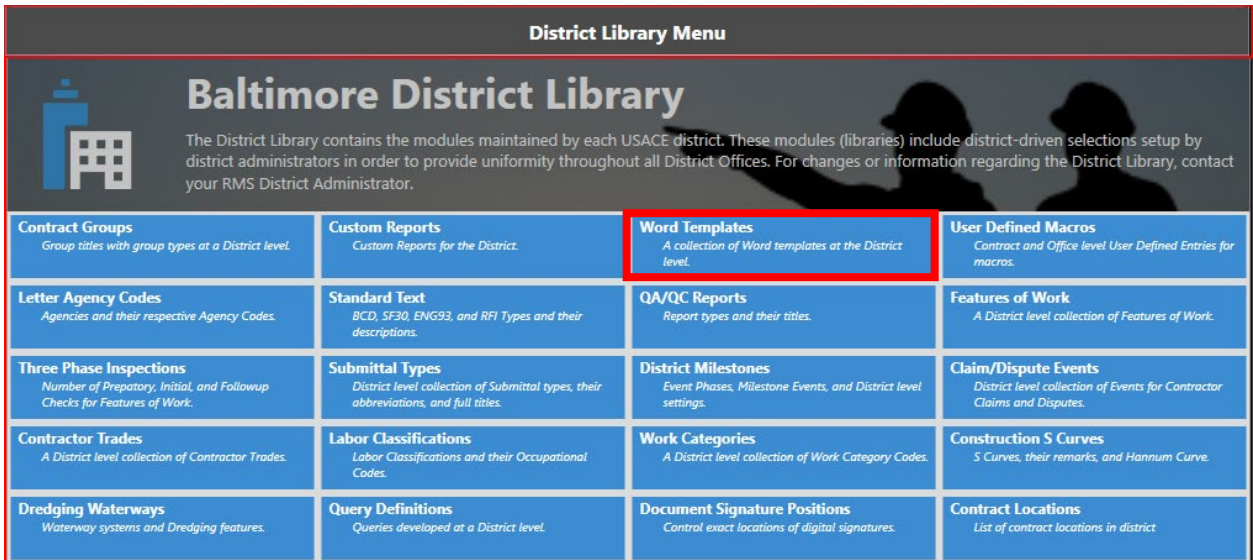
Proceed to open either the **Contract Status with Mod Details** asset or the **Contract Status Report with Mod Details** asset. Click on the button, [Copy this Asset into RMS District](#). Repeat for the other asset.



Now, the Custom Report Template is ready for users to customize. Navigate back to the [District Library | Custom Report](#) module and open the newly created report, Contract Status Report with Mod Details.



### 3.3.3 Word Templates



Use this module to create document templates in Microsoft Word. Stored templates are typically used to generate correspondence and selected contract-related documents. Templates are assigned to categories which are used to identify a document's type and the module from which it is accessed.

This is a shareable item in [System Library | RMS Asset Store](#).

The image shows two screenshots from a software application. The top screenshot is titled "Word Document Templates" and displays a table with columns for Category Type, Subcategory, and Description. The bottom screenshot is titled "Word Template Categories" and shows a list of categories grouped by "Category Type".

Category Type	Subcategory	Description
Letter to Contractor	MODs - Letters to Contractor	Mod Transmittal Letter with Consent of Surety
Letter to Contractor	MODs - Letters to Contractor	Modification to Contractor for Signature (Resident/Area Office)
Letter to Contractor	MODs - Letters to Contractor	NAB - SF30 For Signature
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter2
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter22
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter3
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter4
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter5
Letter to Contractor	MODs - Letters to Contractor	Unilateral Cover Letter6
Letter to Contractor	QC - Letters to Contractor	CQC Letter of Authority
Letter to Contractor	QC - Letters to Contractor	CQC Plan Requirements to Contractor
Letter to Contractor	QC - Letters to Contractor	DSABH
Letter to Contractor	QC - Letters to Contractor	EGH LETTER TO CONTRACTOR

Form Letter Cat Name
Closeout Document
Government In-House Memo
Letter to Contractor
Letter to Other Agency
Modification Document
Office Document
Request for Proposal

**Note:** To understand the process of creating templates, the [Word Template Categories](#) section will be discussed before the [Word Document Templates](#) section of the module.

### 3.3.3.1 Word Template Categories

There are 9 categories to which a document template can be assigned. A document's category determines where the document is accessed. Templates are only accessible from the module with which it is associated.

Categories are locked and cannot be changed. However, subcategories can be added or deleted to these. A subcategory can be deleted only when there are no Word templates associated with it.

The screenshot shows the "Word Template Categories" interface. Two columns are highlighted with red boxes: "Template Category" and "Associated Module".

Template Category	Associated Module
Closeout Document	Closeout   Closeout Documents
Government In-House Memo	Administration   Correspondence
Letter to Contractor	Administration   Correspondence
Letter to Other Agency	Administration   Correspondence
Modification Document	Finance   Contract Modifications
Office Document	Local Office   Office Documents
Request for Proposal	Finance   Contract Changes

**Building Block**—Frequently used blocks of text incorporating RMS data for insertion into other templates.

**Letter to Contractor**—Serialized correspondence directed to the Contractor's home or site office.

**Closeout Document**—Documents included in a contract’s Closeout Package, e.g., Release of Claims, Final Inspection Memo, Warranty Letter, Transfer Memo, Final Pay Memo, etc.

**Contract Document**—Documents that are associated with a contract, such as documents that were created and stored in RMS 2.38.

**Letter to Other Agency**—Correspondence sent to other Government agency.

**Government In-House Memo**—Correspondence sent to other offices within the District.

**Modification Document**—Documents included in the Modification Package, e.g., PNM.

**Office Document**—Document Templates that are standardized to be used by the office.

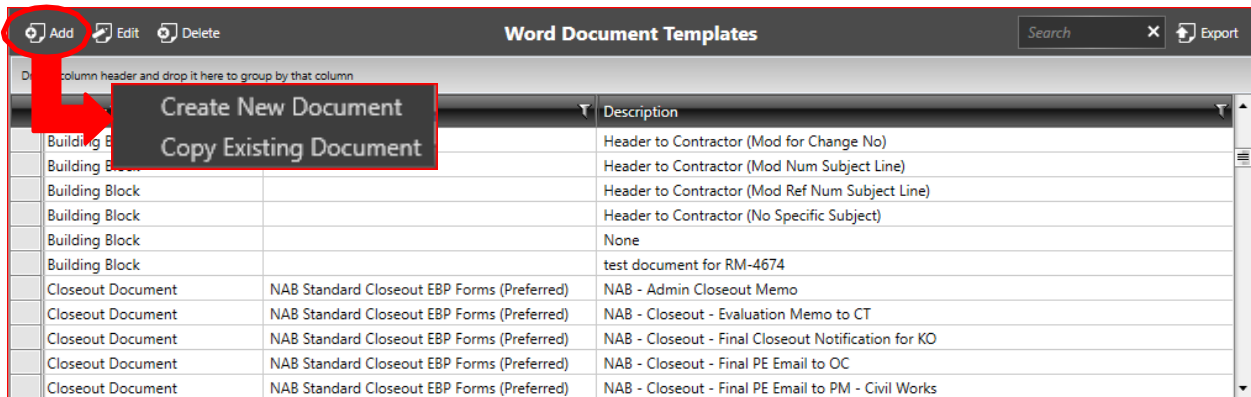
**Request for Proposal**—Letter to Contractor requesting a price proposal for proposed contract changes.

### 3.3.3.2 Word Document Templates

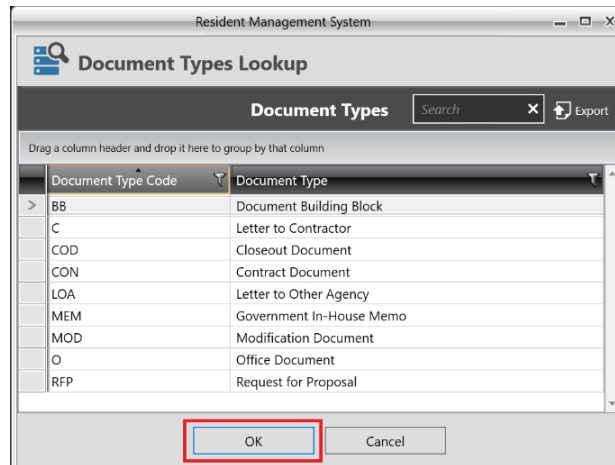
Use this area to manage document templates. Using this feature allows selected data from the RMS database to be pulled directly into documents. This is accomplished using predefined RMS macros in Word ([Summary Reports | RMS Word Macros](#)), [Building Blocks](#) and [User-Defined Macros](#). There is no limit to the number of templates that can be created and stored here.

Click on [Add](#) to Create New Document or Copy Existing Document.

### 3.3.3.3 Create New Document



Select the **Document Type**, then click on **OK**. The Document Type sets the prefix for the document’s serial number, when used.



**Recommendation:** Include a serial number on documents as much as possible for easier reference and identification.

Enter a description for the new template, then click on **OK**.

**Add Word Template**

The following information is required to add a new Word Template

Description: New sample template

OK Cancel



**Word Template Edit - New sample template**

Title: New sample template

Author: [Empty]

Subcategory: <Not Set>

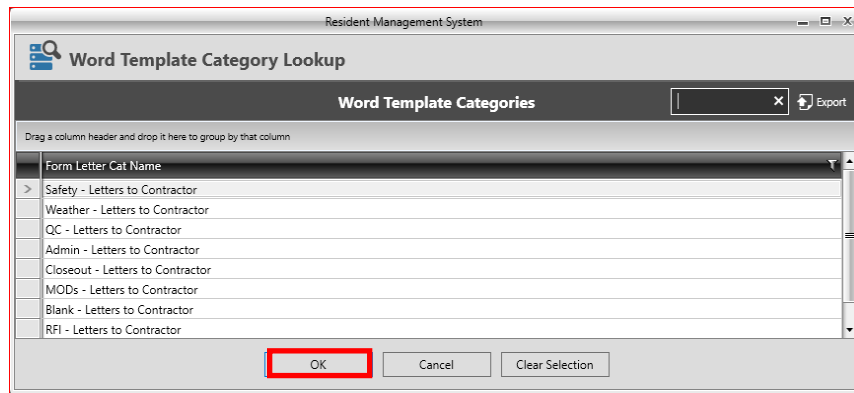
Date Format:
  mmm dd, yyyy
  dd mmmm yyyy
  mm/dd/yyyy
  ddmmmyyyy

Buttons:
   
Create Letter to Contractor
   
Edit Letter to Contractor
   
Delete Letter to Contractor
   
Import Letter to Contractor
   
Export Letter to Contractor
   
Test Letter to Contractor

**Title:** This defaults to the previous Description entered, but it may be changed here.

**Author:** This defaults to the logged in user, but it may be changed here.

**Subcategory:** Click on the blue box to select from the Word Template Categories Lookup list that is displayed, then click on **OK**.



**Date Format:** Select the radio button corresponding to the date format to apply to dates inserted in the documents using macros.

**Create:** Select to create a new document template from scratch. This selection will open a blank document in Word.

**Edit:** Select to edit an existing document template. This selection will open the document in Word. After completing edits, close the Word window by clicking on the **X** in the top right corner to save the template to the RMS database and exit back to RMS.

**Delete:** Select to delete an existing document template.

**Import:** Select to import an existing document into the document template. This will bring an external document into RMS. Click on **Edit** to tailor the imported document to its intended use.

**Export:** Select to export the document template for use outside of RMS.

**Note:** Macros linked to the RMS database will not work in the exported document.

**Test:** Select to test the document template.

### 3.3.3.4 Create a Template...

This selection opens a blank document in Word for designing the template. Type in the text and format as desired in the finished document. Use **CTRL+F9** to insert Word macros, RMS macros, user-defined macros, and/or building blocks. Type in the name of the macro/building block's title between the provided braces.

**Note:** Users must use the braces generated from the **CTRL+F9** key combination. Manually typed braces will not work.

When finished, the template must be saved to the RMS database for the macros to work. Click on the 'X' in the top right corner of the Word window to save and exit back to RMS.

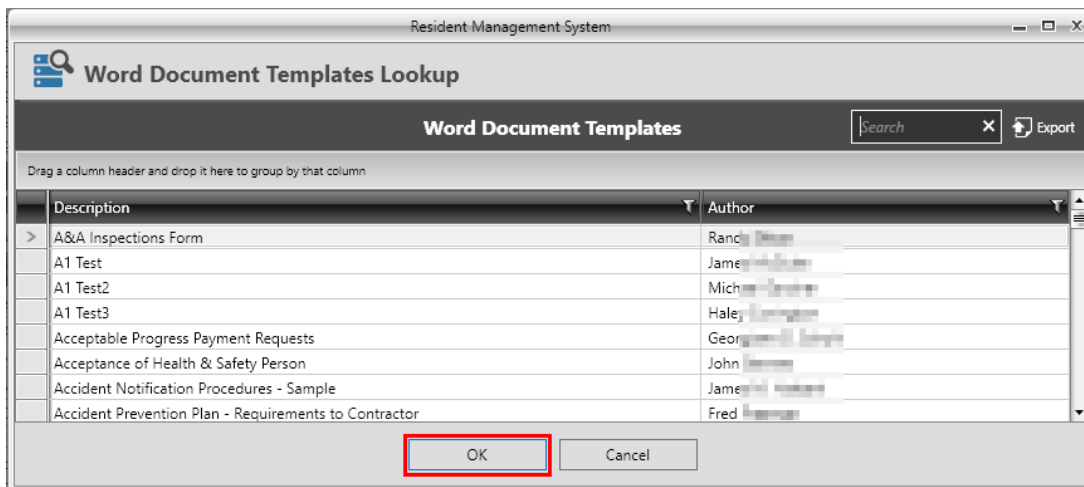
Click on the **BACK** button twice to return to the *District Library Menu*.



### 3.3.3.5 Copy Existing Document

Select the template from which to copy from the Word Document Templates Lookup list, then **OK**. This action copies the entire contents of the existing template into the new template.

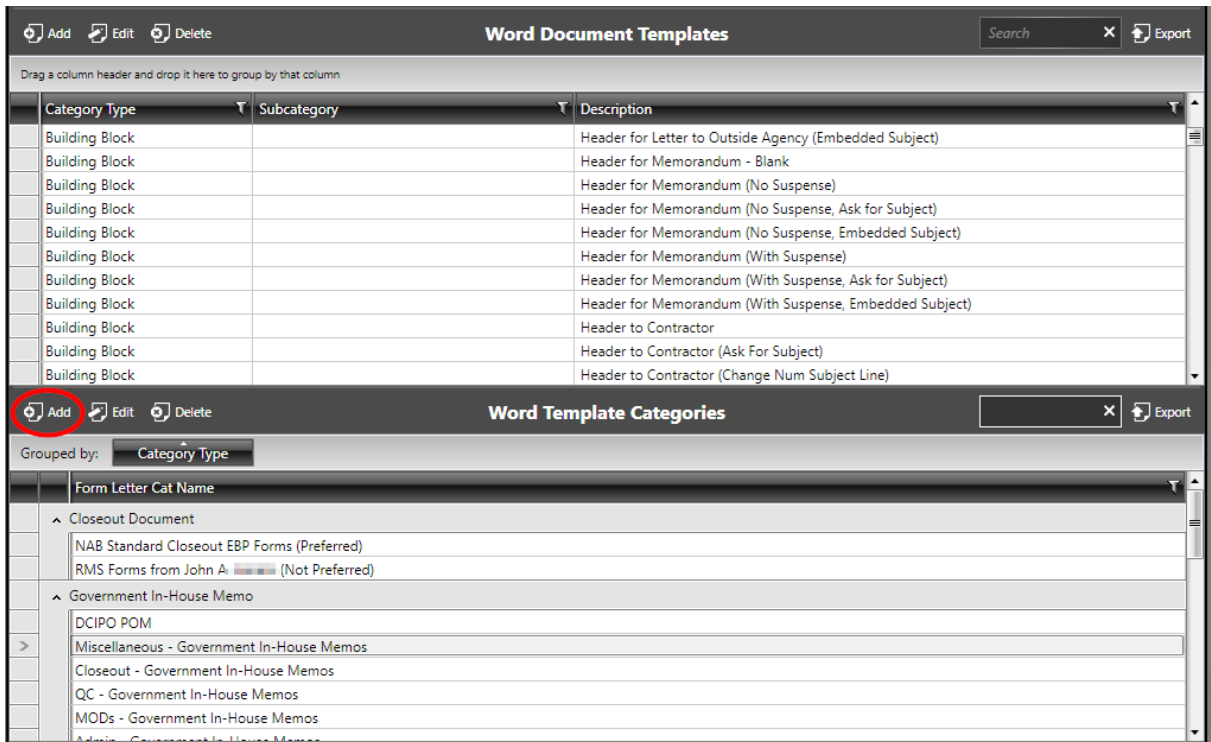
Select **Edit** to tailor the new template to its intended use.



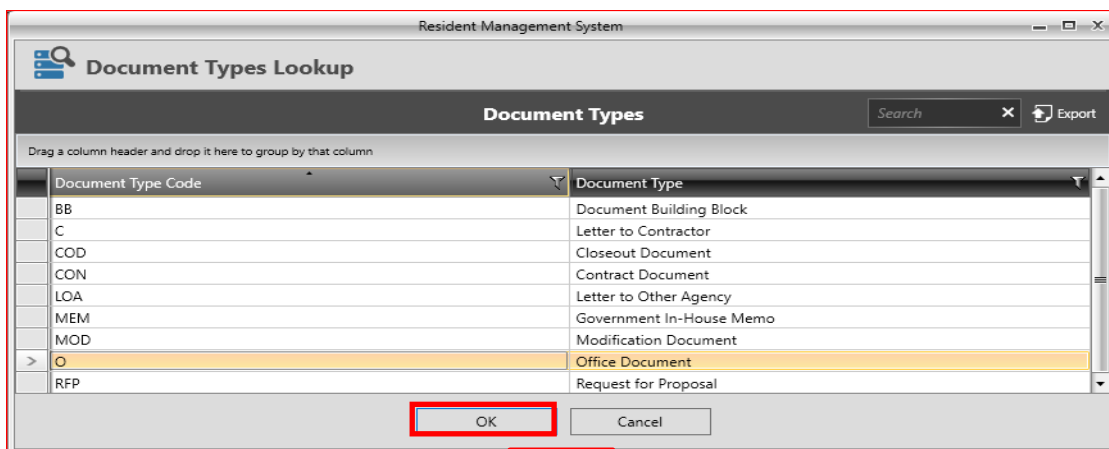
### 3.3.3.6 Word Template Subcategories

Use this area to manage the document template subcategories.

Click on **Add** to add a subcategory.



Select the category in which the subcategory will be added, then click on **OK**.



Enter a name for the **Subcategory title**, then click on **OK**.

Click on the [Back](#) button to return to the [District Library Menu](#).

### 3.3.4 User Defined Macros

District Library Menu			
<p><b>Baltimore District Library</b></p> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

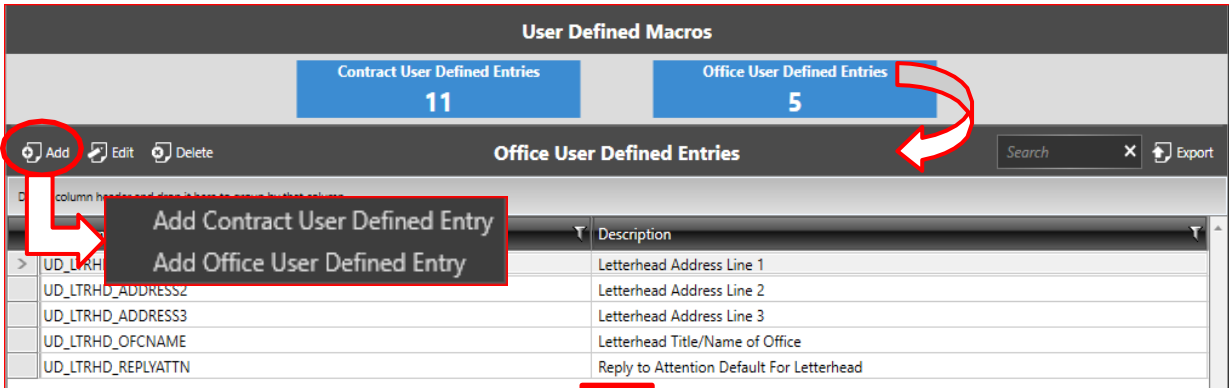
User-defined macros are created by the District Administrator for use in Word templates to pull RMS data into user-generated documents. There are two types of user-defined macros:

- **Contract User-Defined Entries:** These are used to identify data specific to a contract. The data corresponding to these macros are entered in [Administration | Contract User Entries/Special Data](#), [Contract User Entries](#) tab.
- **Office User-Defined Entries:** These are used to identify data associated with an office. The data corresponding to these macros are entered in [Local Office | Office User Entries](#).

To add a macro to a template, place the cursor at the location where the data is needed, then use **CTRL+F9** to insert the macro braces, type in the [UDF Name](#) of the macro exactly as shown in the library list between the braces.

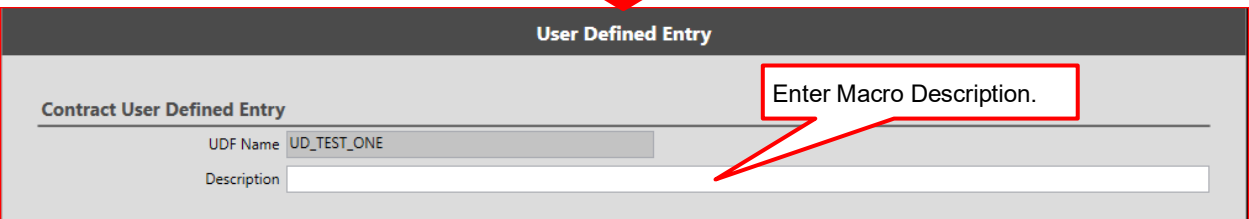
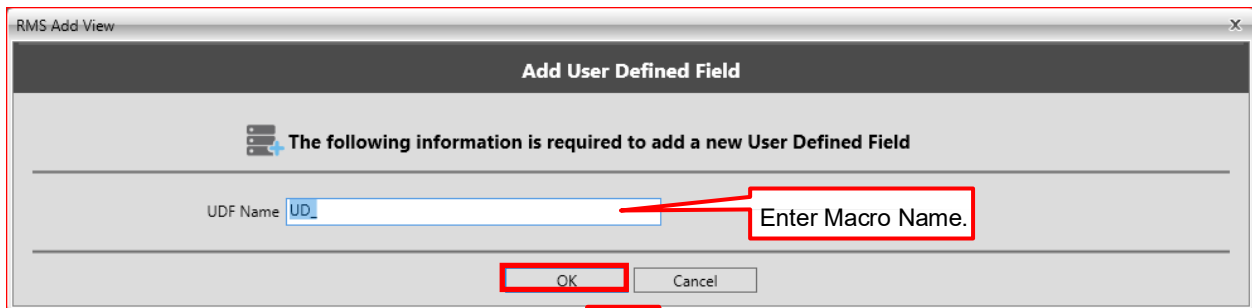
The list of user-defined entries corresponding to either of the types can be seen by simply clicking anywhere in the corresponding blue tile. A filtered list of the type selected will be displayed in the table below.

To create a new user-defined entry, click on **Add**, then select the type of macro to create.



All user-defined macro names begin with "UD\_". RMS automatically inserts these characters. Do not delete or change. Add a name for the macro after the underscore, then **OK**. Limit the name to 37 characters, no spaces.


**Recommendation:** Use a name that is somewhat descriptive of the data retrieved by the macro. Instead of spaces, use the underscore character to separate parts of the name.



Click on the **BACK** button twice to return to the *District Library Menu*.

Here is a link for video on How to Troubleshoot Macros: Why Your Word Macros Are Not Appearing <https://www.youtube.com/watch?v=Gx4gU6TqQAs>.

### 3.3.5 Letter Agency Codes

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Prepatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

[Letter Agency Codes](#) are used to serialize correspondence. Use of serial numbers on correspondence is encouraged to help identify type, destination, or source. RMS is programmed to recognize a few preset agency codes, but as many other identification codes as desired can be added.

Code	Usage
A/E	Letter to Architect/Engineer
C	Letter from Government to Contractor
H	Letter from Contractor's Home office to Government
MEM	Government in-house memorandum
MFR	Memorandum for record
MSC	Miscellaneous Correspondence
RFP	Request for Proposal
S	Letter for Contractor's Site office to Government

Agency Code	Agency
A/E	ARCHITECT/ENGINEER
AFR	AIR FORCE HEADQUARTERS CIVIL ENGINEER
AOC	Architect of the Capitol
B/P	U.S. BORDER PATROL
BCE	BASE CIVIL ENGINEER
C	Letter to Contractor
CFC	CENTRAL FACILITY CENTER



To add a new code, click on **Add**. Codes are limited to 3 characters.

RMS Add View

### Add Letter Agency Code

The following information is required to add a new Letter Agency Code

Agency Code

Enter code; max 3 characters.

OK Cancel



### Letter Agency Code

Agency Code

Agency

Correspondence Type

Letter  
Email


**Agency Code:** Serial number prefix.

**Agency:** Destination of correspondence, correspondence purpose, or any correspondence set which requires separate identification.

**Correspondence Type:** Select either **Letter** or **Email** from the drop down to identify the type of correspondence.

Click on the **BACK** button twice to return to the **District Library Menu**.

### 3.3.6 Standard Text

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district.</i>

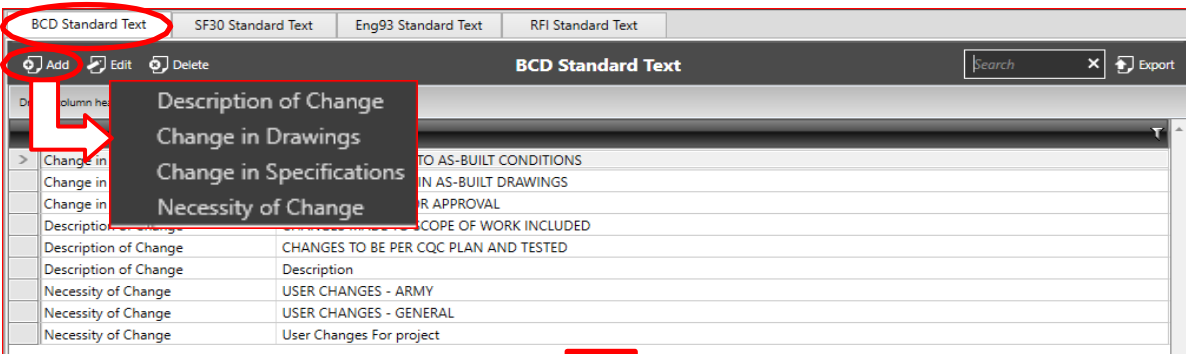
The **Standard Text** module is used to store verbiage that is frequently used in the BCD, SF30, ENG93 and RFI. Use of the entries stored in this library enables users to include language quickly and easily in these documents that has been standardized and approved for use.

This is a shareable item in [System Library | RMS Asset Store](#).

To add a Standard Text entry, select the document type in which the text will be used, then click on **Add**.

#### 3.3.6.1 BCD Standard Text

There are 4 types of standard text available for the BCD. Click on **Add**, then select the desired type from the drop down.



BCD Standard Text	SF30 Standard Text	Eng93 Standard Text	RFI Standard Text																																
<div style="display: flex; justify-content: space-between; align-items: center;"> <span>Add Edit Delete</span> <span>BCD Standard Text</span> <span>Search X</span> <span>Export</span> </div> <table border="1"> <thead> <tr> <th>Description of Change</th> <th>Change in Drawings</th> <th>Change in Specifications</th> <th>Necessity of Change</th> </tr> </thead> <tbody> <tr> <td>Change in</td> <td>TO AS-BUILT CONDITIONS</td> <td>IN AS-BUILT DRAWINGS</td> <td>FOR APPROVAL</td> </tr> <tr> <td>Change in</td> <td>SCOPE OF WORK INCLUDED</td> <td></td> <td></td> </tr> <tr> <td>Description of Change</td> <td>CHANGES TO BE PER CQC PLAN AND TESTED</td> <td></td> <td></td> </tr> <tr> <td>Description of Change</td> <td>Description</td> <td></td> <td></td> </tr> <tr> <td>Necessity of Change</td> <td>USER CHANGES - ARMY</td> <td></td> <td></td> </tr> <tr> <td>Necessity of Change</td> <td>USER CHANGES - GENERAL</td> <td></td> <td></td> </tr> <tr> <td>Necessity of Change</td> <td>User Changes For project</td> <td></td> <td></td> </tr> </tbody> </table>				Description of Change	Change in Drawings	Change in Specifications	Necessity of Change	Change in	TO AS-BUILT CONDITIONS	IN AS-BUILT DRAWINGS	FOR APPROVAL	Change in	SCOPE OF WORK INCLUDED			Description of Change	CHANGES TO BE PER CQC PLAN AND TESTED			Description of Change	Description			Necessity of Change	USER CHANGES - ARMY			Necessity of Change	USER CHANGES - GENERAL			Necessity of Change	User Changes For project		
Description of Change	Change in Drawings	Change in Specifications	Necessity of Change																																
Change in	TO AS-BUILT CONDITIONS	IN AS-BUILT DRAWINGS	FOR APPROVAL																																
Change in	SCOPE OF WORK INCLUDED																																		
Description of Change	CHANGES TO BE PER CQC PLAN AND TESTED																																		
Description of Change	Description																																		
Necessity of Change	USER CHANGES - ARMY																																		
Necessity of Change	USER CHANGES - GENERAL																																		
Necessity of Change	User Changes For project																																		

Enter a brief description of the text to identify the conditions under which the description should be used, then click on **OK**. This field is limited to 40 characters.

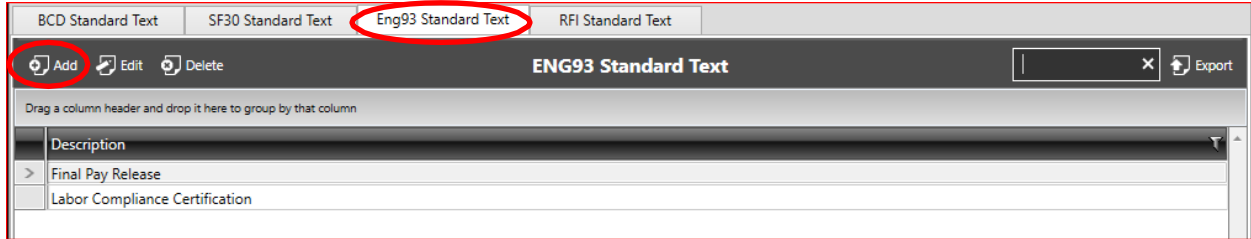
Enter the exact verbiage that comprises the selected Standard Text Type. There is no character limit. When done, click on the [Back](#) button twice to return to the [District Library Menu](#).

### 3.3.6.2 SF30 Standard Text

There are 5 types of standard text available for the SF30. Click on [Add](#), then select the desired type from the drop down. The subsequent steps are the same as those described for the [BCD Standard Text](#).

### 3.3.6.3 ENG93 Standard Text

To add a standard text, click on [Add](#). The subsequent steps are the same as those described for the [BCD Standard Text](#).

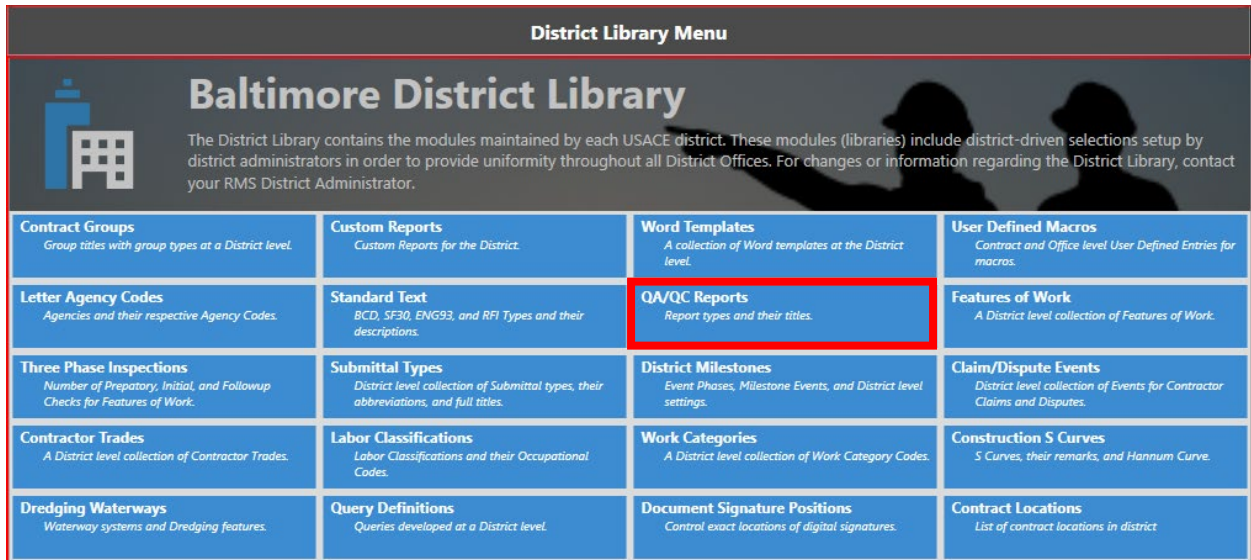


### 3.3.6.4 RFI Standard Text

To add a standard text, click on [Add](#). The subsequent steps are the same as those described for the [BCD Standard Text](#).

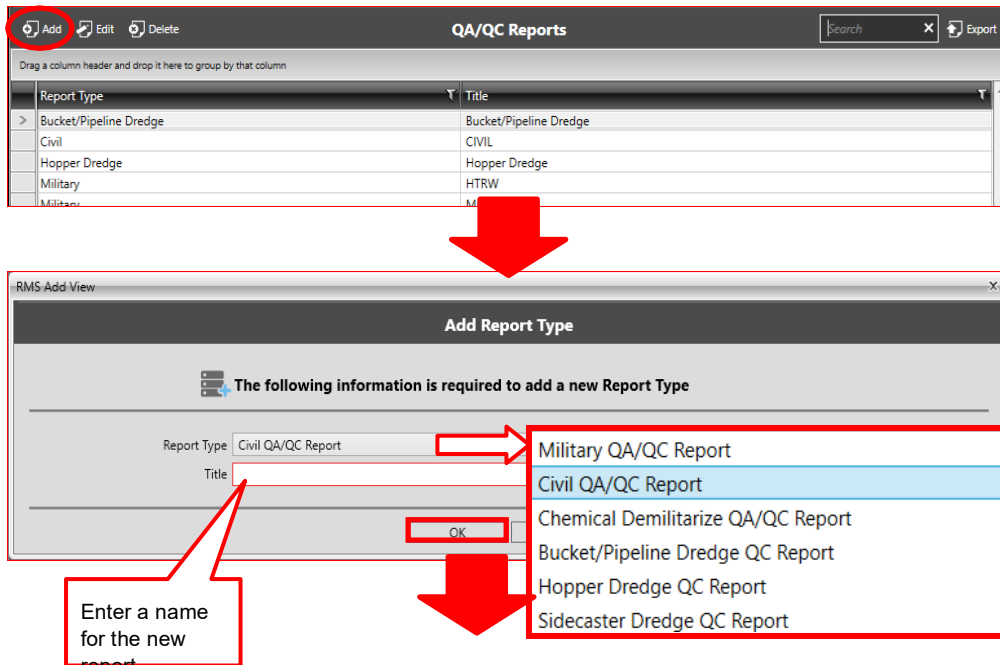


## 3.3.7 QA/QC Reports



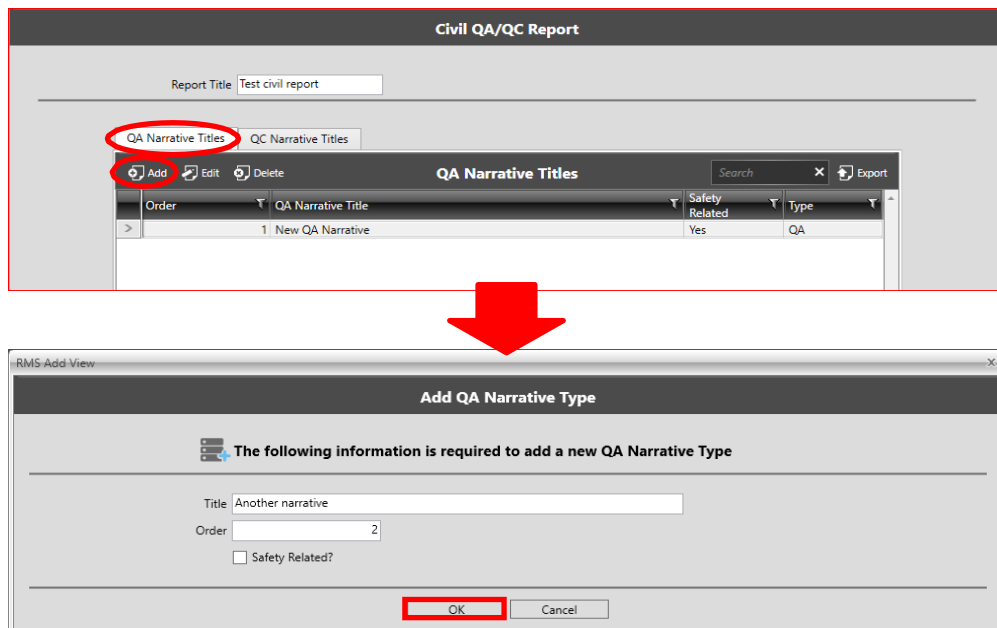
RMS supports the different Daily Report types used by the Corps of Engineers on Corps contracts. Each report type is designed to address the concerns specific to the work and issues typically encountered. This [QA/QC Reports](#) module enables the identification of the narratives needed to describe the day's events for each report type.

To add narratives, click on **Add** then select the Report Type to which the narrative applies from the drop down, enter a title for the narrative, then click on **OK**.



Select either the **QA Narrative Titles** tab or **QC Narrative Titles** tab to define the narrative contents of the new report. The narratives that are listed in this table will appear in the **Narrative Type Lookup** list when daily reports are written. Narratives must be defined for both QA and QC Reports. However, the Dredge Reports only include the option to enter QC Narratives.

Click on **Add** to enter a Narrative Title. Enter as many narratives as needed.




**Title:** Enter the topic of the narrative exactly as the narrative will appear on the report.

**Order:** This determines the order in which the narrative will appear on the report.

**Safety Related?:** Check this box if the narrative deals with a safety issue.




When done, click on **OK**. Continue to enter additional narratives for the report. When all narratives have been identified, click on the **BACK** button twice to return to the **District Library Menu**.

### 3.3.8 Features of Work

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
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<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
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Many of the common, frequently used Features of Work are already included in the RMS library. However, when other features are needed, those can be added here. This library is visible to and usable by the Contractor in RMS/CM.


Click on **Add** to add a new Feature of Work.

Features of Work	
  	<input type="text" value="Search"/> 
Drag a column header and drop it here to group by that column	
<input type="checkbox"/> Feature Description	<input type="checkbox"/> A/C SYSTEM, UNITARY TYPE <input type="checkbox"/> ACCESS FLOORING SYSTEM <input type="checkbox"/> ACOUSTICAL TREATMENT, CEILINGS <input type="checkbox"/> ACOUSTICAL TREATMENT, WALLS <input type="checkbox"/> ADMINISTRATION & MOBILIZATION <input type="checkbox"/> ARCH FURNISHINGS, INT/EXT



RMS Add View

### Add Feature Type


**The following information is required to add a new Feature Type**

---

Feature Description

Enter the name of the feature (30-character limit), then click on **OK**.

Click on the **Back** button to return to the **District Library Menu**.

### 3.3.9 Three Phase Inspections

District Library Menu			
<h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

Inspection checks for all the entries in the Features of Work library are managed here. This library is visible to and usable by the Contractor in RMS/CM.

To enter checks, select the feature to which the checks are to be added, then *Edit*.

Feature Description	Preparatory Checks	Initial Checks	Follow-up Checks
A/C SYSTEM, UNITARY TYPE		1	0
<b>ACCESS FLOORING SYSTEM</b>		0	0
ACOUSTICAL TREATMENT, CEILINGS		0	0
ACOUSTICAL TREATMENT, WALLS		0	0
ADMINISTRATION & MOBILIZATION		0	0
ARCH FURNISHINGS, INT/EXT		0	0
ASBESTOS ABATEMENT		15	12



The list of checks corresponding to any of the categories can be seen by simply clicking anywhere in the corresponding blue tile. A filtered list of the category selected will be displayed in the table below.

#### ACCESS FLOORING SYSTEM

**All Checks** 0

<p><b>Preparatory</b></p> <ul style="list-style-type: none"> <li>All 0</li> <li>Drawing Specification 0</li> <li>Repetitive Deficiencies 0</li> <li>Inspection Check 0</li> <li>Job Site Safety 0</li> <li>QA Evaluation 0</li> </ul>	<p><b>Initial</b></p> <ul style="list-style-type: none"> <li>All 0</li> <li>Inspection Check 0</li> <li>Job Site Safety 0</li> <li>QA Evaluation 0</li> </ul>	<p><b>Final Follow-up</b></p> <ul style="list-style-type: none"> <li>All 0</li> <li>Inspection Check 0</li> <li>QA Evaluation 0</li> </ul>
---	---	--

**All Checks** [Search] [Export]

**Add**

- Manually Add Inspection Check
- Copy Checks from 3 Phase Inspections in Library
- Copy Checks from 3 Phase Inspections in Contract
- Select Checks from 3 Phase Checks in Govt Library
- Select Checks from Work Types in Govt Library

Click on [Add](#), then select from the drop down.

### 3.3.9.1 Manually Add Inspection Check.

Select from the Check Type drop-down that identifies the type of inspection check being added. Describe the check in the box provided, then click on [OK](#).

RMS Add View

**Add 3 Phase Check**

The following information is required to add a new 3 Phase Check

Check Type: Preparatory - Drawings / Specification

Check:

Enter check description.

OK

Preparatory - Drawings / Specification  
 Preparatory - Repetitive Deficiencies  
 Preparatory - Inspection Check  
 Preparatory - Job Site Safety  
 Preparatory - QA Evaluation  
 Initial - Inspection Check  
 Initial - Job Site Safety  
 Initial - QA Evaluation  
 Final - Inspection Check  
 Final - QA Evaluation

Click on the [Back](#) button twice to return to the [District Library Menu](#).

**ACCESS FLOORING SYSTEM**

All Checks: 1

Preparatory	Initial	Final Follow-up
All: 1	All: 0	All: 0
Drawing Specification: 1	Inspection Check: 0	Inspection Check: 0
Repetitive Deficiencies: 0	Job Site Safety: 0	QA Evaluation: 0
Inspection Check: 0	QA Evaluation: 0	
Job Site Safety: 0		
QA Evaluation: 0		

Manually added check.

All Checks

Search X Export

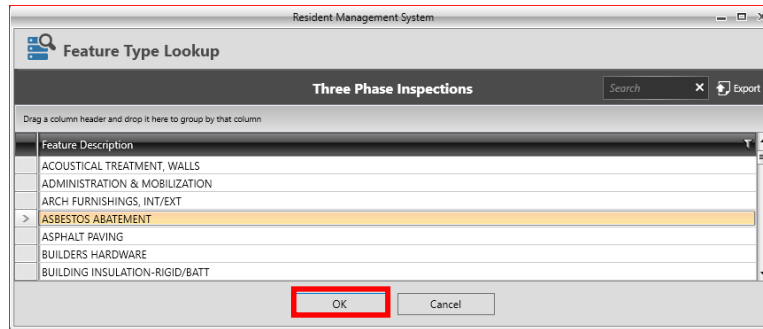
Drag a column header and drop it here to group by that column

Check No.	Check Type	Check
E1C00001	Preparatory - Drawings / Specification	Test check for Preparatory control meeting

### 3.3.9.2 Copy Checks from 3 Phase Inspections in Library

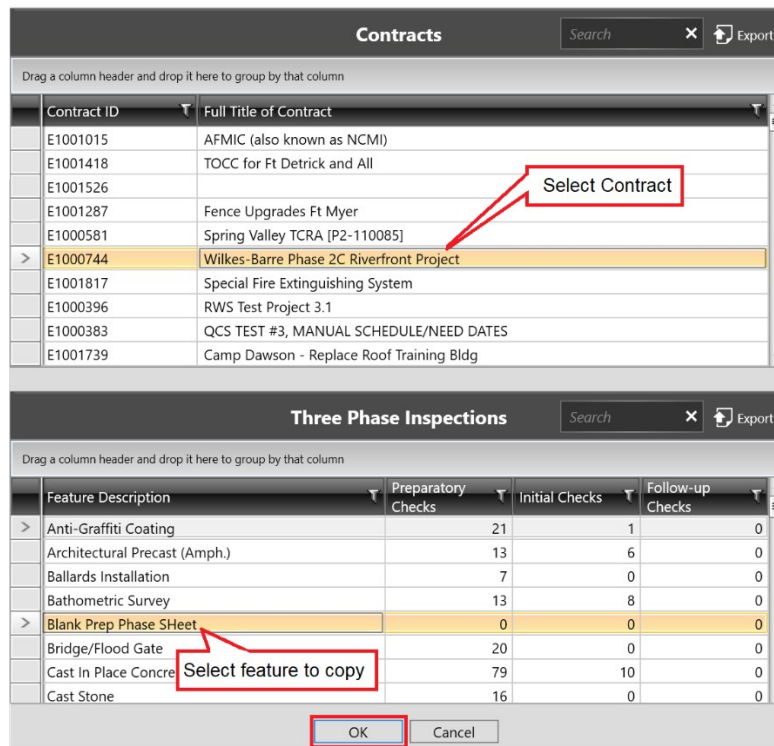
This selection will open a selection box that displays all Features of Work. Select the feature from which to copy, then click on **OK**. All the checks are now copied to the Feature library.

Click on the **Back** button twice to return to the **District Library Menu**.



### 3.3.9.3 Copy Checks from 3 Phase Inspections in Contract.

This selection will open a selection box that displays all the District's contracts in the upper half of the box. Click on a contract and the Features of Work with the number of Three Phase Inspections that are included in that contract will be displayed in the lower half of the box. Select the feature from to copy, then click on **OK**. All the checks are now copied to the **Features of Work** library.



**ACCESS FLOORING SYSTEM**

**All Checks** 40

Preparatory		Initial		Final Follow-up	
All	0	All	0	All	40
Drawing Specification	0	Inspection Check	0	Inspection Check	40
Repetitive Deficiencies	0	Job Site Safety	0	QA Evaluation	0
Inspection Check	0	QA Evaluation	0		
Job Site Safety	0				
QA Evaluation	0				

**All Checks** Search Export

Drag a column header and drop it here to group by that column

Check No.	Check Type	Check Description
E1G00013	Final - Inspection Check	09 69 00- 1/8/10 Raised Access Flooring Follow Up Operations Level 5, CL 7-11/D-F
E1G00014	Final - Inspection Check	11/30/09 09 69 00- Raised Access Flooring Follow Up Command Level 3 Elec./Telecom
E1G00015	Final - Inspection Check	09 69 00- 2/24/10 - Access Flooring Follow Up Command Building Level 4- TecCrete RAF.
E1G00016	Final - Inspection Check	09 69 00 - 3/09/10 - RAF Close In Inspect./Follow Up Command Level 5 NE- Tony, Ayeesha, an...
E1G00017	Final - Inspection Check	23 21 13 - 3/11/10 - Air Pressure Test: 5 PSI/15 min. Spec: 23 21 13 0359 Tested heating hot wa...
E1G00018	Final - Inspection Check	09 69 00 - 3/15/10 - Raised access floor Follow Up It was smooth and only one minor error whi...
E1G00019	Final - Inspection Check	09 69 00 4/19/10 - Follow Up Lab Level 2 North Side
E1G00020	Final - Inspection Check	5/19/10 - 09 69 00 - RAF close in Inspection Follow Up Commons Level 3 M3X06 and M3C12...
E1G00021	Final - Inspection Check	5/19/10 - 09 29 00- Gypsum Board Follow Up Acquisitions Level 1 Copy Rooms
E1G00022	Final - Inspection Check	6/2/10 - 09 69 00 - RAF close in Inspection Follow Up Lab Level 3 (L3A01 & L3A11)RAF close in...
E1G00023	Final - Inspection Check	6/9/10 - 09 69 00 - Raised Access Floor Close In Follow Up Acquisitions Level 3 C...
E1G00024	Final - Inspection Check	4/14/10 - Raised Access Floor Close In Follow Up Lab Level 2 (E-L 11-9)

Checks copied from selected contract

### 3.3.9.4 Edit or Delete Checks from 3 Phase Inspections

All the copied checks are now in the library and are the same as those in the copied contract. Any of the copied checks can still be deleted and/or edited. All of the copied checks do not need to be kept, and the details of the checks can be updated, as needed.

To change the details of a check, double click on the check or select the check and click on *Edit*. When done editing, click on the *Back* button twice to return to the *District Library Menu*.

Check No. E1C00005

Check Type Final - Inspection Check

Check 09 69 00- 2/24/10 - Access Flooring Follow Up Command Building Level 4- TecCrete RAF.

Edit check description.

To remove unwanted checks, click on *Delete*, and confirm deletion in the pop-up screen.

**All Checks** Search Export

Drag a column header and drop it here to group by that column

Check No.	Check Type	Check Description
E1G00001	Preparatory - Drawings / Specification	test

**Delete Confirmation**

**Delete this Work Check?**

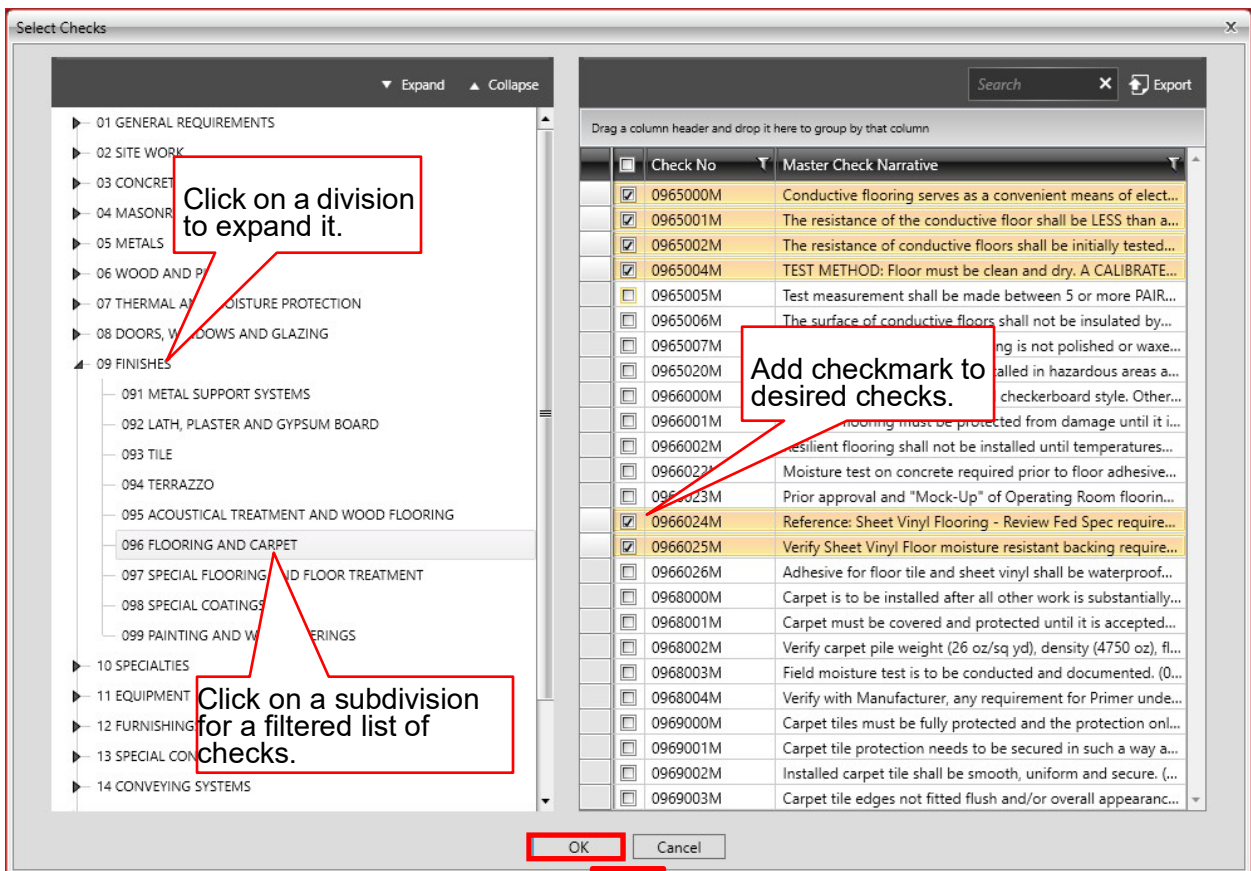
Check No. : E1G00001

Check Type : Preparatory - Drawings / Specification

### 3.3.9.5 Select Checks from 3 Phase Checks and Work Types in Govt Library

Both selections open a box containing a list of the CSI Divisions on the left and the checks associated with the selected division on the right.

Click on a division to expand it and see the subdivisions within it. Then click on the subdivision to see a filtered list of checks associated with the selected subdivision. Add a checkmark to the desired checks to add to the library, then click on **OK**. The selected checks are now copied to the *Features of Work* library.




All the copied checks are now in the library and are the same as those in the copied library database. Any of the copied checks can still be deleted and/or edited. All of the copied checks do not need to be kept, and the details of the checks can be updated, as needed.

To change the details of a check, select the check and double click on it or select **Edit**. When done editing, click on the **BACK** button twice to return to the *District Library Menu*. To remove unwanted checks, click on **Delete**. Individual checks, multiple checks, or all checks can be removed using the corresponding **Delete** action.




See examples from [Copy Checks from 3 Phase Inspections in Contract](#).

### 3.3.10 Submittal Types

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

There are 11 submittal types defined by the specifications and standardized across the Corps of Engineers. These are identified SD-01 through SD-11. These 11 types cannot be edited or deleted. However, when there is a need to separately identify and categorize other types of submittals, additional types may be identified and added here. Only user-added types can be edited and deleted.

To add a new type, click on [Add](#). Enter a 2-digit number greater than 11, then click on [OK](#). Numbers need not be sequential.

Submittal Types				Search	Export
 Add  Edit  Delete					
Drag a column header and drop it here to group by that column					
SD No.	Abb. Title	Full Title	Entry Type		
> 01	PRECON SUBMTL	PRECONSTRUCTION SUBMITTALS	System - Standard USACE Wide		
02	SHOP DRAWINGS	SHOP DRAWINGS	System - Standard USACE Wide		
03	PRODUCT DATA	PRODUCT DATA	System - Standard USACE Wide		
04	SAMPLES	SAMPLES	System - Standard USACE Wide		
05	DESIGN DATA	DESIGN DATA	System - Standard USACE Wide		
06	TEST REPORTS	TEST REPORTS	System - Standard USACE Wide		
07	CERTIFICATES	CERTIFICATES	System - Standard USACE Wide		
08	MFRS INSTR	MANUFACTURER'S INSTRUCTIONS	System - Standard USACE Wide		
09	MFRS FLD REPT	MANUFACTURER'S FIELD REPORTS	System - Standard USACE Wide		
10	O&M DATA	OPERATIONS AND MAINTENANCE DATA	System - Standard USACE Wide		
11	CLOSEOUT SUBMTL	CLOSEOUT SUBMITTALS	System - Standard USACE Wide		



RMS Add View

### Add Submittal Type

The following information is required to add a new Submittal Type

No.  Enter 2 digit number

Submittal Type - Not Set

SD No

Abbreviated Title

Full Title


**SD No:** Submittal Type Designation number, must be greater than 11.

**Abbreviated Title:** Enter an abbreviated, but descriptive, title for the Submittal Type. There is a 15-character limit.

**Full Title:** Enter a complete title for the Submittal Type. There is a 40-character limit.

Click on the **BACK** button twice to return to the [District Library Menu](#)

### 3.3.11 District Milestones

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

A milestone is a specific point in time within a project lifecycle used to measure the progress of a

project. Milestones have a fixed date but no duration and serve as progress markers. Milestones can indicate upcoming deadlines for anything related to the project, such as a project's start or end date, deadlines, submission of a major deliverable, and other fixed points in time that need calling out. Using milestones will allow monitoring and tracking of the progress of a schedule in real time.

In RMS, there are several levels of milestones:

- **Contract** — Only applicable to the contract (not found in this module) in which the milestone is added/created. See Government Manual Volume 3 section 9.0 **Schedules**.
- **Local** — Applicable to all contracts within an office (not found in this module), managed by the Office Administrator. See Section 3.1.8 **Local Office Milestones**.
- **District** — Applicable to all contracts within all offices in a District, managed by the District Administrator.
- **System** — Applicable to all contracts Corps-wide, managed by HQUSACE.

In addition, milestones are categorized by phase:

- **Design** — Events that occur prior to Contract Award.
- **Construction** — Events that occur after Contract Award and prior to the Contract Completion Date.
- **Post Construction** — Events that occur after the Contract Completion Date.

Upon opening District Milestones, **All Events** will be displayed. To view a specific category, click on the corresponding blue tile at the top of the screen. A filtered list of the category selected will be displayed in the table below.

Click on **Add** to create a new District Milestone.

District Milestones													
All Events 20		Design 5		Construction 6		Post Construction 9		System 13		District 7			
Add		Edit		Delete		All Events						Search	Export
Drag a column header and drop it here to group by that column													
Group	Phase	Milestone Event	Record Time	Always Add	Allow Delete	Allow NA	Order						
System	Construction	Contract Award	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1						
System	Post Construction	Beneficial Occupancy Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2						
System	Post Construction	Contract Physical Completion	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3						
System	Post Construction	Contractor Final Payment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4						
System	Post Construction	Transfer Document Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5						
System	Construction	Construction Completion	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6						




See [Local Office Milestones](#) for editing instructions.

Click on the [BACK](#) button twice to return to the [District Library Menu](#).

To delete a milestone, click on [Delete](#). Only District Milestones can be deleted here. This action will remove the milestone from the library but will not affect any contracts that have the milestone already included.

### 3.3.12 Claim/Dispute Events

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district.</i>

The [Claims/Disputes Event](#) module allows district administrators to add, edit or delete a list of all of the events for a District to use in contract's [Closeout](#) tab. Use this library to manage the scheduling of target dates for these events and to add other events which the district wants to include to track the Claim/Dispute to its conclusion.

Items 1-8 are added to all Claims/Disputes and cannot be deleted from the library. Additional events may be added/inserted into the workflow as needed.

### 3.3.12.1 Add Event

Click on **Add**. Enter a title for the new event, then click on **OK**.

Order No	Event Title	Add to New?
1	Received by Government	<input checked="" type="checkbox"/>
2	Action Complete-File Closed	<input checked="" type="checkbox"/>
3	Negotiated	<input checked="" type="checkbox"/>
4	SF30 signed by KTR	<input checked="" type="checkbox"/>
5	SF30 signed by GOV	<input checked="" type="checkbox"/>
6	<= 100K COD due	<input checked="" type="checkbox"/>
7	> 100K COD scheduled	<input checked="" type="checkbox"/>
8	COD Issued	<input checked="" type="checkbox"/>
9	Pauls Test	<input type="checkbox"/>
10	Test new event	<input type="checkbox"/>




**Event Title:** Enter a title for the new event that is descriptive of the step in the Claim/Dispute process. This field is limited to 40 characters.

**Add to New Claim/Dispute?:** Check this box to add the event to all claims/disputes created. This signifies a mandatory date entry.

**Order Number:** Enter a number to indicate when in the process this event occurs relative to the other events.

**Base Event Date On:** Select from the following to specify how this event is scheduled.

**Manually Entered Date:** Enter a date manually.

**System Generated Date:** The system will generate the date.


**Other Event Date:** Select this option to link the occurrence of the event to that of another event. Click on the selection box and select from the list shown.

Received by Government  
 Action Complete-File Closed  
 Negotiated  
 SF30 signed by KTR  
 SF30 signed by GOV  
 <=100K COD due  
 >100K COD scheduled  
 COD Issued  
 Pauls Test  
 Test new event  
 test

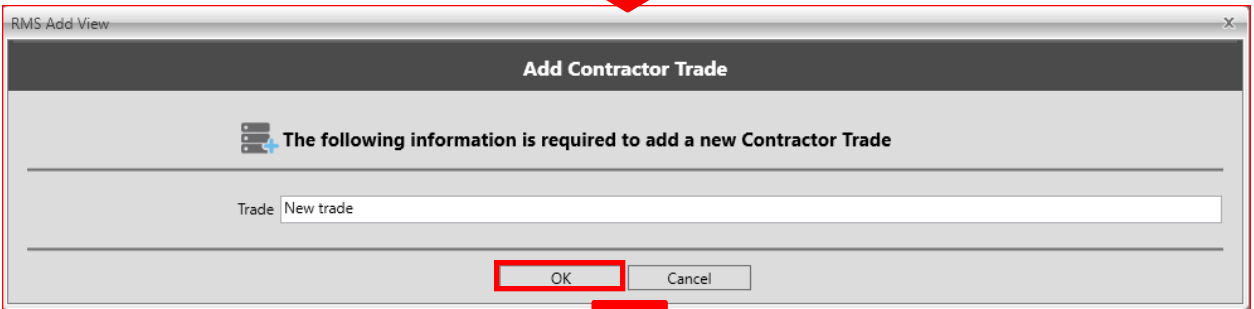
Enter a number in the **+ days** field to specify the number of days before (-) or after (+) the selected event that the new event occurs.

Click on the **BACK** button twice to return to the **District Library Menu**.

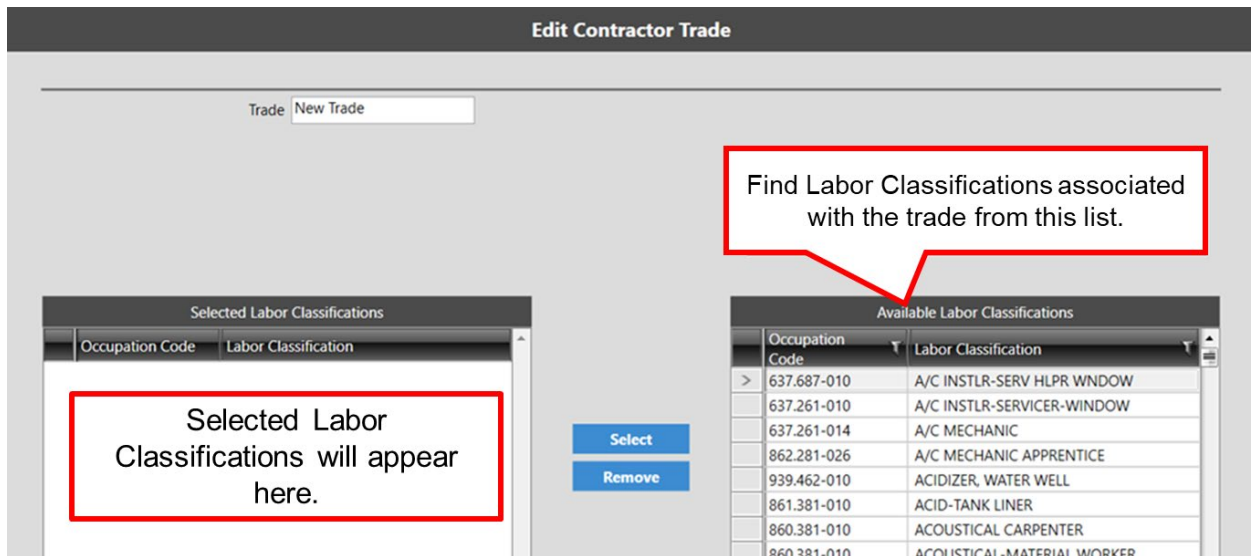
### 3.3.13 Contractor Trades

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hanum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

Frequently used Contractor Trades are listed here. This is the list from which the Contractor selects to identify a Subcontractor's trade in RMS/CM. To add a trade that cannot be found in the list, click on **Add**. Enter the name of the trade, then click on **OK**.




Find the Labor Classification(s) associated with the trade from the Available Labor Classifications list, then click on *Select*. Select as many as needed.



Click on the *Back* button twice to return to the *District Library Menu*.

### 3.3.14 Labor Classifications


District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

Commonly used **Labor Classifications** are listed here. This is the list from which the Contractor selects to report labor hours on the QC Daily Report in RMS/CM. To add a Labor Classification that cannot be found in the list, click on **Add**. Enter the name of the trade, then click on **OK**.

Labor Classifications		Search	Export
Add Edit Delete			
Drag a column header and drop it here to group by that column			
Labor Classification	Occupation Code		
> A/C INSTLR-SERV HLPR WINDOW	637.687-010		
A/C INSTLR-SERVICER-WINDOW	637.261-010		
A/C MECHANIC	637.261-014		
A/C MECHANIC APPRENTICE	862.281-026		
ACIDIZER, WATER WELL	939.462-010		
ACID-TANK LINER	861.381-010		

RMS Add View

### Add New Labor Classification


**The following information is required to add a new New Labor Classification**


Labor Classification:

### Edit Labor Classification




Labor Classification:

Click on the **BACK** button twice to return to the **District Library Menu**.

### 3.3.15 Work Categories


District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

Categories found here can be used to further sort and filter Pay Activities. These codes are entered in [Finance | Pay Activities](#) when used, however it is not a required entry. To add a Work Category that cannot be found in the list, click on [Add](#). Enter a code, then click on [OK](#).

Work Category Codes	
  	<input type="text" value="Search"/> <input type="button" value="X"/> <input type="button" value="Export"/>
Drag a column header and drop it here to group by that column	
Code	Work Category
> 1	11
2	test

RMS Add View

### Add Work Category


**The following information is required to add a new Work Category**

---

Category Code

---

### Edit Work Category Code

---

Code

Work Category

Enter a short title for the Work Category.

Enter a title for the Work Category, up to 15 characters long. When done, click on the [Back](#) button twice to return to the [District Library Menu](#).

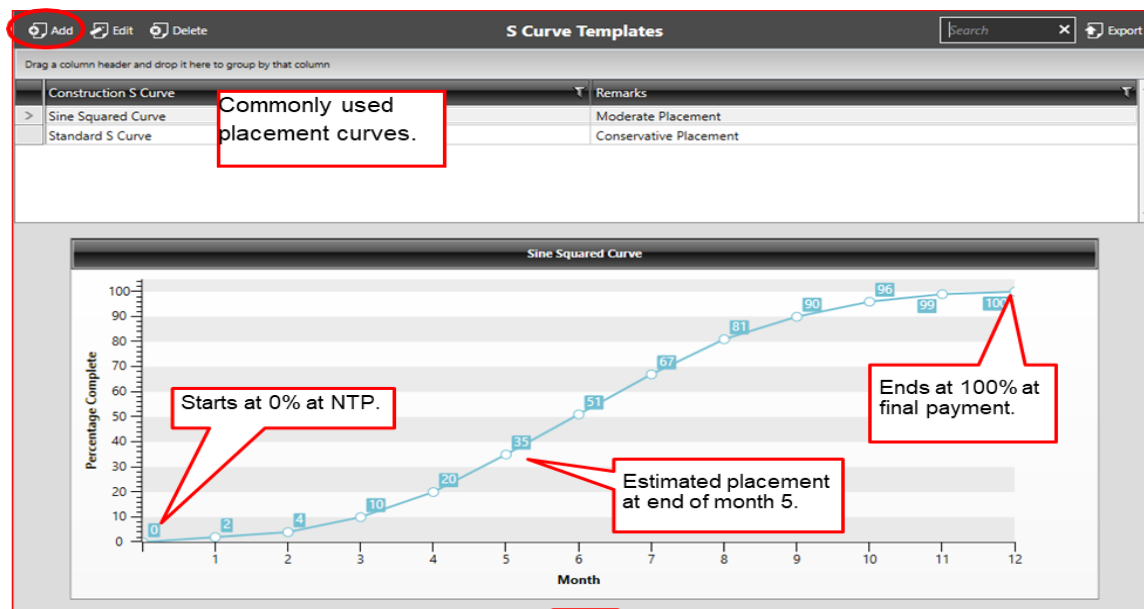
### 3.3.16 Construction S Curves

District Library Menu			
 <h2>Baltimore District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

This module contains the definitions of the Placement Curve Templates that are used in [Schedules | Placement Schedule](#) to calculate a contract's placement projection. RMS includes two of these curves but also allows the addition of other curve templates that may be better suited for a contract's estimated progression.

Curves are often used to project a contract's placement in lieu of using the Contractor's Activity Schedule and Schedule of Values. The curves estimate the value of the work that is anticipated to be billed monthly. The curves are defined by assigning a cumulative billing percentage to each month over a 12-month contract duration, starting at 0 and ending at 100. Using this basic definition, RMS extrapolates the monthly percentage using a contract's actual duration or other projected billing duration.

Click on [Add](#) to create a new curve template.



Enter a name for the new curve, then click on [OK](#).

RMS Add View

### Add S Curve Template

The following information is required to add a new S Curve Template

Title

### Construction S Curve Template

Construction S Curve Title

Remarks

**S Curve**

Graphic representation of the monthly projection.

Enter cumulative placements here.

Enter projected placement for a typical one-year construction contract

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
2	5	10	0	0	0	0	0	0	0	0	100

**Construction S Curve Title:** The title will carry forward from the previous entry, but it may be changed here. Do not change a curve's name after it is used on a contract.

**Remarks:** Enter a brief description of the curve to assist users in deciding which curve to use, i.e., Conservative, Design-Build, etc. This field is limited to 40 characters.

**Month:** For each month, enter a percentage representing the End-of-the-Month Estimated Cumulative Placement based on a 12-month duration. A graphic of the curve will build as each month's placement percentage is entered.

Once complete, click on the [Back](#) button twice to return to the [District Library Menu](#).

### 3.3.17 Dredging Waterways

District Library Menu			
<b>T2 Baltimore Test District Library</b> The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.			
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<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district</i>

Civil Works Districts can use this library to store features of the waterways for which the Districts are responsible to maintain. The waterways entered here make up the Lookup list from which selections are made in [Administration | Contract Setup | Dredging | Waterway System](#).

Click on [Add](#) to add a waterway to the library.

**Dredging Waterways**

Drag a column header and drop it here to group by that column

Code	Name
> PDW	Paul's Dredging Waterway
test	test

**RMS Add View**

**Add Dredging Waterway**

The following information is required to add a new Dredging Waterway

Name:

Default Datum:  Great Lakes Water Level  
Mean Low Water  
Mean Lower Low Water

Code:

**Name:** Enter the name of the waterway.

**Default Datum:** Select the applicable datum for this waterway from the drop-down list.

**Code:** Assign a code to the waterway. Click on **OK** when done.

**Waterway**

Name:

Default Datum:

Code:

**Dredge Waterway Features**

Feature Name | Advance Maintenance Depth | Project Depth | Allowable Depth



Click on **Add** to enter the feature(s) associated with the waterway.  
Select a **Feature Type** from the dropdown, then click on **OK**.

RMS Add View

**Add Dredge Waterway Feature**

The following information is required to add a new Dredge Waterway Feature

Feature Name:

Feature Type: 

- Anchorage
- Channel Extensions
- Other Feature Polygon
- Transit Channel Segment
- Turning Basins
- Wideners/Flairs



**T2 Baltimore Test District**  
56 Offices, 1,810 Staff, 1,127 Contracts

Government Mode Home | Contract Selection | Back | Refresh | Log Out | Help

**New waterway**

Feature Name:

**Depths (in feet)**

Datum:

Advance Maintenance Depth:  Project Depth:  Allowable Depth:

**Geometry**

Feature Type:

Center Line (Optional) | Polygon

**Center Line**

Latitude | Longitude

Enter coordinates in the order necessary by clicking Add to describe a line depicting the centerline or polygon.

Use these buttons to move the selected pair if the coordinates are entered in the wrong order

**Comment**

Comments: Please document changes here.

**Change History**

Date of Entry	Employee ID
>	Unknown

**Feature Name:** The Feature Name previously entered may be changed here.

**Datum:** The Datum previously entered may be changed here.

**Advance Maintenance Depth:** Enter the Advance Maintenance Depth authorized for this waterway. Advance Maintenance is dredging to a specified depth and/or width beyond the Authorized Channel Dimensions in critical and fast shoaling areas to avoid frequent re-dredging and ensure the reliability and least overall cost of operating and maintaining the Project-Authorized Channel Dimensions.

**Project Depth:** Enter the Required Project Grade authorized for this waterway. This is the minimum depth specified by the Corps for each dredging project or specific reach within a project. Often it is the Federally Authorized Depth, but in some cases can be less or more (for example, when Advance Maintenance has been authorized). This is the minimum depth that all the material must be dredged to clear grade.

**Allowable Depth:** Enter the Paid Allowable Over Depth authorized for this waterway. Paid Allowable Over Depth Dredging (depth and/or width) is a construction design method for dredging that occurs outside the Required Authorized Dimensions and Advance Maintenance (as applicable) prism to compensate for physical conditions and inaccuracies in the dredging process and allow for efficient dredging practices.

**Feature Type:** The Feature Type previously entered may be changed here.

**Geometry Coordinates:** Select the **Center Line** or **Polygon** tab as appropriate for the selected Feature Type Geometry. Click on **Add** to enter the latitude and longitude coordinates that describe the selected geometry. Use the **Move Up** and **Move Down** buttons to change the order of the coordinates in order that the described line reads continuously from left to right or vice versa.


**Comment:** Whenever any of the above depths is changed, describe the reason for the change.

**Change History:** Each time any of the above depths is entered or changed, RMS will log when the change was made and by whom. Be sure to document the reason for the change in the **Comment** block.

Click on the **Back** button to enter another feature belonging to this waterway.

When done entering features, click on the **Back** button twice more to return to the **District Library Menu**.

### 3.3.18 Query Definitions

District Library Menu			
 <h2>T2 Baltimore Test District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
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Use this module to create and store SQL queries for use in [Custom Reports](#) or to execute on the fly for results that can be quickly exported to a tabular report. It is not intended to be used by the average user. It requires familiarity with SQL and the RMS database neither of which are covered in this User Guide. The following is only a description of how to add a query to the library.

Query Definitions		
Query Name	Title of the Query	Name of Author
> QRYD_EstimatedDurationPaul	Test	Pa...
QRYD_VA_QAR	VA Contracts QA Daily Report data	Mi...
QRYD_FR_A0	Fast Reports check for A0	Ja...

This is a shareable item in [System Library | RMS Asset Store](#).

All District queries begin with “QRYD\_”. RMS automatically inserts these characters. Do not delete or change. Add a name for the query after the underscore, then click on **OK**. Limit the name to 27 characters, no spaces.

**Recommendation:** Use a name that is somewhat descriptive of the data retrieved by the query. Instead of spaces, use the underscore character to separate parts of the name.

RMS Add View

### Add

The following information is required to add a new

Query Name:

Title of the Query:



Query Definition

Query Name:

Title of the Query:

Report Description:

SQL Text of the query:

ID	Title	Type	Default
<input type="text" value="duration"/>	<input type="text" value="Contract Duration"/>	<input type="text" value="int"/>	<input type="text" value="1000"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**Title of the Query:** The title previously entered may be changed here.

**Report Description:** Describe what the query is for, how it should be used, parameters, etc.

**SQL Text of the Query:** Enter the query in SQL.

**Note:** To find the field and table names, users can use the [Information Overlay View](#) or the RMS Data Dictionary Report in the District Library.

**Parameters:** Use this section to enter default responses when the query requires user input.

**Execute Query:** Click on this button to execute the query. The results will be displayed in a table which can be exported outside of RMS using the [Export](#) icon.

USACE - RMS  
System Information

Government Mode Home  
Contract Selection

Back Refresh Log Out Help

Query Results

Drag a column header and drop it here to group by that column

Search


CONTRACT_ID	CONT_NO	LONG_TITLE	EST_DURATION
E1000581	DACA31-01-D-0029	Spring Valley TCRA [P2-110085] New Text Another Line 014	3935
E1000771	W912DR-06-C-0031	Book Storage Facility Modules 3 & 4	1043

**Note:** If the query has parameters, then before the query displays, it will ask the user to input the parameters. After parameters have been entered, click on the [Execute Query](#) button at the bottom to continue to the Query Results page.

The screenshot shows the 'USACE - RMS System Information' interface. At the top right, there are navigation buttons: 'Government Mode Home', 'Contract Selection', 'Back', 'Refresh', 'Log Out', and 'Help'. The main content area is titled 'Query Parameter Entry'. Below this, there is a section for 'Contract Duration' with a text input field containing the value '1000'. At the bottom of the form, there is a red-bordered button labeled 'Execute Query' with a red arrow pointing down to it.

Click on the [Back](#) button three times to return to the [District Library Menu](#).

### 3.3.19 Document Signature Positions

District Library Menu			
 <h2>T2 Baltimore Test District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
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This library contains all the positioning information for placing electronic signatures in RMS documents. The signature locations for all the documents created in RMS are defined here.

When signing any of these documents and prompted to place a signature, do not change the Default location.

**Document Signature Positions**

Drag a column header and drop it here to group by that column

Title
First Page - Top Left
First Page - Top Right
First Page - Bottom Left
First Page - Bottom Right
Last Page - Top Left
Last Page - Top Right
Last Page - Bottom Left
Last Page - Bottom Right
Civil QC Report - QC Representative
Civil QC Report - Superintendent
Military QC Report - QC Representative
Military QC Report - Superintendent
Civil QA Report - QA Representative
Civil QA Report - RE/Project Engineer
Military QA Report - QA Representative
Military QA Report - RE/Project Engineer
ENG93 - Preparer
ENG93 - Approver/COR
BCD - Requestor
BCD - Recommender
BCD - Approver
RFI - QA Reviewer
ENG 4025 - Certifier (Contractor)
ENG 4025 - Approver (Government)
Exposure Hours Report - Submitter (Contractor)
> Prompt Payment - Certifier (Contractor)

Standard positions. Cannot be edited or deleted. Can only be selected as a Default position.

Fixed positions in programmed RMS Reports cannot be edited or deleted.

**Document Signature Position**

Title

NOTE: The default signature position is used as an initial default position for signatures on generic documents not created directly by RMS. The default can be changed during the signature process as needed.

This Document Signature Position is NOT the Default

Print on Page

Print at Position

Signature mode indicator

**Title:** Enter a title that is descriptive of where this signature position should be used, up to 60 characters.

**Make Default:** Click on this button to make this position the Default position.

Use the following 3 selections to describe where in the document to place a signature:

**Print on Page:** Selects the page.

- Specific Page Number
- Last Page - minus optional offset
- New Page - added after Last Page

**Print at Position:** Location on the selected page. Select **Specific Position** to place at a position other than top or bottom.

- Top Left
- Top Middle
- Top Right
- Bottom Left
- Bottom Middle
- Bottom Right
- Specific Position



**Signature Mode Indicator:** Use to indicate Government or Contractor Signature positions.

- Contractor Signature Position For Contractor’s signature
- Shared Signature Position For either Contractor or Government signature
- Government Signature Position For Government signature

Click on the **Back** button twice to return to the **District Library Menu**.

### 3.3.20 Contract Locations

**District Library Menu**

## T2 Baltimore Test District Library

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<b>Contract Groups</b> <small>Group titles with group types at a District level.</small>	<b>Custom Reports</b> <small>Custom Reports for the District.</small>	<b>Word Templates</b> <small>A collection of Word templates at the District level.</small>	<b>User Defined Macros</b> <small>Contract and Office level User Defined Entries for macros.</small>
<b>Letter Agency Codes</b> <small>Agencies and their respective Agency Codes.</small>	<b>Standard Text</b> <small>BCD, SF30, ENG93, and RFI Types and their descriptions.</small>	<b>QA/QC Reports</b> <small>Report types and their titles.</small>	<b>Features of Work</b> <small>A District level collection of Features of Work.</small>
<b>Three Phase Inspections</b> <small>Number of Preparatory, Initial, and Followup Checks for Features of Work.</small>	<b>Submittal Types</b> <small>District level collection of Submittal types, their abbreviations, and full titles.</small>	<b>District Milestones</b> <small>Event Phases, Milestone Events, and District level settings.</small>	<b>Claim/Dispute Events</b> <small>District level collection of Events for Contractor Claims and Disputes.</small>
<b>Contractor Trades</b> <small>A District level collection of Contractor Trades.</small>	<b>Labor Classifications</b> <small>Labor Classifications and their Occupational Codes.</small>	<b>Work Categories</b> <small>A District level collection of Work Category Codes.</small>	<b>Construction S Curves</b> <small>S Curves, their remarks, and Hannum Curve.</small>
<b>Dredging Waterways</b> <small>Waterway systems and Dredging features.</small>	<b>Query Definitions</b> <small>Queries developed at a District level.</small>	<b>Document Signature Positions</b> <small>Control exact locations of digital signatures.</small>	<b>Contract Locations</b> <small>List of contract locations in district</small>

Use this library to view the list of locations for the District’s contracts. All the contracts that have identified a Contract Location in Administration | Contract Description are listed here.

All Contract Locations						
Contracts						
Office Identifier	Contract/Delivery Order No.	Contract Title	Current Contract	Customer Type	Program Type	
E1000019	DACW31-00-C-0034	Tylerton Shoreline Project 1	\$2,627,015.25	OTHR	CON-GEN	
E1000019	DACA31-01-C-0009	Upgrade Canine Road	\$1,211,289.00	CIVIL	MILCON	
E1000016	DACW31-01-C-0016	Hudson Branch, Sec 14	\$390,515.00	OTHR	CON-GEN	
E1000026	DACA31-96-D-0026 0026	DECONTAMINATE BLDG SURFACE	\$0.00			
E1000019	DACA31-01-C-0022	Vehicle Control (Points) Access	\$1,990,693.34		MILCON	
E1000019	DACW31-01-C-0027	Anacostia River, Phase I, Pkg II	\$1,626,502.52	OTHR	CON-GEN	
E1000019	NAFFQ3-01-C-0001	Design/Build Family Travel Camp	\$3,676,286.42	ARMY	WFO	
E1000017	DACA31-01-C-0039	Design/Build Fire Station	\$1,912,450.00	ARMY	MILCON	
E1000019	DACA31-00-C-0018	Bldg 205, Fire Protection Upgrade	\$367,124.00	ARMY	MILCON	

### 3.4 System Library

Open this module to view the data libraries that are managed by HQUSACE and maintained by the RMS Center. With a few exceptions, the modules in this library are READ ONLY. Only District Administrators can edit some of the modules in this library.

**Note:** Custom Program Types and descriptions cannot be added by the District as these are controlled at an RMS system level.

**T2 Baltimore Test District**

56 Offices, 1,810 Staff, 1,127 Contracts

Government Mode Home
Back
Refresh
Log Out
Help

Local Office
District Office
District Library
System Library
Summary Reports
RMS GIS
User Settings
RMS Mobile
RMS Staff

T2 Baltimore Test District (including suboffices)	Favorites	Recent
All Contracts 1,123	E1000183 Design/Build Fire Station	E1000214 *** TEST ***
Future Contracts 214	DACA31-01-C-0039	W911XK20C0017
Awarded Contracts - Construction Not Complete 318		E1001660 Wideband Satellite Communications Center
Awarded Contracts - Final Payment Not Made 461		W912DR-11-C-0033 W9123820F0130
Construction Complete - Not Physical Complete 32		E1000183 Design/Build Fire Station
Construction Complete - Final Payment Not Made 143		DACA31-01-C-0039
Final Payment Made - Not Fiscal Complete 225		E1000065 UNDERGROUND TANK UPGRADE
Fiscal Complete Contracts 223		DACA31-95-D-0083



## System Library Menu

### RMS System Library

The RMS System Library contains the modules maintained by the RMS Center. These modules (libraries) include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. The first three modules can be tailored to include only items applicable for your District.

<b>RMS Asset Store</b> <small>RMS Resources such as reports, queries, templates and contract groups from other districts.</small>	<b>Fund Types</b> <small>Appropriation categories used to execute an acquisition program provided by Congress.</small>	<b>Program Types</b> <small>Designator used to identify Mission of a program. Used with the Fund Type.</small>	<b>Contract Status Codes</b> <small>Designator to keep Managers aware of state of contract or action.</small>
<b>Primary Delay Codes</b> <small>Provides explanation of impacts to contract completion or action.</small>	<b>Mod Reason Codes</b> <small>Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.</small>	<b>FAR References</b> <small>Prescribed authorization for acquisitions or issuance of Contract Modifications.</small>	<b>Agency Codes</b> <small>Designator for the Agency that initiates a Contract action, such as a Modification.</small>
<b>Specification Sections</b> <small>SpecInTact MasterFormat numbering system of the NASA Specification Production System.</small>	<b>PD<sup>2</sup> CLIN Units</b> <small>Units of measure used in our Procurement System (PD<sup>2</sup> = Procurement Desktop Defense).</small>	<b>Category Codes and Units</b> <small>Real Property Codes and Units used to Transfer Real Property to the Using Agency.</small>	<b>RMS Reports</b> <small>Reports developed, maintained and supported by the RMS Support Center.</small>
<b>Query Definitions</b> <small>Queries developed, maintained and supported by the RMS Support Center.</small>	<b>CEFMS Batch Download Times</b> <small>List of CEFMS download times, all districts</small>	<b>Controlled Unclassified Information Policy</b> <small>List of additional CUI resources and policy documents</small>	

The **System Library** menu consists of the following:

**RMS Asset Store:** This module can be used to share the following types of information between Districts: Contract Groups, Custom Queries, Document Templates, Report Templates, Standard Text, and User Roles.

**Fund Types:** Alphanumeric codes used to identify the intended use of appropriated funds.

**Program Types:** Abbreviations used to identify the program under which funds have been provided. The program type should be associated with the contract's funding accounts.

**Contract Status Codes:** Alphanumeric codes used to quickly identify where a contract is in terms of its progress, or lack thereof.

**Primary Delay Codes:** Alphanumeric codes used to quickly identify the reason why a contract is behind schedule.

**Mod Reason Codes:** Alphanumeric codes used to indicate the justification, explanation, and/or necessity for the issuance of a Planning, Design, or Construction Change Request.

**FAR References:** List of FAR clauses typically included in construction contracts.

**Agency Codes:** Codes used to identify the party responsible for initiating a Contract Change Request.

**Specification Sections:** The Construction Specifications Institute's (CSI) Master Format is the most widely used standard for organizing specifications for building projects in the U.S. and Canada. The format of the section numbers has changed over time. This library includes the section numbers in the formats used in the 1995, 2004, and 2014 Master Format editions.

**PD<sup>2</sup> CLIN Units:** Units of measure recognized by PD<sup>2</sup> and CEFMS. When setting up bid/proposals or new CLINs in modifications, only use the measurement units as defined in this list to ensure compatibility with PD<sup>2</sup> and CEFMS.

**Category Codes and Units:** Five or Six-digit numbers used by the Army, Navy, and Air Force to classify a specific category of Real Property assets; used when preparing the DD1354.

**RMS Reports:** A list of all the reports developed by the RMS Center.

**Query Definitions:** A list of SQL queries managed by the RMS Center for use in various reports.

**CEFMS Batch Download Times:** The scheduled daily download time for batch downloads from CEFMS to RMS for each District.

**Controlled Unclassified Information Policy:** Links to the DoD Instruction 5200.48 Controlled Unclassified Information (CUI), the official DoD CUI Implementation Policy, and the HQUSACE SOP located under the USACE KMP portal can be found here for reference.

### 3.4.1 RMS Asset Store

 <b>RMS System Library</b> The RMS System Library contains the modules maintained by the RMS Center. These modules (libraries) include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. The first three modules can be tailored to include only items applicable for your District.			
<b>RMS Asset Store</b> <i>RMS Resources such as reports, queries, templates and contract groups from other districts.</i>	<b>Fund Types</b> <i>Appropriation categories used to execute an acquisition program provided by Congress.</i>	<b>Program Types</b> <i>Designator used to identify Mission of a program. Used with the Fund Type.</i>	<b>Contract Status Codes</b> <i>Designator to keep Managers aware of state of contract or action.</i>
<b>Primary Delay Codes</b> <i>Provides explanation of impacts to contract completion or action.</i>	<b>Mod Reason Codes</b> <i>Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.</i>	<b>FAR References</b> <i>Prescribed authorization for acquisitions or issuance of Contract Modifications.</i>	<b>Agency Codes</b> <i>Designator for the Agency that initiates a Contract action, such as a Modification.</i>
<b>Specification Sections</b> <i>SpecInTact MasterFormat numbering system of the NASA Specification Production System.</i>	<b>PD<sup>2</sup> CLIN Units</b> <i>Units of measure used in our Procurement System (PD<sup>2</sup> = Procurement Desktop Defense).</i>	<b>Category Codes and Units</b> <i>Real Property Codes and Units used to Transfer Real Property to the Using Agency.</i>	<b>RMS Reports</b> <i>Reports developed, maintained and supported by the RMS Support Center.</i>
<b>Query Definitions</b> <i>Queries developed, maintained and supported by the RMS Support Center.</i>	<b>CEFMS Batch Download Times</b> <i>List of CEFMS download times, all districts</i>	<b>Controlled Unclassified Information Policy</b> <i>List of additional CUI resources and policy documents</i>	

Using this module, Districts can share certain library elements (Assets) with each other. Items included in this library module by one District can be copied by another District to its District library. Once copied, the item is editable from within the copying District's library and tailorable to its specific need. Only District Administrators have access to this module to both place an item in the library and to copy an item to its own library.

#### 3.4.1.1 RMS Assets Summary Screen

There are 6 types of shareable assets, stored in these associated libraries.

- [District Library | Contract Groups](#)
- [District Library | Query Definitions](#)
- [District Library | Word Templates](#)
- [District Library | Custom Reports](#)
- [District Library | Standard Text](#)
- [District Office | Contract User Roles](#)

Upon opening the RMS Asset Store, a list of all assets available will be displayed. To view the list of available shared assets corresponding to any of the types listed above, click on the corresponding blue tile. A filtered list of the type selected will be displayed in the table below.

Click on [Add](#) to include another asset in the Asset Store.

The RMS Asset store is a USACE wide repository for sharing assets between districts. Full district administrators can share assets such as report templates, document templates and user roles from their RMS district. An RMS user with write permissions for the associated area can copy these assets into their own district.

**All Assets** 340    **Contract Groups** 15    **Custom Queries** 186    **Document Templates** 18    **Standard Text** 21    **User Roles** 4    **Report Templates** 93

**All Assets**    Add    Edit    Delete    Search    Export

Drag a column header and drop it here to group by that column

Asset Type	Title	Source District	Author	Last Updated
Report Template	Zero Dollar CLINs	BALTIMORE DISTRICT (E1)	Joh	11/18/2021
Custom Query	Zero Dollar CLINs	BALTIMORE DISTRICT (E1)	Joh	11/18/2021
Document Template	WPAO Price Negotiation Memorandum (PNM)	LOUISVILLE DISTRICT (H2)	Chr	04/14/2021
Document Template	WPAO Pre Negotiation Objective Memorandum (POM)	LOUISVILLE DISTRICT (H2)	Chr	04/22/2021

### Add item to RMS Asset Store

Select the type of asset you would like to add from the available options below.

- Add existing Contract Group to RMS Asset Store
- Add existing Custom Query to RMS Asset Store
- Add existing Document Template to RMS Asset Store
- Add existing Report Template to RMS Asset Store
- Add existing Standard Text to RMS Asset Store
- Add existing User Role to RMS Asset Store

Select the type of asset to copy and add to the Asset Store. Then, click on [Next](#).

< Back    **Next >**    Cancel



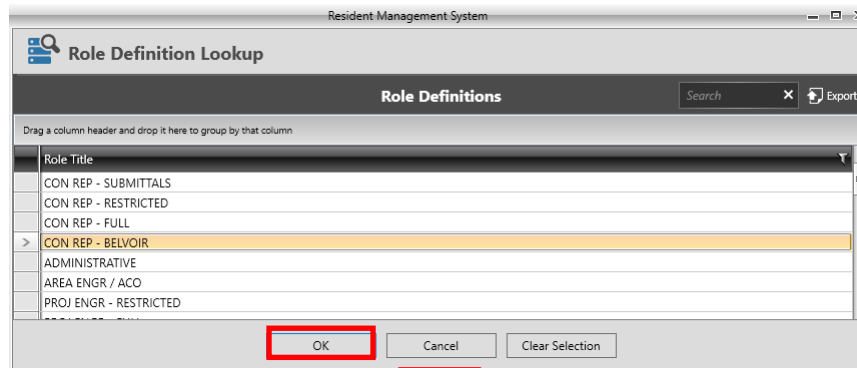
### Add item to RMS Asset Store

Use the lookup tile below to select a User Role to be added to the RMS Asset store for sharing with other districts.

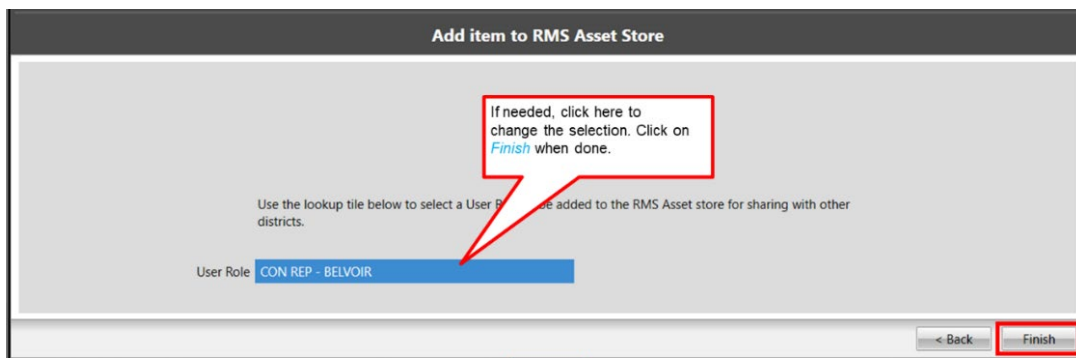
User Role: <Not Set>

Click here to view the Lookup table associated with the selected asset type.

Select the item to copy from the lookup table, then click on **OK**.



To confirm the selected item to copy, click on *Finish*. Otherwise, to change the item, click on the blue box and select another item from the *Lookup* table, then click on *Finish*.



RMS Asset Store Item - User Role

Title: CON REP - BELVOIR

Author:

Source District: RMS CENTER TEST WPC-2

Description: Full description of asset including instructions for use and explanation of the actual contents of the asset.

This asset can be copied and made available for use within your local RMS district. After the asset is copied into your district, it can be adapted and modified as needed for use in your district. To copy this asset into [RMS CENTER TEST WPC-2 (T2:E1)], use the copy button below.

Copy this Asset into RMS District

RMS Asset - Authorized Actions as District Administrator

As a district administrator for [RMS CENTER TEST WPC-2 (T2:E1)] you are able to edit the information for this asset in the above data fields. You can also refresh this asset from its original source by clicking the refresh button below.

Refresh from Original Source

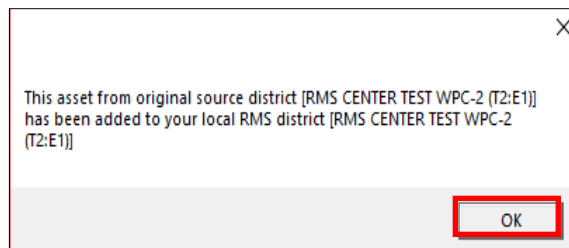
*Title*: RMS automatically inserts the same title as the copied asset. However, it may be changed here.

**Author:** RMS automatically inserts the name of the logged in user. However, it may be changed here.

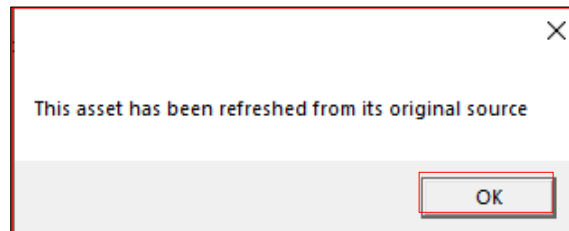
**Source District:** This is the District that owns the original of the copied asset. This is the only District that can edit the copy of the asset that is in the library. Direct questions regarding the asset to the District Administrator of this District.

**Description:** Use this area to describe the asset, how to use it, tailoring requirements, etc.

**Copy this Asset into RMS District:** Click this button to copy the asset to the District's library. Once copied, the asset can be edited in that particular library to customize it for specific use.




**Refresh from Original Source:** When the District that owns the original of the copied asset makes changes to the asset, clicking on this button will update the copy to incorporate all changes made since the asset was placed in the library.



Click on the **Back** button twice to return to the **System Library** menu.

### 3.4.2 Fund Types

 <b>RMS System Library</b> The RMS System Library contains the modules maintained by the RMS Center. These modules (libraries) include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. The first three modules can be tailored to include only items applicable for your District.			
<b>RMS Asset Store</b> <i>RMS Resources such as reports, queries, templates and contract groups from other districts.</i>	<b>Fund Types</b> <i>Appropriation categories used to execute an acquisition program provided by Congress.</i>	<b>Program Types</b> <i>Designator used to identify Mission of a program. Used with the Fund Type.</i>	<b>Contract Status Codes</b> <i>Designator to keep Managers aware of state of contract or action.</i>
<b>Primary Delay Codes</b> <i>Provides explanation of impacts to contract completion or action.</i>	<b>Mod Reason Codes</b> <i>Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.</i>	<b>FAR References</b> <i>Prescribed authorization for acquisitions or issuance of Contract Modifications.</i>	<b>Agency Codes</b> <i>Designator for the Agency that initiates a Contract action, such as a Modification.</i>
<b>Specification Sections</b> <i>SpecInTact MasterFormat numbering system of the NASA Specification Production System.</i>	<b>PD<sup>2</sup> CLIN Units</b> <i>Units of measure used in our Procurement System (PD<sup>2</sup> = Procurement Desktop Defense).</i>	<b>Category Codes and Units</b> <i>Real Property Codes and Units used to Transfer Real Property to the Using Agency.</i>	<b>RMS Reports</b> <i>Reports developed, maintained and supported by the RMS Support Center.</i>
<b>Query Definitions</b> <i>Queries developed, maintained and supported by the RMS Support Center.</i>	<b>CEFMS Batch Download Times</b> <i>List of CEFMS download times, all districts</i>	<b>Controlled Unclassified Information Policy</b> <i>List of additional CUI resources and policy documents</i>	

The **Fund Types** module can be used to shorten the lookup table and limit the Fund Type selections in the District. Place a check in the checkbox for each Fund Types to include in District selections.

Click on the [Back](#) button to return to the [System Library](#) menu.

Fund Types				Search	Export
Fund Type	Description	Program	Include in Lookup		
0F	Base Closure Program, Army FY05 (Army BRAC2005)	Army	<input checked="" type="checkbox"/>		
0G	Base Closure Program, Air Force FY05 (AF BRAC2005)	Air Force	<input checked="" type="checkbox"/>		
0H	Base Closure Program, DOD FY05 (DOD BRAC 2005)	DOD	<input checked="" type="checkbox"/>		
0I	Base Closure Program, Navy FY05 (Navy BRAC 2005)	Other	<input type="checkbox"/>		
0J	O&M Army BRAC05	Army	<input type="checkbox"/>		
0K	O&M Air Force BRAC05	Air Force	<input type="checkbox"/>		
0M	O&M Navy BRAC05	Other	<input type="checkbox"/>		
10	Military Construction, Army	Army	<input checked="" type="checkbox"/>		
11	Military Construction, Army - Minor Construction	Army	<input checked="" type="checkbox"/>		

### 3.4.3 Program Types

## RMS System Library

The RMS System Library contains the modules maintained by the RMS Center. These modules (libraries) include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. The first three modules can be tailored to include only items applicable for your District.

<b>RMS Asset Store</b> <i>RMS Resources such as reports, queries, templates and contract groups from other districts.</i>	<b>Fund Types</b> <i>Appropriation categories used to execute an acquisition program provided by Congress.</i>	<b>Program Types</b> <i>Designator used to identify Mission of a program. Used with the Fund Type.</i>	<b>Contract Status Codes</b> <i>Designator to keep Managers aware of state of contract or action.</i>
<b>Primary Delay Codes</b> <i>Provides explanation of impacts to contract completion or action.</i>	<b>Mod Reason Codes</b> <i>Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.</i>	<b>FAR References</b> <i>Prescribed authorization for acquisitions or issuance of Contract Modifications.</i>	<b>Agency Codes</b> <i>Designator for the Agency that initiates a Contract action, such as a Modification.</i>
<b>Specification Sections</b> <i>SpecsInTact MasterFormat numbering system of the NASA Specification Production System.</i>	<b>PD<sup>2</sup> CLIN Units</b> <i>Units of measure used in our Procurement System (PD<sup>2</sup> = Procurement Desktop Defense).</i>	<b>Category Codes and Units</b> <i>Real Property Codes and Units used to Transfer Real Property to the Using Agency.</i>	<b>RMS Reports</b> <i>Reports developed, maintained and supported by the RMS Support Center.</i>
<b>Query Definitions</b> <i>Queries developed, maintained and supported by the RMS Support Center.</i>	<b>CEFMS Batch Download Times</b> <i>List of CEFMS download times, all districts</i>	<b>Controlled Unclassified Information Policy</b> <i>List of additional CUI resources and policy documents</i>	

The [Program Types](#) module can be used to shorten the lookup table and limit the Program Type selections in the District. Place a check in the checkbox for each Program Type to include in District selections.

Click on the [Back](#) button to return to the [System Library](#) menu.

Program Types			Search	Export
Program Type	Description	Include in Lookup		
> AIF	Afghanistan Infrastructure Fund	<input checked="" type="checkbox"/>		
ANA	Afghan National Army	<input checked="" type="checkbox"/>		
ANA-I	Afghan National Army - Infrastructure	<input checked="" type="checkbox"/>		
ANA-O&M	Afghan National Army-Operation and Maintenance	<input checked="" type="checkbox"/>		
ANA-S	Afghan National Army - Sustainment	<input checked="" type="checkbox"/>		
ANP	Afghan National Police	<input checked="" type="checkbox"/>		
ANP-I	Afghan National Police - Infrastructure	<input checked="" type="checkbox"/>		
ANP-O&M	Afghan National Police-Operation and Maintenance	<input checked="" type="checkbox"/>		
ANP-S	Afghan National Police - Sustainment	<input checked="" type="checkbox"/>		
BMICNP	Border Management Initiative/Counter Narcotics Program	<input checked="" type="checkbox"/>		
BRAC	Base Realignment and Closure	<input checked="" type="checkbox"/>		

**Note:** Custom Program Types and descriptions cannot be added by the District, as these are controlled at an RMS system level.

### 3.4.4 Contract Status Codes

Code	Contract Status
1	Impacted by Epidemic/Pandemic
3	Facility Accepted by Using Service - Without Deficiencies
4	Facility Accepted by Using Service - With Deficiencies
5	Final Pay to Contractor Made
6	Correction of Deficiencies Physically Completed
7	Project Fiscally Complete
8	Construction Deferred or Suspended

As mentioned at the beginning of section 3.4, this section is a list of alphanumeric codes used to quickly identify where a contract is in terms of its progress, or lack thereof. The Contract Status Codes are used for upward reporting to PROMIS. These codes are used and found in the [Administration](#) tab | [Contract Status](#) module | [Phase – Status/Issues](#) tab within a contract. This list cannot be edited or changed.

### 3.4.5 Primary Delay Codes

Code	Primary Delay
Z1	COVID-19 KTR Initiated Actions
Z2	COVID-19 Government Initiated Actions
Z3	COVID-19 Material/Worker Shortage
Z4	Residual Impacts
A0	Constn Auth. Not Received From Customer
A1	Constn Auth. Not Received From House

As mentioned at the beginning of section 3.4, this section is a list of alphanumeric codes used to quickly identify the reason why a contract is behind schedule. The Primary Delay Codes are used for upward reporting for PROMIS. This list cannot be edited or changed.

### 3.4.6 Mod Reason Codes

Code	Mod Reason
1	Engineering Changes
4	User Changes, Discretionary
5	Contract Options
6	Miscellaneous Changes
7	Differing Site Conditions
8	Value Engineering Change
9	Administrative Change
A	Adverse Security Conditions
E	Excusable Delay for No Fault
G	Government Furnished Property
I	Incremental Definitization of Work

As mentioned at the beginning of section 3.4, this section is a list of alphanumeric codes used to indicate the justification, explanation, and/or necessity for issuance of a Planning, Design, or Construction Change Request.

**Note:** It is important to note, that Reason Codes I (capital letter I) and 5 will add or subtract additional days to the Original Award Duration depending on the days in the Mod. This is important because it will not only change the length of the contract, but also change the Award Duration, which may not be what the user expects or wants. Please see Vol 2, for the Mod Reason Codes under the **Things to Consider** section for a more detailed explanation.

### 3.4.7 FAR References

Type	Paragraph	Clause Date	Title
FAR	52.236-3	APR 1984	SITE INVESTIGATION AND CONDITIONS AFFECTING THE WORK
FAR	52.236-5	APR 1984	MATERIAL AND WORKMANSHIP
FAR	52.236-9	APR 1984	PROTECTION OF EXISTING VEGETATION, STRUCTURES, EQUIP...
FAR	52.242-14	APR 1984	SUSPENSION OF WORK
FAR	52.243-2-AIII	AUG 1987	CHANGES - COST REIMBURSEMENT - ALTERNATE III
FAR	52.243-4	AUG 1987	CHANGES
FAR	52.243-5	APR 1984	CHANGES AND CHANGES CONDITIONS

This library contains FAR references to include on the SF30 Modification forms. There may also be DFAR and EFARS clauses included if desired. This library is maintained in the [System Library](#), and the FAR references are used on the SF30 Block 13 lookup box in the [Contract Modifications](#) module.

**Note:** Engineer Federal Acquisition Regulation Supplement (EFARS) is rescinded by the USACE Acquisition Instruction which was issued by USACE Head of Contracting Activity on March 18, 2013. EFARS can be referenced, as necessary, for any contracts issued before March 18, 2013.

### 3.4.8 Agency Codes

Code	Originating Agency
C	C - Corps of Engineers (All Levels)
E	E - Environmental Protection Agency (EPA)
K	K - Contractor (Claim & Suggested Changes)
P	P - Potential Responsible Party (PRP)

Agency Codes are codes used to identify the originating agency responsible for initiating a contract Change Request. This list is not editable and is only for user reference.

### 3.4.9 Specification Sections

Section	Section Name
00100	Instruction To Bidders
00200	Bid/Proposal Form
00200A	Another Test Created in Gov Lib
00250	Construction Agreement

The Specification Sections are listed here, in the District Library to help ensure consistency between contract specifications from all offices within the District. The data is used to create the Submittal Register (ENG Form 4288) for each contract. If SpecsIntact is being used, the same section numbers should also be used. There are three master lists to choose from and each is listed under the tab for that master list: MasterFormat 1995, MasterFormat 2004, MasterFormat 2014, and MasterFormat 2016. Click on each tab to view the lists for each type of MasterFormat. As with all data in the **System Library**, this data is not editable.

### 3.4.10 PD<sup>2</sup> CLIN Units

PD <sup>2</sup> CLIN Units	
Drag a column header and drop it here to group by that column	
Unit	Title
EZ	Feet and Decimal
F1	Thousand Cubic Feet Per Day
F4	Fold
F9	Fibers/Cubic Centimeter of Air
FA	Fahrenheit
FB	Fields

This is the list of units of measurement used in the Procurement System (PD<sup>2</sup> = Procurement Desktop Defense) for CLINs. These units of measurement are recognized by both PD<sup>2</sup> and CEFMS. When setting up Bid/Proposal or new CLINs in Modifications, only use the measurement units as defined in this list to ensure compatibility with PD<sup>2</sup> and CEFMS. This data is READ-ONLY and cannot be changed.

### 3.4.11 Category Codes and Units

This is the list that is used for setting the Real Property Category Codes during contract Closeout. These codes are five or six-digit numbers used by the Army, Navy, Air Force, and Washington Headquarters Services to classify a specific category of real property assets used when preparing the DD1354. Click on each tab to see the codes specific to each listed branch of the Military or the last tab to see the Units of Measure associated with Real Property Assets. Each of these items come from the respective branches listed in the tabs and are only added or changed by those branches.

1354 Category Codes and Units				
ARMY-Category Codes	NAVY-Category Codes	USAF-Category Codes	WHS-Category Codes	Units of Measure
ARMY 1354 Category Codes				
Drag a column header and drop it here to group by that column				
Category Codes	Short Title	Unit 1	Unit 2	Description
11110	Fixed-Wing Runway, Surfaced	SY	LF	Fixed Wing Runway, Paved
11111	Runway, Unsurfaced	SY	LF	Runway / Fixed Wing - Unsurfaced
11120	Rotary-Wing Landing Area, Surfaced	SY		Rotary Wing Runway, Paved
11121	Runway, Unsurfaced	SY	LF	Rotary Wing Runway, Unpaved

Any questions regarding specific category codes should be directed to the branch that code stems from. As with all areas in the System Library, these lists are READ-ONLY and cannot be changed.

### 3.4.12 RMS Reports

Report Title	Author	Report Type	Report Menu
> 18ft Barrier Completion Schedule	RMS Center	D	SCHEDULE
30ft Barrier Completion Schedule	RMS Center	D	SCHEDULE
Accrual Status	RMS Center	D	FINANCE
Action Items - Contractor	RMS Center	C	ADMIN
Action Items - Government	RMS Center	C	ADMIN
Action Items Govt - Summary	RMS Center	D	ADMIN
Active Prime Contractors	RMS Center	D	ADMIN
Activity Earnings by Invoice	RMS Center	C	FINANCE
Activity Schedule	RMS Center	C	SCHEDULE
Activity Schedule Comparison Report	RMS Center	C	SCHEDULE
Activity Schedule Relationships	RMS Center	C	SCHEDULE

This module shows the list of all the reports created by the RMS Support Center. It will show the Report Title, Author, Report Type (D = District or Summary Report; C = Contract Report), and the Report Menu, which shows where the report can be found within the Summary or Contract Reports modules. Again, this list is READ-ONLY and for user reference alone. Users with permissions to view the System Library are able to open up the individual reports to see some details, but again, all information is read only and for user reference.

**RMS Report**

Report Title:

Author:

Report Type:

Report Menu:

Report Description:

Record Guid:

Under Construction

Show in Government Mode

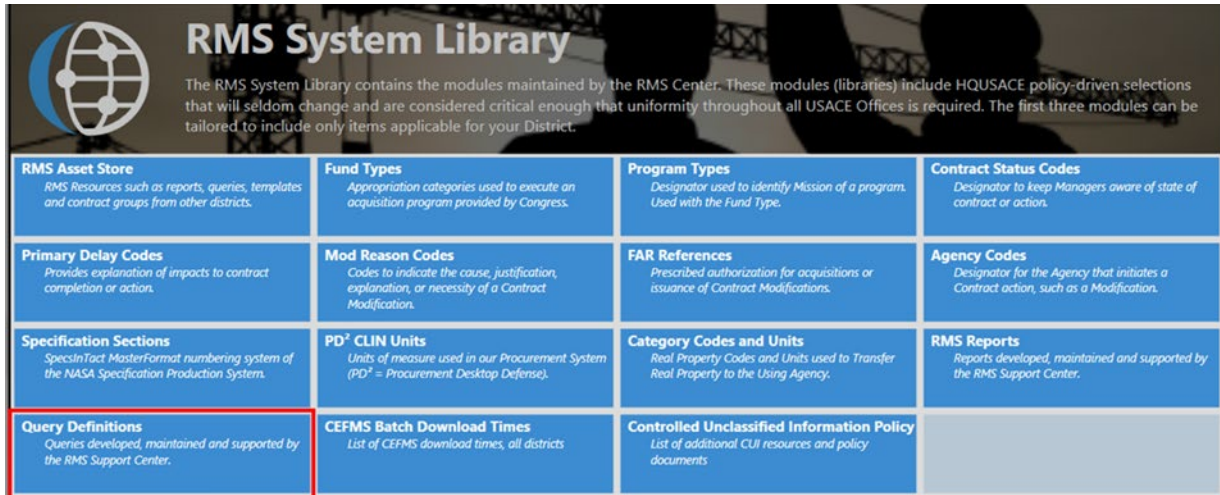
Show in Contractor Mode

Required Collections

Collection Name

Contract ID for Designer:

### 3.4.13 Query Definitions



**RMS System Library**

The RMS System Library contains the modules maintained by the RMS Center. These modules (libraries) include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. The first three modules can be tailored to include only items applicable for your District.

<b>RMS Asset Store</b> <i>RMS Resources such as reports, queries, templates and contract groups from other districts.</i>	<b>Fund Types</b> <i>Appropriation categories used to execute an acquisition program provided by Congress.</i>	<b>Program Types</b> <i>Designator used to identify Mission of a program. Used with the Fund Type.</i>	<b>Contract Status Codes</b> <i>Designator to keep Managers aware of state of contract or action.</i>
<b>Primary Delay Codes</b> <i>Provides explanation of impacts to contract completion or action.</i>	<b>Mod Reason Codes</b> <i>Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.</i>	<b>FAR References</b> <i>Prescribed authorization for acquisitions or issuance of Contract Modifications.</i>	<b>Agency Codes</b> <i>Designator for the Agency that initiates a Contract action, such as a Modification.</i>
<b>Specification Sections</b> <i>SpecInFact MasterFormat numbering system of the NASA Specification Production System.</i>	<b>PD* CLIN Units</b> <i>Units of measure used in our Procurement System (PD* = Procurement Desktop Defense).</i>	<b>Category Codes and Units</b> <i>Real Property Codes and Units used to Transfer Real Property to the Using Agency.</i>	<b>RMS Reports</b> <i>Reports developed, maintained and supported by the RMS Support Center.</i>
<b>Query Definitions</b> <i>Queries developed, maintained and supported by the RMS Support Center.</i>	<b>CEFMS Batch Download Times</b> <i>List of CEFMS download times, all districts.</i>	<b>Controlled Unclassified Information Policy</b> <i>List of additional CUI resources and policy documents.</i>	

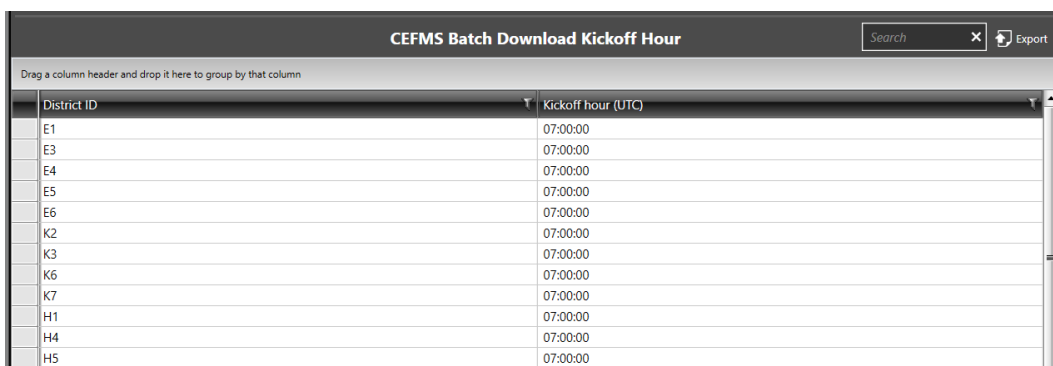
This module is used by the RMS Support Center to create and store SQL queries for use in Custom Reports or to execute as needed for results that can be quickly exported to a tabular report.

For information on how to use this module, see [District Library | Query Definitions](#).

All system queries begin with “QRY\_”. RMS automatically inserts these characters. Do not delete or change. Add a name for the query after the underscore, then click on **OK**. Limit the name to 27 characters, no spaces.

**Recommendation:** Use a name that is somewhat descriptive of the data retrieved by the query. Instead of spaces, use the underscore character to separate parts of the name.

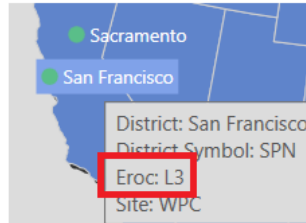
### 3.4.14 CEFMS Batch Download Times



District ID	Kickoff hour (UTC)
E1	07:00:00
E3	07:00:00
E4	07:00:00
E5	07:00:00
E6	07:00:00
K2	07:00:00
K3	07:00:00
K6	07:00:00
K7	07:00:00
H1	07:00:00
H4	07:00:00
H5	07:00:00

When a contract is set up to use CEFMS, it will go through a nightly download process, to get the most up-to-date information from CEFMS. This module provides the times for when each District does the automatic download from CEFMS in UTC time. The Districts are identified with the perspective EROC code, which is the first two characters of the Contract ID.

To determine the EROC for any District, from the Map View, hover the mouse over the District name and find the EROC entry. This can also be found in the District's main page, by looking at the Contract ID fields and picking the first two characters.



Contract/Delivery Order No.	Contract ID	Full Title of Contract
[REDACTED]	E100044	[REDACTED]

### 3.4.15 Controlled Unclassified Information Policy

## RMS System Library

The RMS System Library contains the modules maintained by the RMS Center. These modules (libraries) include HQUSACE policy-driven selections that will seldom change and are considered critical enough that uniformity throughout all USACE Offices is required. The first three modules can be tailored to include only items applicable for your District.

<b>RMS Asset Store</b> <i>RMS Resources such as reports, queries, templates and contract groups from other districts.</i>	<b>Fund Types</b> <i>Appropriation categories used to execute an acquisition program provided by Congress.</i>	<b>Program Types</b> <i>Designator used to identify Mission of a program. Used with the Fund Type.</i>	<b>Contract Status Codes</b> <i>Designator to keep Managers aware of state of contract or action.</i>
<b>Primary Delay Codes</b> <i>Provides explanation of impacts to contract completion or action.</i>	<b>Mod Reason Codes</b> <i>Codes to indicate the cause, justification, explanation, or necessity of a Contract Modification.</i>	<b>FAR References</b> <i>Prescribed authorization for acquisitions or issuance of Contract Modifications.</i>	<b>Agency Codes</b> <i>Designator for the Agency that initiates a Contract action, such as a Modification.</i>
<b>Specification Sections</b> <i>SpecsInTact MasterFormat numbering system of the NASA Specification Production System.</i>	<b>PD<sup>2</sup> CLIN Units</b> <i>Units of measure used in our Procurement System (PD<sup>2</sup> = Procurement Desktop Defense).</i>	<b>Category Codes and Units</b> <i>Real Property Codes and Units used to Transfer Real Property to the Using Agency.</i>	<b>RMS Reports</b> <i>Reports developed, maintained and supported by the RMS Support Center.</i>
<b>Query Definitions</b> <i>Queries developed, maintained and supported by the RMS Support Center.</i>	<b>CEFMS Batch Download Times</b> <i>List of CEFMS download times, all districts</i>	<b>Controlled Unclassified Information Policy</b> <i>List of additional CUI resources and policy documents</i>	

RMS includes some CUI Tools to assist project teams with CUI marking and handling requirements. Per DoD 5200.48 Section 5.3, Parts a. & b., contracts are required to identify whether any of the information in the contract is CUI and articulate the protective measures and dissemination controls in the contract. Each individual contract's CUI requirements must be identified while considering the unique project characteristics, project stakeholder resources, and official CUI policy and guidance.

### Controlled Unclassified Information Policy

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**Links**  
*NOTE: Some links are only accessible from within the government network*

- [DoD Instruction 5200.48 Controlled Unclassified Information \(CUI\)](#)
- [RMS Controlled Unclassified Information Standard Operating Procedure](#)

This **System Library** menu provides links to both the DoD Instruction 5200.48 Controlled Unclassified Information (CUI), the official DoD CUI Implementation Policy, and the HQUSACE SOP located under the USACE KMP Portal.

Contact the Contracting Officer, Administrative Contracting Officer, Contracting Officer Representative, and/or Project Manager for CUI guidance specific to the contract.

### 3.5 Summary Reports

Local Office	District Office	District Library	System Library	Summary Reports	RMS GIS	User Settings	RMS Mobile	RMS Staff
T2 Baltimore Test District (including suboffices) ...			Favorites		Recent			
All Contracts	1,039	E1002578 Submittal Training		E1002578 Submittal Training				
Future Contracts	174	W912GB19D0037 1234		W912GB19D0037 1234				
Awarded Contracts - Construction Not Complete	273			E1001660 Wideband Satellite Communications Center				
Awarded Contracts - Final Payment Not Made	411			W912DR-11-C-0033				
Construction Complete - Not Physical Complete	29			E1001667 Renovation of Building 1464				
Construction Complete - Final Payment Not Made	138			W912DR-09-D-0024 0008				
Final Payment Made - Not Fiscal Complete	225			E1002642 Correcting Wrong Obligations Tutorial				
Fiscal Complete Contracts	229			W9128F-16-C-0034				

All Reports	Administration Reports	Financial Reports	QA/QC Reports	Submittal Reports	Schedule Reports	Closeout Reports	Library Reports
90	33	11	6	5	11	0	24

Summary Reports			
Report Title	Report Menu	Author	Developed By
Accrual Status	FINANCE	RMS Center	RMS Center
Action Items Govt - Summary	ADMIN	RMS Center	RMS Center
Active Prime Contractors	ADMIN	RMS Center	RMS Center

Open this module to access the reports that include data results for more than one contract at a time. These reports can be executed to display results reflecting all the District's contracts or any defined subset of contracts. Each report has its own criteria for selecting the contracts to include.

The blue tiles correspond to the main data modules in RMS. The list of available Summary Reports corresponding to any of the main data modules can be seen by simply clicking anywhere in the corresponding blue tile. A filtered list of the reports selected will be displayed in the data grid below the tiles, as seen above.

To run a report, select the desired report and double click on it, or select the report and click on [Edit](#). Certain reports will open immediately, however, other reports may require data entry and/or selection before the report can be ran and viewed. If this is the case, the corresponding parameter screen will appear, similar to the screen shown below.

If needed, CUI markings can be added to any Summary Report by entering the desired text into the text box as shown below. A minimum of three characters must be entered.

**Contractor Personnel On Site**

**RMS District Report**

Preview Print

**Security Classification**

Enter CUI markings here to appear on the header and footer of the report

CU

**CUI Markings Text:**  
**WARNING** A minimum of 3 characters is required.

**Contracts to Include**

Contracts from Office **T2 Baltimore Test District**

Include Contracts from Sub-Offices

Contracts by Status  
 Check All  
 UnCheck All

Future Contracts  
 Awarded Contracts - Construction Not Complete  
 Awarded Contracts - Final Payment Not Made  
 Construction Complete - Not Physical Complete  
 Construction Complete - Final Payment Not Made  
 Final Payment Made - Not Fiscal Complete  
 Fiscal Complete Contracts

Individually Selected Contracts (NOTE: All Selected Contracts will be Included)  
 Contracts Selected from Contract Group

**Date**

All Dates  
 Selected Dates

**Sort**

Show Totals by Office and Month

Reports are added to this module by the RMS Support Center or by users through [Custom Reports](#) in the District Library module.

### 3.5.1 CUI Summary Report

A CUI Summary Report can also be generated in [Summary Reports](#). This report will provide a list of contracts based on the security classifications set for each contract.

Click on the [Summary Reports](#) module in the Contract Selection view and search for “CUI Summary Report”. Double click on the report to bring up the parameter view.

**CUI Summary Report**

**RMS District Report**

Preview Print

**Security Classification**

Enter CUI markings here to appear on the header and footer of the report

**Contracts to Include**

Contracts from Office **T2 Baltimore Test District**

Include Contracts from Sub-Offices

Contracts by Status  
 Check All  
 UnCheck All

Future Contracts  
 Awarded Contracts - Construction Not Complete  
 Awarded Contracts - Final Payment Not Made  
 Construction Complete - Not Physical Complete  
 Construction Complete - Final Payment Not Made  
 Final Payment Made - Not Fiscal Complete  
 Fiscal Complete Contracts

Individually Selected Contracts (NOTE: All Selected Contracts will be Included)  
 Contracts Selected from Contract Group

**Options**

Check All UnCheck All

CUI, Whole  
 CUI, In Part

None  
 Not Selected

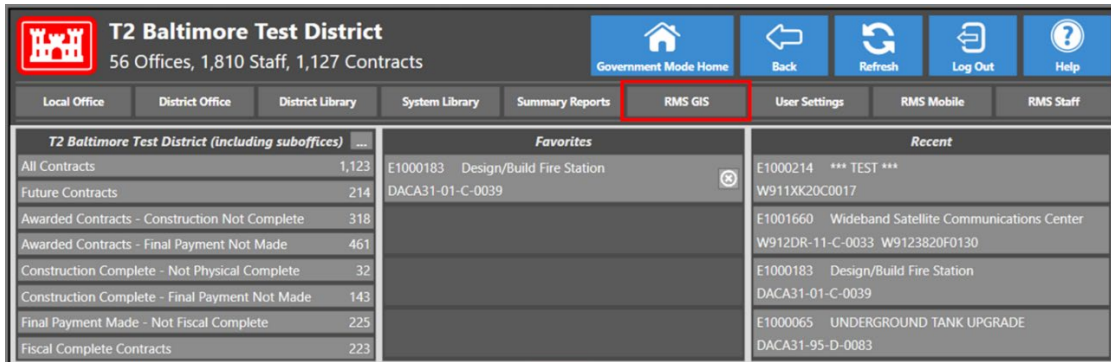
**Sort**

Sort Report by: Contract No.  
 Contract No.  
 Office

Make the appropriate selections for the desired contracts to display in the report.

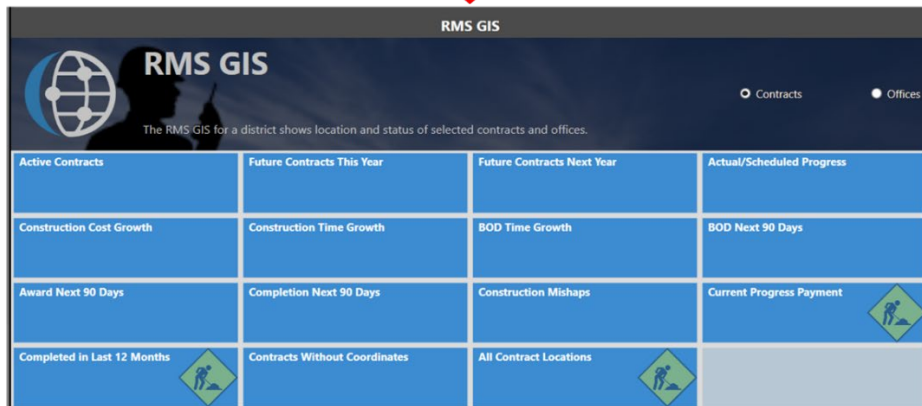
Security markings can also be added to the report, if needed, by entering the desired header/footer text into the textbox in the [Security Classification](#) section.

### 3.6 RMS GIS



The screenshot shows the RMS GIS interface for the T2 Baltimore Test District. The top navigation bar includes a home icon, back, refresh, log out, and help buttons. Below the navigation bar, the 'RMS GIS' tab is selected. The main content area is divided into three sections: 'T2 Baltimore Test District (including suboffices)', 'Favorites', and 'Recent'.

T2 Baltimore Test District (including suboffices)		Favorites		Recent	
All Contracts	1,123	E1000183	Design/Build Fire Station	E1000214	*** TEST ***
Future Contracts	214	DACA31-01-C-0039		W911XX20C0017	
Awarded Contracts - Construction Not Complete	318			E1001660	Wideband Satellite Communications Center
Awarded Contracts - Final Payment Not Made	461			W912DR-11-C-0033	W9123820F0130
Construction Complete - Not Physical Complete	32			E1000183	Design/Build Fire Station
Construction Complete - Final Payment Not Made	143			DACA31-01-C-0039	
Final Payment Made - Not Fiscal Complete	225			E1000065	UNDERGROUND TANK UPGRADE
Fiscal Complete Contracts	223			DACA31-95-D-0083	

The screenshot shows the RMS GIS tile view. The title is 'RMS GIS' and it includes a globe icon and a toggle for 'Contracts' and 'Offices'. Below the title, there is a description: 'The RMS GIS for a district shows location and status of selected contracts and offices.' The main content area is a grid of tiles:

Active Contracts	Future Contracts This Year	Future Contracts Next Year	Actual/Scheduled Progress
Construction Cost Growth	Construction Time Growth	BOD Time Growth	BOD Next 90 Days
Award Next 90 Days	Completion Next 90 Days	Construction Mishaps	Current Progress Payment
Completed in Last 12 Months	Contracts Without Coordinates	All Contract Locations	

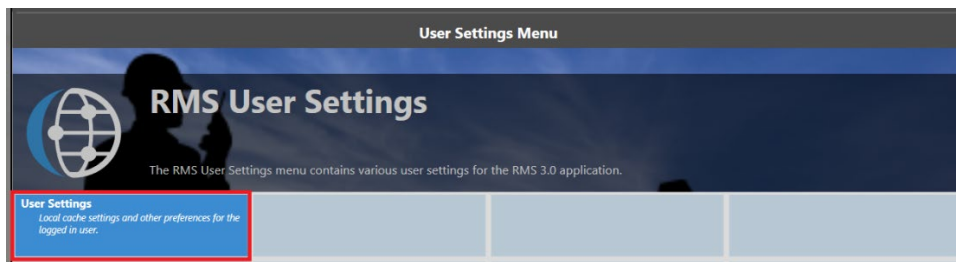
Use the tiles in this module to see a list of the contracts matching the tile's description along with the geographic location on a map. Only contracts in which coordinates have been set in [Administration | Contract Description](#) are included. Each of the lists contains selected contract data related to the tile's description. The contracts will be marked on the accompanying map by a green, yellow, or red dot. The colors correspond to the metrics associated with the tile's description.

For information on manipulating the map view, see section on [Contract Locations](#).

### 3.7 User Settings

Use this module to individualize how RMS will operate for the logged in user. These settings can be changed by the logged in individual or the System Administrator.

Local Office	District Office	District Library	System Library	Summary Reports	RMS GIS	User Settings	RMS Mobile	RMS Staff
T2 Baltimore Test District (including suboffices) ...			Favorites			Recent		
All Contracts	1,039		E1002578	Submittal Training		E1002578	Submittal Training	
Future Contracts	174		W912GB19D0037	1234		W912GB19D0037	1234	
Awarded Contracts - Construction Not Complete	273					E1001660	Wideband Satellite Communications Center	
Awarded Contracts - Final Payment Not Made	411					W912DR-11-C-0033		
Construction Complete - Not Physical Complete	29					E1001667	Renovation of Building 1464	
Construction Complete - Final Payment Not Made	138					W912DR-09-D-0024	0008	
Final Payment Made - Not Fiscal Complete	225					E1002642	Correcting Wrong Obligations Tutorial	
Fiscal Complete Contracts	229					W9128F-16-C-0034		

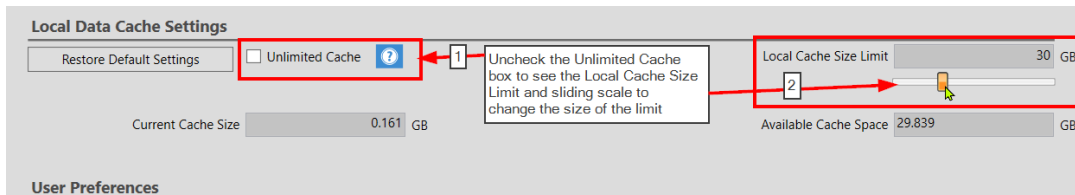


#### 3.7.1 Local Data Cache Settings

Cached data is a copy of live data that is maintained locally, generally for performance reasons, and allows users to quickly retrieve previously viewed data by accessing the cache memory instead of downloading the data again.

The default local cache size limit should be sufficient for most users. If needed however, this can be increased by moving the slide bar to the right. More is not necessarily better. The downside to cached data is that it takes up space. For most users, the 5 GB default limit will provide the most efficient and effective balance between speed and space used.

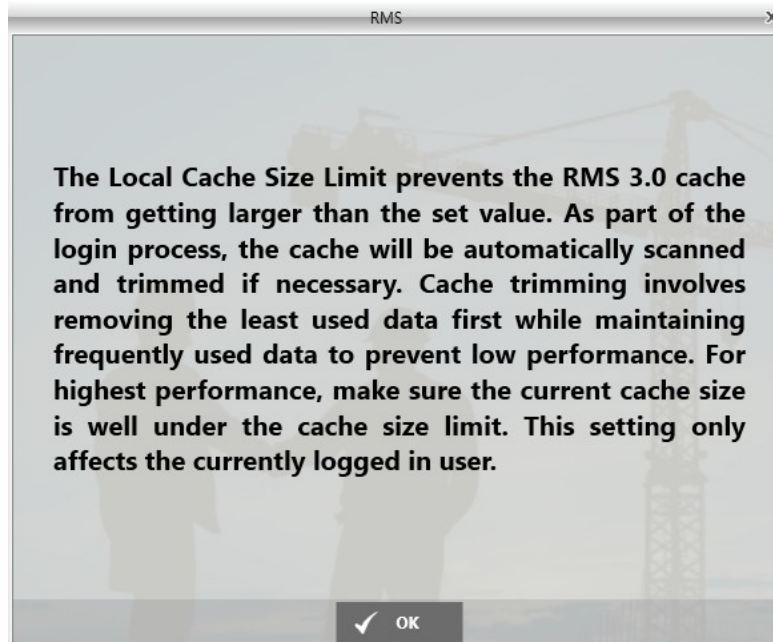
**Unlimited Cache:** Check this box to remove the cache limit. By unchecking this box, users will see a sliding bar to set the amount of cache limit on the computer.



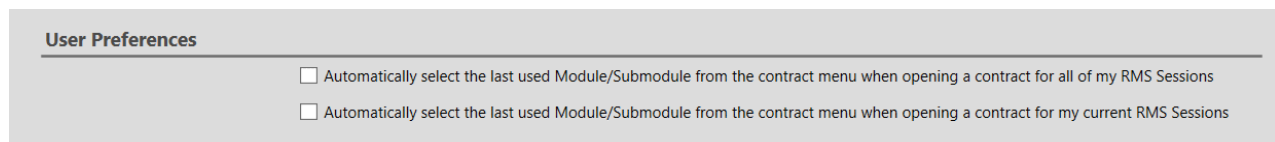
**Restore Default Settings:** Click here to reset the cache to the default setting.



Cache limit explained:



### 3.7.2 User Preferences



The first two checkboxes control the RMS view that is displayed when opening a contract. The default setting has both boxes unchecked. In this case, whenever a contract is opened, the opening view is the main **Contract Menu**.

The first checkbox controls the starting view every time a contract is opened in RMS. Checking this box will always open a contract in the same module that was last accessed. This is useful for users who typically work in the same module all the time.

The second checkbox controls the starting view each time a contract is opened during the current login. Checking this box will enable switching between contracts while remaining in the same module. This is useful for easily comparing data between contracts.

The two selections are not mutually exclusive. One or both may be selected.

### 3.8 RMS Mobile

While this data and the module in RMS is still valid, this feature is no longer supported or available for new users to access.

### 3.9 RMS Staff

To use RMS, a user must be listed here in [RMS Staff](#). Only a System or District Administrator can access this module.

**Note:** The RMS system allows the TMO office and Headquarters office personnel to have access to accounts in all Districts. The District Administrator and Office Administrator will no longer be able to delete or modify the user accounts for the associated District if the account owner is part of the TMO office or Headquarters office.

**T2 Baltimore Test District**  
81 Offices, 1,940 Staff, 1,427 Contracts

Government Mode Home Back Refresh Log Out Help

Local Office District Office District Library System Library Summary Reports RMS GIS User Settings RMS Mobile **RMS Staff**

T2 Baltimore Test District (including suboffices) Favorites Recent

All 1,940  
Active 1,606 Inactive 334

District Administrators - Full 115  
District Administrators - Partial 40  
District Wide Read Access 354

**Office Administrators**

	Full	Partial
WALTER REED Resident Office	4	1
EMDC Engineering	1	0
JBM-HH Resident Office	5	2
NGA RESIDENT OFFICE	4	2

Add Edit Delete **All Staff** Export

Drag a column header and drop it here to group by that column

Sort Name	RMS ID	Office Name	Active	Last Logged In	Deleted Staff
...	NOTAMSZ1	Middle East District	<input checked="" type="checkbox"/>	9/18/2024 1:21x	<input type="checkbox"/>
...	E7IPES7Z		<input type="checkbox"/>	4/30/2024 10:58	<input type="checkbox"/>
...	K3M1D10	T2 Baltimore Test District	<input checked="" type="checkbox"/>	8/29/2024 7:09:	<input type="checkbox"/>

Click on any of the numbered boxes in the top section to see a list of the people who are members of the selected subset. Click on the name of a person in the bottom section to see details on the selected person. Click on [Add](#) to add a new staff member.

RMS Add View

**Add Staff Member**

The following information is required to add a new Staff Member

RMS ID


**OK** Cancel

**RMS ID:** For CAC holders, this is the 8-character CEFMS ID. For non-CAC holders, enter a unique alphanumeric identifier, 9 characters max, then click on [OK](#).

**Note:** Any alphabetic characters entered will be forced into uppercase upon clicking [OK](#) to confirm entry.



**RMS Staff - User ID TESTINGM**



**RMS User CAC Card**

User  
Test

Staff record NOT linked to RMS 3 login account

[Link Staff record](#)

[Enable Non CAC Login](#)

First Name:  Last Name:  Abbreviated Name:

Work email address:

Work Phone:  Extension:

Office:  [Add](#)

Position Title:

Inactive Staff Member

Support Staff Member from another District/Division/HQ

Will this person be a District POC for RMS/QCS Tech Support

Receive Emails regarding RMS and QCS Updates and News

No access to government estimate on change request register

Signature Blocks [Add](#)

Contract roles for this user will be:  District Wide  By Office

**District Admin Rights**

[No District Admin Rights](#)

District Wide Read-Only

Summary Reports

PII Admin

**Office Admin Rights**  Show All Offices

**Contract Rights**  Show All Offices

**First Name:** New user's first name.

**Last Name:** New user's last name.

**Abbreviated Name:** Unique nickname for the user, 8-character limit. This is the name that will be used to label data entries when multiple users' entries are allowed.

**Work email address:** New user's email address. When non-CAC login is enabled, this is the email used to login.

**Note:** This field is required and must be filled out prior to hitting the [Back](#) button

**Work Phone:** New user's primary phone number.

**Extension:** New user's phone extension when applicable.

**Office:** Select the office to which the new user belongs from the *Office Lookup* list. If the office is not listed, go to [Local Office | Office Tree](#) to add it.

**Position Title:** Select the new user's position from the *District Position Lookup* list. If the title is not listed, go to [District Office | Position Titles](#) to add it.

**Inactive Staff Member:** Check this box when a user has left the District and will no longer be accessing the District's RMS.

**Recommendation:** Use this setting instead of deleting staff that have departed. Deleting a user may affect data this user has entered.

**Support Staff Member from another District/Division/HQ:** Check this box to identify a user who is a USACE employee (with CAC) but does not belong to this District.

**Will this person be a District POC for RMS/QCS Tech Support:** Check this box to identify this person as a resource for assisting users in this District.

**Receive Emails regarding RMS and QCS Updates and News:** Check this box to include this person in the mailing list from the RMS Center.

**No access to government estimates on change request register:** Check this box to restrict this user's access to Government Estimates, regardless of other settings that authorize access to the change request module.

**Signature Blocks:** Click on **Add** to add the new user's signature block(s). Users may have multiple signature blocks. Whenever there is a signature prompt, the lookup list will include all the signature blocks name and title combinations of all users that have been entered in this section.

**District Admin Rights:** Use this area to authorize the user to perform actions that affect the entire District. Access can be unlimited or restricted to specific areas.

**Note:** Assign these rights sparingly since whatever this person does here will affect the entire District. When there are multiple District Administrators, be aware that the actions of one District Administrator can conflict with the actions of another. Communication is essential.

**Office Admin Rights:** Use this area to authorize the user to perform actions that affect an office. The user need not be authorized the same actions in all offices. His/her authority may be different in each office.

**Note:** Assign these rights sparingly since whatever this person does here will affect the entire Office. When there are multiple Office Administrators, be aware that the actions of one Office Administrator can conflict with the actions of another. Communication is essential.

**Contract Rights:** Use this area to authorize the user access to contracts. Access can be authorized for all contracts in an office, groups of contracts, or individually.

**Note:** To access RMS, it is not enough to just enter the user into the RMS Staff table. The user must also be recognized by RMS. This can be achieved by associating the user's CAC and/or email address with the record.

**Link Staff record:** Use this method when the user has a CAC and will need access to any of the modules that contain financial data. Enter the user's DoD ID number in the space provided, then click on **OK**. The DoD ID number is the 10-digit number found on the back of the CAC.

**Enable Non-CAC Login:** Select this setting to allow the user to log into RMS without a CAC. Login is accomplished using the email address associated with the user and a password. With this type of login, the user will not be able to access any of the financial areas, such as payments and mods.

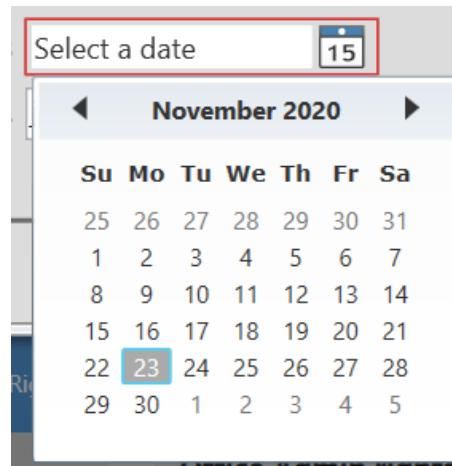
### 3.9.1 PII Admin Rights

The role of a PII Administrator is to make sure that yearly PII Training is properly maintained. Full District Administrators automatically have the capability to act as PII Administrators. The Administrator will validate the documentation requested from the user and enter the expiration date into RMS in the PII Training expiration date box.

**Note:** PII expiration dates will only show for Government users where the **Enable Non-CAC Login** has been enabled.

Pictured above is the view of a user's staff record showing the PII expiration date if the user is set for non-CAC login.

Enter the date by either typing it in or selecting it using the calendar icon to the right of the date box.

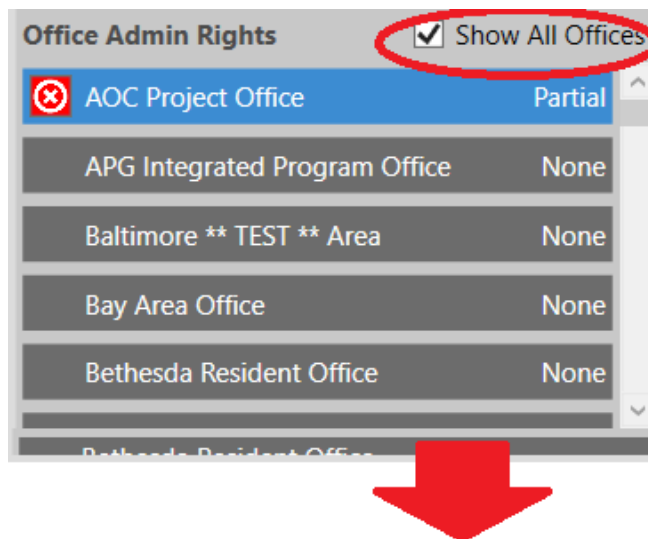


**Note:** A date now shows on the user's staff record. Next, verify that the user's email address is correct, since an email is how the user will be notified when the PII Training needs to be renewed.

When all changes are complete, click the [Back](#) button to save the changes to the user's staff record. Last, the user will need to restart RMS to apply these settings.

### 3.9.2 Office Admin Rights

Office Administrators are automatically authorized full access, with Read and Write capability, to all contract modules in the Office's contracts. To set up Office Admin Rights, check the [Show All Offices](#) box. All the offices in the District will be listed. Click on an office to authorize the user to perform additional selected actions for that office.



**RMS Testing - Office Administrator Rights**

**AOC Project Office**

Full Office Administrator Rights  
 Selected Office Administrator Rights

---

Add/Edit Contracts and Security Classifications - Office  
 Archive Contracts - Office  
 Assign User Roles - Office  
 Office Summary Reports

**Local Office**

Office Description  
 Office Personnel  
 Office Policy  
 Office Documents  
 Office User Defined Macros

P2 Projects  
 Milestone Events  
 Mod Routing Slip  
 Interface Schedule

Check the actions this user will be authorized to perform.

**Full Office Administrator Rights:** In addition to full contract access, this selection authorizes Read and Write access to all [Local Office](#) modules.

**Selected Office Administrator Rights:** In addition to full contract access, this selection limits authorization to the selected actions and read and write capability to the selected areas only. Check the boxes for the areas to which the user will be authorized.

### 3.9.3 District Admin Rights

District Administrators are automatically assigned the same authority as a full Office Administrator. To set up additional District Admin Rights, click on the blue box to authorize the user to perform selected actions and read/write capabilities at the District level.

**District Wide Read-Only:** Check this box to allow the user READ ONLY access to view all data in all contracts and libraries in the District. This setting also gives the user access to run Summary Reports.

**Summary Reports:** Check this box to allow the user to run District-wide Summary Reports only without access to contract or library data.

**District Admin Rights**

No District Admin Rights

District Wide Read-Only  
 Summary Reports

Click here to assign admin rights.

**Full District Administrator Rights:** In addition to full Office Administrator capabilities, this allows read and write access to all [District Office](#) and [District Library](#) modules as well as permission to delete completed/accepted documents and Document Packages.

**Selected District Administrator Rights:** In addition to full Office Administrator capabilities, this selection allows Read and Write capability to the selected areas only. Check the boxes for the areas to which the user will be authorized.

**RMS Testing - District Administrator Rights**

**T2 Baltimore Test District**

Full District Administrator Rights  
 Selected District Administrator Rights

---

Add Offices

Delete Offices

Add/Edit Contracts and Security Classifications - District

Archive Contracts - District


Assign User Roles - District

**District Office**

Office Description  
 Office Personnel  
 District Position Titles  
 Contract User Roles  
 District Review Office

**District Library**

Contract Groups  
 Custom Reports  
 Word Templates  
 User Defined Macros  
 Letter Agency Codes  
 Standard Text  
 QA/QC Reports  
 Features of Work  
 Dredging Waterways



Check the actions this user will be authorized to perform.

District Policy  
 Prime Contractors  
 FY Baseline Placement  
 Contractor Claims

Specification Sections  
 Submittal Types  
 District Milestones  
 Claim Events  
 Contractor Trades  
 Labor Classifications  
 Work Categories  
 Construction S Curves

### 3.9.4 Contract Rights

Contract roles for this user can be either district wide or by office:

Select *District Wide* to assign the user a single User Role across all offices in the District.

Select *By Office* to assign the user different User Roles in each office. His/her access may be different in each office, but there can only be one role per office.

If setting permissions by office, first check the *Show All Offices* box. All the offices in the District will then be listed.

### 3.9.5 Role By Office

Select the office in which Contract Rights will be assigned to the user. Double click on the office to choose between access to all contracts or only a select number of contracts.

Contract roles for this user will be:  District Wide  By Office

Contract Rights  Show All Offices

AOC Project Office	All Contracts
APG Integrated Program Office	All Contracts
Baltimore ** TEST ** Area	All Contracts
Baltimore District	All Contracts



### 3.9.6 Access to All Contracts

Use this selection when the user needs authorization for identical access to all an office's contracts. Click on [User Role](#) to select a role from the *Role Definition Lookup* list. Select a role, then click on [OK](#). Select [All contracts at the selected office](#) to authorize the access associated with this role to all contracts in the office.

Click on the [Back](#) button once to continue to authorize access in additional offices. Click on the [Back](#) button again to return to the Staff List.

### 3.9.7 Access to Selected Contracts

AOC Project Office - Contract User Role

User Role:

Apply this Role to:  All Contracts at AOC Project Office  Selected Contracts at AOC Project Office

Apply selected role for [ ] to A

Resident Management System

Role Definition Lookup

Role Definitions

Drag a column header and drop it here to group by that column

Role Title
> CON REP - SUBMITTALS
CON REP - RESTRICTED
CON REP - FULL
CON REP - BELVOIR
ADMINISTRATIVE
AREA ENGR / ACO
PROJ ENGR - RESTRICTED
PROJ ENGR - FULL
OFC ENGINEER - RESTRICTED
OFC ENGINEER - FULL
CONST MGR - RESTRICTED
CONST MGR - MID
CONST MGR - FULL

OK Cancel Clear Selection

Use this selection when the user only needs authorization to access a subset of identified contracts. This access, however, must be the same for all identified contracts. Users can have only one role in an office.

Click on *User Role* to select a role from the *Role Definition Lookup* list. Select a role, then click on *OK*.

Select *Selected Contracts at the selected office*. A list of all the contracts assigned to the office will be displayed. Select the contract(s) to which the selected User Role will be applied.

Click on the *Back* button once to continue to authorize access in additional offices. Click on the *Back* button again to return to the Staff list.

**Baltimore \*\* TEST \*\* Area - Contract User Role**

User Role: **CON REP - FULL**

Apply this Role to:  All Contracts at Baltimore \*\* TEST \*\* Area  
 Selected Contracts at Baltimore \*\* TEST \*\* Area

**Select Contracts for User/Role** Search X Export

Drag a column header and drop it here to group by that column

Contract ID	Contract/Delivery Order No.	Full Title of Contract
<input type="checkbox"/> E1000171	DACA31-00-D-0035 0001	Boiler Contracts CIM Support
<input checked="" type="checkbox"/> E1000214	DACA31-01-C-0024 01	*** TEST ***
<input checked="" type="checkbox"/> E1000222	DACA31-02-C-0010 01	RWS Test Project
<input type="checkbox"/> E1000399	DACA31-02-C-0016	Academic Research Facility Test Project
<input type="checkbox"/> E1000963	DACA31-06-C-0011	Dale Test - Project Roadway Improvements
<input type="checkbox"/> E1000400	DACA31-94-C-0176	Package #2, Sitework, Plant Addition
<input checked="" type="checkbox"/> E1000065	DACA31-95-D-0083	UNDERGROUND TANK UPGRADE
<input type="checkbox"/> E1000072	DACA31-95-D-0083 0031	REMED OF LANDFILL
<input type="checkbox"/> E1000073	DACA31-96-D-0026 0026	DECONTAMINATE BLDG SURFACE
<input type="checkbox"/> E1000403	DACA31-98-T-0020	Defense Distribution Center (Test)

### 3.9.8 District-Wide Role

Use this selection when the user needs uniform access to all the District's contracts. Making this selection after the user has already been authorized access by office, will negate the By Office authorizations.

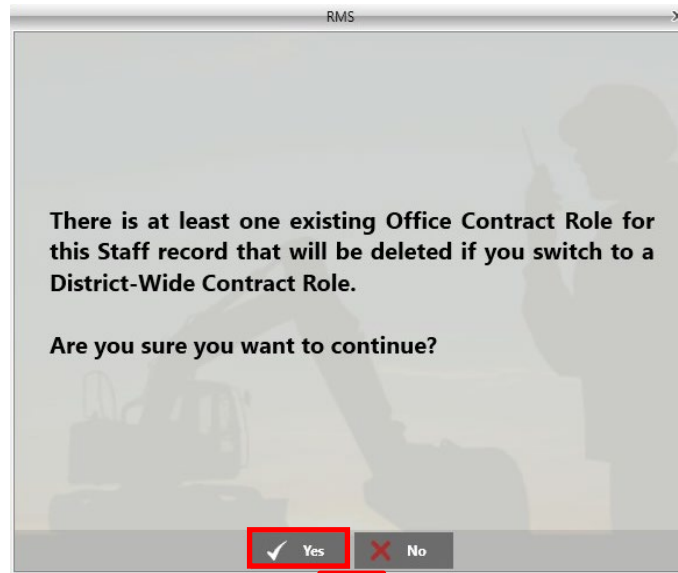
Contract roles for this user will be:  District Wide  By Office

Contract Rights  Show All Offices

<input checked="" type="checkbox"/>	AOC Project Office CON REP - FULL	All Contracts
<input checked="" type="checkbox"/>	Baltimore ** TEST ** Area CON REP - FULL	Selected Contracts

Click on this box to remove an individual Contract Right.

Selecting District Wide will remove all the ByOffice contract rights previously set.



Previously set Contract Rights are removed and replaced with a District-Wide role.

- Contract User Role

**Baltimore District - District Wide Contract Role**

NOTE: This District-Wide Contract Role will apply to [ ] for every contract in the District. Select an appropriate role as needed using the lookup table.

User Role: <Not Set>

Resident Management System

**Role Definition Lookup**

Role Definitions

Drag a column header and drop it here to group by that column

Role Title
CON REP - SUBMITTALS
CON REP - RESTRICTED
> CON REP - FULL
CON REP - BELVOIR
ADMINISTRATIVE
AREA ENGR / ACO
PROJ ENGR - RESTRICTED
PROJ ENGR - FULL
OFC ENGINEER - RESTRICTED
OFC ENGINEER - FULL
CONST MGR - RESTRICTED
CONST MGR - MID
CONST MGR - FULL

OK Cancel Clear Selection

Contract roles for this user will be:  District Wide  By Office

**Contract Rights**

<input checked="" type="checkbox"/> Baltimore District - District Wide CON REP - FULL	All Contracts
--	---------------

Click on the [Back](#) button twice to return to the Staff list.

## 4.0 CONTRACT MODE

Most users will primarily use Contract Mode. Use the filters to customize the table and facilitate opening frequently accessed contracts. Enter Contract Mode by selecting a contract from any of the filtered lists in the top half of the screen or the list of contracts shown in the bottom half of the screen.

What is on the Screen?

The screenshot shows the RMS Contract Mode interface for the T2 Baltimore Test District. The interface is divided into several sections:

- Top Navigation:** Includes a home icon, a back arrow, and buttons for Log Out and Help.
- Filtering and Summary:** A section on the left shows a hierarchical list of all Offices in the District. A 'Favorites' section lists up to four contracts marked as favorites. A 'Recent' section lists the four contracts most recently opened.
- Main Contract List:** A table displaying a list of contracts with columns for Contract ID, Full Title of Contract, Office Name, and Contract Stage. A callout explains that the numbers in the Contract Stage column represent the number of contracts in each stage, and clicking on a stage will filter the list to those in that state.
- Bottom Controls:** Includes a 'Filter using Contract Group' dropdown and radio buttons for 'Display Contracts' (selected) and 'Display Projects'.

Callouts provide additional instructions:

- Click here to view a hierarchical list of all Offices in the District. Click on an Office in the list to see just the Contracts in the selected Office.
- For quick access, up to four Contracts marked as a favorite are listed here.
- For quick access, the four Contracts most recently opened are listed here.
- Click here to remove a Contract from the Favorites list.
- These numbers represent the number of Contracts in each stage. Click on a Contract Stage to limit the Contracts listed below to those in the selected state.
- Click here to limit the Contracts listed to the results from one of the Contract Groups queries defined in the District Library.
- Select Display Projects to include a column showing the P2 Project ID associated with the Contract.

Contract/Delivery Order No.	Contract ID	Full Title of Contract	Office Name	Contract Stage
DACW31-01-C-0016	E1000044	Hudson Branch, Sec 14	Bay Area Office	Physical Complete
DACA31-95		NANSEMONT ORDANANCE DEPOT	Baltimore ** TEST ** Area	Active
DACW31-9		PHASE II NPL LANDFILL	Baltimore ** TEST ** Area	Active
DACA31-95		UNDERGROUND TANK UPGRADE	Baltimore ** TEST ** Area	Future
DACA31-95		REMED OF LANDFILL	Baltimore ** TEST ** Area	Future
DACA31-96		DECONTAMINATE BLDG SURFACE	Baltimore ** TEST ** Area	Future
DACA31-01		Vehicle Control (Points) Access	Fort Meade Resident Office	Fiscal Complete
DACW31-0		Anacostia River, Phase I, Pkg II	Fort Meade Resident Office	Final Payment Made
DACA31-01-C-0040	E1000146	Chilled Water Line Extension	Walter Reed Resident Office	Final Payment Made
NAFFQ3-01-C-0001	E1000182	Design/Build Family Travel Camp	Fort Meade Resident Office	Final Payment Made
DACA31-01-C-0039	E1000183	Design/Build Fire Station	Walter Reed Resident Office	Final Payment Made

**Contract/Delivery Order No.** The alphanumeric identifier assigned by the Contracting Officer in the Award Letter. This number identifies the District in which the contract was awarded and the Fiscal Year in which it was awarded.

**Contract ID:** A unique 8-digit alphanumeric identifier assigned by RMS. The first 2 characters identify the District in which the contract is being managed in RMS.

**Full Title of Contract:** Contract Title entered in [Administration](#) | [Contract Description](#).

**Office Name:** Contract Office selected in [Administration | Contract Description](#).

**Contract Stage:** There are 6 stages identifying where the contract is relative to the project timeline. Stages are automatically determined by RMS based on System Milestone actual dates.

- **Future:** A project is created but not yet awarded. A project will show as Future so long as the Contract Award RMS System Milestone does not have an actual date.
- **Active:** A project will show as Active after the Contract Award RMS System Milestone has an actual date. Contract is awarded with an Actual Award Date.
- **Construction Complete:** A project will show as Construction Complete after the Construction Completion RMS System Milestone has an actual date. Construction is completed, and the Government has established an actual Construction Complete Date (CCD), also referred to as Substantial Completion Date (SCD). There may still be minor work remaining, but for the most part, the facility is usable for its intended purpose. This is the date that will stop the assessment of liquidated damages (LDs).
- **Physical Complete:** A project will show as Physical Complete after the Contract Physical Completion RMS System Milestone has an actual date. All contract work is completed, including as-builts, O&M manuals, minor deficiency repairs, etc. The Contractor has no remaining work left on the contract except warranty.
- **Final Payment Made:** A project will show as Final Payment Made after the Contractor Final Payment RMS System Milestone has an actual date. The Government has paid out all contract funds to the Contractor.
  - Note:** This actual date is set automatically by the Progress Payment that is marked as the final payment.
- **Fiscal Complete:** A project will show as Fiscal Complete after the Project Fiscal Completion RMS System Milestone has an actual date. The Government has closed the books on the project. All funds have been paid and/or returned, as applicable.

A contract's stage can be found in both the [Milestone Schedule](#) module in the upper left corner as well as in the Contract Selection view listing for the contract. Refer to section 9.2 Milestone Schedule in Volume 3 of this Government Manual for more information on the System Milestones.

## 4.1 Add New Contract

Click on [Add](#) to add a new contract. This action is only accessible to users with Office Administrator rights to [Add/Edit Contracts—Office](#).

**Note:** The [Add](#) button will only appear if the [Display Contracts](#) radio button is selected.

**Title for New Contract:** Enter an abbreviated title for the contract. Use no more than 40 characters. Match the official Contract Title as closely as possible.

**Office:** This is the office that will be administering the office on a day-to-day basis and taking credit for contract placement. If needed, the previously selected office may be changed here. Click on this box and select an alternate office from the *Office Lookup* list, then click on [OK](#).

**Copy data from another Contract:** When the new contract has similar data to an existing contract, to save time, the similar data can be copied. Copying will not preclude later editing of the copied data to tailor the specifics to the new contract.

Select the contract from which to copy, then place a check on all the areas to copy. When done, click on [Copy Selected Data](#).

**Note:** Read the WARNING message before clicking on [Copy Selected Data](#). This action will overwrite all data in the copied areas.

### Copy Data From Another Contract

**Select Contract to Copy From**

Copy from Contract: E1002588 W9128F-16-D-0050 W9128F18F0328 Financial Test Contract

Click here to select a contract from the *Contract Lookup* list.

**Select Data to Copy**

Check AllUnCheck All

- Contract Description
- Project Delivery Team
- Contract Setup - Administration/Funding
- Contract Setup - Payment/Modifications
- Contract Setup - Quality Assurance
- Contract Setup - Submittals/Schedule
- Contract Setup - Dredging
- Prime Contractor
- Subcontractors
- Features of Work/3 Phase Inspections
- QC Tests
- User Schools
- Installed Properties
- Transfer Properties
- QA Tests
- Submittal Register/Spec Sections
- Real Property

Check the boxes of data to copy to the new contract

WARNING: This process will overwrite data and CANNOT BE UNDONE. Selected areas will be completely overwritten with data from the source contract. For example, if you select submittal register, then all existing submittal registers and submittal items will be deleted from this contract and the submittal register and submittal items from the source contract will be added

Copy Selected Data



**WARNING: This process will overwrite data and CANNOT BE UNDONE. Selected areas will be completely overwritten with data from the source contract. For example, if you select submittal register, then all existing submittal registers and submittal items will be deleted from this contract and the submittal register and submittal items from the source contract will be added**

Are you sure you want to continue and overwrite existing data?

Click on **YES** to continue or **NO** to cancel.

✓ Yes✗ No



Copy of Data is now Complete

OK

## 4.2 Contract Menu

In Contract Mode, the **Contract Menu** screen is the main screen from which to access the various modules in RMS. Return to this screen from any screen within RMS to move between these modules. If this contract is accessed frequently, then users can click on **Mark as Favorite** (located under the **Help** button in the top right of the view). This will add the current contract to the Favorite's List in the main view of the District.

RFI's		Changes		Submittals		Deficiencies	
Open:	0	Average Days to Close:	1	Open:	12	Average Days to Close:	118
Closed:	6			Overdue:	2	Average Days to Close:	130
				Open:	0	Completed:	23/32 (71.88%)
						Resubmittal Rate:	9/32 (28.12%)
						QA	QC
						Open:	6 6
						Closed:	0 0

The **Contract Menu** tabs are:

**Administration:** Included in this module are the basic administrative data for the contract, information about the contract, Prime Contractor and Subcontractors, Requests for Information, Correspondence, and RMS Data Management Tools.

**Finances:** Use this module to view financial information shared from CEFMS, enter Award CLINs and Pay Activities, and process requests for Progress Payments and Contract Changes and Modifications.

**QA/QC:** The actions in this module are used to manage what goes on at the jobsite daily. Enter QA Daily Reports; track the Three-Phase Control process, QC Requirements and QA Tests; and maintain safety awareness.

**Submittals:** The features included in this module are used to manage the Submittal Register and Transmittals.

**Schedules:** This module is used to view the status of activities in the Activity schedule, view/schedule Three Phase Control meetings for features, track milestone dates, and enter and track placement.

**Closeout:** Use this module to prepare closeout documents, including the DD1354 and the DD1149; draft Contractor Performance Evaluations, and track 4 and 9-month Warranties.

**Import/Export:** This module includes the operations needed to bring external data into RMS and export selected Document Packages.

**Contract Reports:** All the available printed reports can be executed from this module.

### 4.3 Contract Status Metrics Summary

This dashboard will be displayed on the [Contract Menu](#) for all contracts, and it reflects Contract Status Metrics. The data shown here is pulled directly from each respective module in the contract.

RFI's		Changes		Submittals		Deficiencies	
Open:	0	Average Days to Close:	1	Open:	12	Average Days to Close:	118
Closed:	6			Overdue:	2	Average Days to Close:	130
				Open:	0	Completed:	23/32 (71.88%)
						Resubmittal Rate:	9/32 (28.12%)
						Open:	6
						Closed:	0

The **RFIs** box will display the counts of **Open** and **Closed** RFIs. The **Average Days to Close** value will reflect the average number of days it takes to complete/close RFIs. The days to close is based on the contractor requested date and the government answered date. See the [Request for Information](#) module for more information on the values listed here.

The **Changes** box will display the counts of **Open** and **Closed** Change Requests. The **Average Days to Close** value will reflect the average number of days it takes to complete/close Change Requests. A change is considered open if the status is 4 or 5, and that change has not been canceled. A change is considered closed when the status of the change is 6. See the [Contract Changes](#) module for more information on the values listed here. That module is reviewed in volume 2 of this manual.

The **Submittals** box counts for **Overdue** and **Open** submittal items. See the [Submittal Register](#) and [Transmittal Log](#) modules for more information on the values listed here. Those modules are reviewed in volume 3 of this manual.

- The **Average Days to Close** value in this box will reflect the number of days it usually takes to complete/close a submittal item.
- The **Completed** figures will show the progress of how many submittal items have a status of Completed in the submittal register for the contract.
- The **Resubmittal Rate** figures will reflect how many submittals have been resubmitted and at what rate resubmittals are occurring in the contract.

The **Deficiencies** box will display counts of **Open** and **Closed** QA/QC deficiencies. Deficiencies are considered closed if they have been marked corrected by the contractor and verified by the government. See the [QA/QC Summary](#) module to view the deficiencies at a glance. Also, see the [QA](#) and [QC Daily Reports](#) modules to mark those deficiencies as either verified or corrected. Those modules are reviewed in volume 3 of this manual.

Action items are those actions that the Government has identified critical to contract performance.



The action level: High, Medium, Low, is also identified by the Government. The numbers in the boxes show the number of items that have not been completed. Click on a box to view the detailed list.

**Government Action Items** are the total of all items requiring completion by the Government.

**Contractor Action Items** are the total of all items requiring completion by the Prime Contractor and its subcontractors.

**My Action Items** are the number of items requiring completion by the logged in user.

The box color indicates the existence of items within the 3 levels.

- **RED** = One or more High Action Items
- **ORANGE** = One or more Medium Action Items, no High Action Items
- **GREEN** = No High or Medium Action Items

The blue tiles identify the number of actions in a category and priority. Click on a tile to view a filtered list of items of the type selected.

Government Action Items				Contractor Action Items				My Action Items			
All	Low	Medium	High	All	Low	Medium	High	All	Low	Medium	High
675	1	674	0	3,500	0	1	3,499	0	0	0	0

Government Action Items - All				
Item Type	Item Title	Action	Alert Level	Responsible Party Name
Milestone Event	Milestone Reschedule Needed	Reschedule date for Milestone: Contract Required Completion	Low	
Pay Activity	Activity Final Follow Up Needed	Assign Final Follow Up to: ACCESS TO BUILDING (SURVEY)	Medium	
Pay Activity	Activity Final Follow Up Needed	Assign Final Follow Up to: ACCESS TO BUILDING (CONSTR)	Medium	

## 5.0 ADMINISTRATION

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> Enter award description and funding sources. Contract location should be entered.	<b>Contract Status</b> Enter status/delay codes. Update Issues and Photo.	<b>Contract Personnel</b> Assign PDT and view User Roles.	<b>Contract Documents</b> Legacy Documents prior to Document Packages. Use Contract File for current documents.				
<b>Contract File</b> Documents stored in Document Packages.	<b>Contract Setup</b> Determine how contract is to be managed by QA and QC staff. Setup submittal register.	<b>P2 Projects</b> Link RMS Contract to P2 Project.	<b>Correspondence</b> Create, edit, and view, Letters and Memos.				
<b>Request for Information</b> Respond to RFI's from Contractor.	<b>Contract User Entries/Special Data</b> Insert data for District generated macros for reporting.	<b>Prime Contractor</b> Identify Contractor for payment purposes and view Contractor Staffing.	<b>Subcontractors</b> Identify Subcontractors, POC's, and Trades.				
<b>Contractors Onsite</b> Enter dates that Subcontractors will be on-site.	<b>Contractor Insurance</b> Track General, Auto, and Workman's Comp Insurances.	<b>Contractor Payrolls</b> Enter or Review Contractor Payrolls for Department of Labor reporting purposes.	<b>Labor Interviews</b> Conduct Labor Standard Interviews for Davis-Bacon Compliance.				
<b>Action Item Control</b> Control selection, severity and responsible parties for contract action items.	<b>Contract Notification Control</b> Control which notifications you will receive for this contract.	<b>Contractor Mode Record Locks</b> Lock selected records to prevent changes in Contractor Mode.	<b>Mobile Files</b> Organize files uploaded from linked mobile devices.				

The normal administrative functions of a typical contract are managed in this module. It is where the descriptive data and status of the contract are entered and information on the Contractor is administered. Correspondence and Requests for Information (RFIs) are created and tracked, notifications can be set, and files from a mobile device can be accessed.

**Note:** Non-CAC users who need access to the Labor Interviews or Contractor Payrolls will get notifications for PII Training expiration dates when the expiration date is 30 days, 15 days, 7 days, 6 days, 5 days, 4 days, 3 days, 2 days, 1 day prior to the expiration date and again once the date has passed. For the user to continue to have access to the Labor Interviews or Contractor Payrolls, the user will need to retake the PII Training and provide it to the District Admin before the expiration date. If the user does not do this, access to those modules will be revoked.

## 5.1 Overview

The information accessed from the **Administration** tab is:

**Contract Description:** Select this module to enter information identifying the contract, its location, its Primary Fund Type, and Customer. Basic information on the source of the design can also be entered here.

**Contract Status:** Select this module to enter status information to be included on the Contract Status Report.

**Contract Personnel:** Select this module to identify members of the PDT and view the staff members with access to the contract and along with each member's assigned roles.

**Contract Documents:** Documents that were created and stored in RMS 2.38.

**Contract File:** Manage documents for the contract here.

**Contract Setup:** Use this module to set parameters around which the contract will appear and operate in RMS. The settings in this area can vary from contract to contract to customize how data is entered and treated.

**P2 Projects:** Use this module to link the contract to its P2 Project counterpart. Construction contract information that is stored in P2 can also be viewed here.

**Correspondence:** Use this module to manage correspondence between Contractor and Government. Correspondence can be drafted, sent, and received using RMS.

**Request for Information:** Use this module to manage the flow of Requests for Information (RFI) between Contractor and Government. Contractor RFIs and the respective Government responses are created, submitted, and tracked using RMS.

**Contract User Entries/Special Data:** Enter the data stored in the District Library's User-Defined Macros here.

**Prime Contractor:** Use this module to identify the Prime Contractor and its administrative data, such as addresses, phone numbers, and staff.

**Subcontractors:** Use this module to identify and store administrative data on all the contract's Subcontractors.

**Contractors on Site:** This module that allows the Government to view all the Subcontractors with First and Last Day dates as well as the associated Responsibility Code and Trade

**Contractor Insurance:** Use this module to keep track of Prime and Subcontractors contract required SF1413 and insurance expiration dates for General, Auto, and Workman's Comp.

**Contractor Payrolls:** Tracking and documenting of Contractor Payrolls is required on typical Military and Civil Construction projects in the United States that fall under the auspices of the Davis-Bacon Act. In some limited cases, this is also required on contracts performed in overseas (OCONUS) locations. Use this selection to track and document payroll information to satisfy this requirement.

**Labor Interviews:** Use this module to document responses to labor interviews and compliance with submitted payroll data.

**Action Item Control:** Identify the actions for which alerts should be generated when not completed.

**Contract Notification Control:** RMS can send notifications when selected contract-related events occur. Use this selection to identify who should receive the notification and the method by which it is delivered.

**Contractor Mode Record Locks:** Use this module to prevent the Contractor from editing specified data records.

**Mobile Files:** Use this module to see a list of all the files that were uploaded from a mobile devices.

## 5.2 Contract Description

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>		<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>		<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>		<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>	
<b>Contract File</b> <i>Documents stored in Document Packages.</i>		<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>		<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>		<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>	
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>		<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>		<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>		<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>	
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>		<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>		<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>		<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>	
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>		<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>		<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>		<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>	

The **Contract Description** module contains basic contract information that is used throughout RMS. Most reports incorporate some form of the Contract Title, while other descriptors are used to filter and sort. To ensure meaningful and consistent output, it is very important to correctly complete the required data fields.

**UNDERGROUND TANK UPGRADE**  
[E1000065] DACA31-95-D-0083

Government Mode Home  
Contract Selection  
Contract Menu

Back Refresh Log Out Help

### Contract Description

Contract Title: UNDERGROUND TANK UPGRADE  
Contract Short Title: UDGRD TANK  
Contract No.: DACA31-95-D-0083  
Contract Office: CENAB-TEST - Baltimore \*\* TEST \*\* Area  
Contract Long Title: UNDERGROUND TANK UPGRADE

Fiscal Year:   
Customer Project No.: 4256-0002  
Delivery Order No.: NA

Select Contract Office

Exclude from District placement Calculations?

Will ARRA funding be used for this contract

Contract Description:

Primary Fund Type: <Not Set> Contracting Method: <Not Set>  
Contract Location: DIX Customer: <Not Set>

Select location on map Latitude:  Longitude:   
Existing contract locations We have been notified that geo spatial information needs to come from official sources.

Wage Determination No:  Wage Determination Date: Select a date [15] Bid Open Date: Select a date [15]

BIM Compliant

Design Build Code: Architect-Engineer  
Design Cost: \$0.00  
Designer Name:   
Address:

Contract requires a small business plan  
 Contract Administered by SBA

Includes COVID-19 DFARS Deviation for Safer Federal Workforce (Vaccine Mandate)

**This section is required.**

**This section is not required. Enter data as needed by Contract or District Policy.**

**Contract Title:** The Contract Title is limited to forty (40) characters in length. As such, it may be an abbreviated version of the Contract Title as awarded.

**Recommendation:** Match the Awarded Title as closely as possible to enable easier recognition of the contract.

**Fiscal Year:** The Fiscal Year (FY) indicates the FY the contract was authorized. In RMS, it is used for such things as tracking potential retiring funds.

**Customer Project No.:** This number will come from the Customer and should be known as part of the project turnover from project management.

**Contract Short Title:** The Short Title is the abbreviated title of the contract, limited to twenty (20) characters. It is used in many reports and calendars where space is limited.

**Contract No.:** The Contract Number is the unique contract identifier assigned by the Contracting Officer to the contract. It should be used on all official documents related to the contract. Parts of

the number identify the District administering the contract, the fiscal year in which the contract was awarded and the Contract Type.

**WARNING:** It is critical that the number entered here matches exactly what is in CEFMS or the CEFMS data will not download to RMS when the [CEFMS download](#) or [CEFMS Cleanup](#) are run. Make sure that if the Contract Number (obligation number in CEFMS) has dashes in CEFMS, those dashes are also shown in RMS. Do not insert any blank spaces into this area as this could make the number look correct but due to the extra characters, it still will not sync correctly with CEFMS.

**Delivery Order No.:** When the Contract Type is a Multiple-Award Task-Order type, the Delivery Order number is used to identify the specific order placed against it. Otherwise, the data field contains "NA".

**WARNING:** It is critical that the number entered here matches exactly what is in CEFMS or the CEFMS data will not download to RMS when the [CEFMS download](#) or [CEFMS Cleanup](#) are run. Make sure that if the Contract Number (obligation number in CEFMS) has dashes in CEFMS, those dashes are also shown in RMS. Do not insert any blank spaces into this area as this could make the number look correct but due to the extra characters, it still will not sync correctly with CEFMS.

**Contract Office:** The Contract Office identifies the office that is administering the contract as the Contract Administration Office (CAO). This is usually the office associated with the Administrative Contracting Officer (ACO) and/or the Contracting Officer Representative (COR).

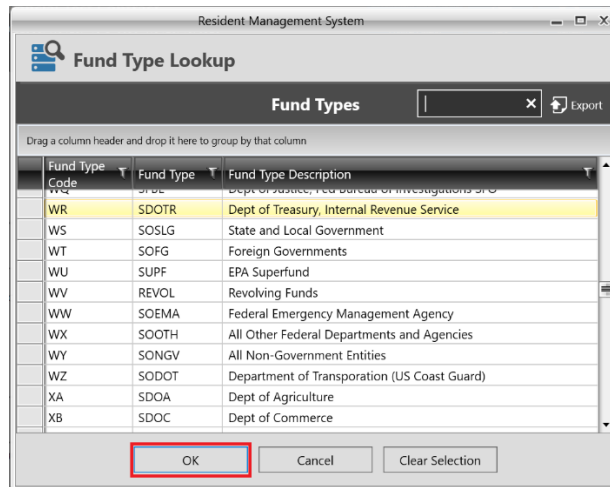
**Contract Long Title:** This is the complete title of the contract as it appears on Contract Award documents. There is no character limit.

**Exclude from District placement Calculations?** Check this box when the contract's placement numbers should not be included in the office's placement calculations. Use this setting on test contracts or contracts which are managed by another District.

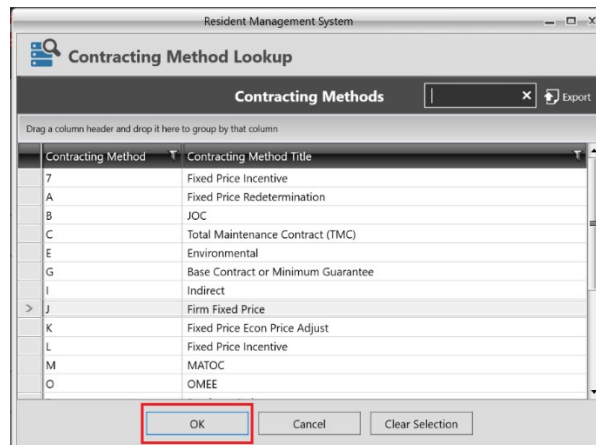
**Will ARRA Funding be Used for this Contract?** Check this box when the contract is funded using ARRA funds.

**Contract Description:** The Contract Description is a brief description of the contract scope. This information will output on the Contract Status Report.

**Primary Fund Type:** Click on the box and select from the *Fund Type Lookup* list. When the contract is funded by more than one type of funding, select the type providing the largest share of the funding or the type under which placement will be credited in the Placement reports.

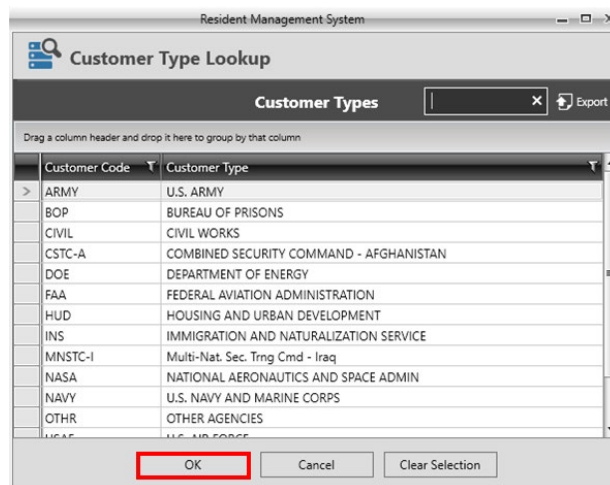


**Contracting Method:** Click on the box and select from the *Contracting Method Lookup* list.



**Contract Location:** Enter the location of the contract as described in the title of the contract as awarded. Entering a location will include the contract in [District Library | Contract Locations](#).

**Customer:** Click on the box and select from the *Customer Type Lookup* list.



**Latitude, Longitude:** Displays the coordinates of the location. This can be done by selecting it on the map view (red dot), choosing it from existing contract locations, or by manually entering the data.

The screenshot shows a form with the following elements:

- A button labeled "Select location on map" with a callout: "Click here to open a map view. Place the red dot on the location."
- A button labeled "Existing contract locations" with a callout: "Click here to open District Library | Contract Locations"
- Input fields for "Latitude" (34.919268577698) and "Longitude" (-117.823150634766).
- A note: "We have been notified that geo spatial information needs to come from official sources."

The following fields are not required entries and are not used anywhere else in RMS. However, this data is retrievable for inclusion in Custom Reports.

**Wage Determination No:** The number of the Wage Determination in effect for the contract. A wage determination is the listing of wage rates and fringe benefit rates for each classification of laborers and mechanics which the Administrator of the Wage and Hour Division of the U.S. Department of Labor has determined to be prevailing in a given area for a particular type of construction. This is usually included with the contract specifications.

**Wage Determination Date:** The date of the Wage Determination in effect for the contract.

**Bid Open Date:** The date on which the Bid/Proposal was received/opened.

**BIM Compliant:** Check this box when the design of the contract complies with the requirements for BIM Level 2 Compliance.

**Design Build Code:** Select the Design Procurement Method from the drop down.

- Adapt Build
- Architect-Engineer
- Design-Build, RFP developed by A-E
- Design-Build, RFP developed by Hired Labor
- Design-Construct or Turnkey
- Hired Labor
- Indirect Design
- Technical Services
- Troop Labor
- Using Service or Agency

If known and available, enter information relating to the Design/Designer: **Design Cost**, **Designer Name and Address**.

**Contract requires a small business plan:** Check this box if the Contractor is a large business and the award conditions required a small business plan. Check with the Contracting Officer. It may be required to monitor compliance with the plan and report back. The Contractor's compliance with the plan in the CPAR will also need to be addressed. If this is checked, a text field for **Small business plan goal %** will appear.

The screenshot shows a checkbox labeled "Contract requires a small business plan" which is checked. To its right is a text input field labeled "Small business plan goal" with the value "0" and a percentage sign "%".

**Contract Administered by SBA:** Check this box if the Contractor is a small business and the contract is being administered by the Small Business Administration (SBA). When this is the case,

the SBA will be identified as the awardee on the Contract Documents. If this box is checked, text fields to enter the Office Name, Office Address, Administrator Name, Administrator Title for the SBA will appear.

*Includes COVID-19 DFARS Deviation for Safer Federal Workforce (Vaccine Mandate):* Check this box if the contract does not include a clause requiring compliance with guidance issued by the Safer Federal Workforce Task Force guidance.

## 5.3 Contract Status

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>			<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>	<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>		
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>			<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>	<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>		
<b>Request for Information</b> <i>Respond to RFIs from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>			<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>	<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>		
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>			<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>	<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>		
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>			<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>	<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>		

Information maintained in this module is useful on several levels. There are means to preserve a photographic record of the contract's progress, compare actual to scheduled progress, and upward report status and issues. The report generated here could also potentially be used to satisfy the monthly COR reporting requirement—confirm with the Contracting Officer.

### 5.3.1 Contract—Status Photos

There are 3 types of data that can be entered in this module. When this module is first selected, it is opened to the **Contract—Status Photos** tab. The photo that is included on the Contract Status Report is selected from the photos uploaded here. The last photo loaded will automatically be checked in the *Is Current Status Photo* column.

To add a photo to the Status Photo collection, click on **Upload New Status Photo** and navigate to the photo file (jpeg or jpg formats only) from the file selection screen that opens. Select the desired photo double-click on it or click on Open. This action automatically saves the photo to the RMS database. When a photo is added, it will become the Current Status Photo and replaces the previous Current Status Photo.

**Note:** Photos to be uploaded must be oriented in landscape mode to display properly in RMS as portrait orientated pictures will display sideways.

Click on **Save**.

**Contract Status**


Contract - Status Photos | Contract - Monthly Progress | Phase - Status / Issues | Field Staff Working Notes

### Status Photo

Select a representative photo to show the current status of the construction contract.

This photo will be used on the main contract menu and in status reports for the contract.

[Upload New Status Photo](#)  
[Save Status Photo to File](#)  
[View Status Photo](#)  
[Image Editor](#)



**Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.**

[Edit](#) [Delete](#) **Status Photo History**  [Export](#)

File Name	Upload Timestamp	Is Current Status Photo
AV Snow.jpg	1/18/2018 9:35:50 AM	<input type="checkbox"/>

**Note:** The title length displayed is limited to 256 characters.

To save a status photo locally, click on the [Save Status Photo to File](#) button, and select a location in which to save the file.


Click on the [Image Editor](#) button to open the Image Editor screen. This screen allows numerous types of edits to be made by using the functions on the left side menu of the view. Once all edits have been made, click on the [Save](#) button to save a new image. This process will create a new image, as the original image will remain unchanged.

Image Editor

**Image Editor**

Image Preview

- Transform
  - Resize
  - Canvas Resize
  - Rotate 90
  - Rotate 180
  - Rotate 270
  - Round Corners
  - Flip Horizontal
  - Flip Vertical
  - Crop
  - Draw Text
  - Draw
  - Shape
  - Selection
  - Pan
- Adjust
  - Hue Shift
  - Saturation
  - Contrast
  - Invert Colors
- Effects
  - Sharpen
  - Blur




124%

[Save](#) [Cancel](#)

Click on [Edit](#) or [View Status Photo](#) to enter a description of the photo or to change the current status photo.

**Status Photo**



Title

Upload Date

Description

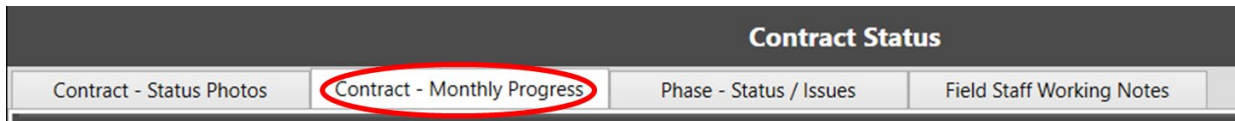
[Title](#) and [Upload Date](#) reflect the file name and upload date of the displayed photo. This information cannot be changed.

[Description](#): Enter descriptive information about the photo, such as where it was taken, when it was taken, what it is showing, etc.

Click on the [Back](#) button twice to return to the [Contract Menu](#).

### 5.3.2 Contract—Monthly Progress

Select the second tab in the [Contract Status](#) module to schedule and track a contract's monthly progress.



#### 5.3.2.1 Scheduled Progress

This tab contains an auto-update process that keeps the Actual progress up to date for the previous month or when any Progress Payments have been completed in that month. The [% Progress Scheduled](#) can also be updated by clicking on the [Update Scheduled Progress](#) button.

This will present a prompt to select a method to use for the update from a drop-down menu. After making a selection, click on **OK** to continue.

Contract Status							
Contract - Status Photos		Contract - Monthly Progress		Phase - Status / Issues		Field Staff Working Notes	
Monthly Progress							
Month	Through Progress Payment	Date Payment Approved	% Earnings to Date	Actual % Progress Update Status	% Progress Scheduled	% Actual Progress	
> Sep 2011				01/22/2019 - Progress updated by McGuire	0	1	
Oct 2011				10/31/2011 - No progress reported	0	0	
Nov 2011				11/30/2011 - No progress reported	0	0	
Dec 2011	1	12/01/2011	1%	01/23/2022 - Progress updated by Rusum	0	1	
Jan 2012	3	01/25/2012	2%	02/22/2018 - Progress updated by May	0	10	
Feb 2012	5	02/17/2012	4%	02/17/2012 - Progress updated by Payment 5	0	4	
Mar 2012	6	03/23/2012	5%	03/23/2012 - Progress updated by Payment 6	0	5	
Apr 2012				03/23/2012 - Progress updated by Payment 6	0	10	
May 2012	7	05/03/2012	7%	05/03/2012 - Progress updated by Payment 7	1	7	
Jun 2012	9	06/21/2012	11%	06/21/2012 - Progress updated by Payment 9	1	11	
Jul 2012	10	07/25/2012	13%	07/25/2012 - Progress updated by Payment 10	1	13	
Aug 2012	11	08/22/2012	16%	08/22/2012 - Progress updated by Payment 11	2	16	
Sep 2012	12	09/12/2012	20%	09/12/2012 - Progress updated by Payment 12	2	20	
Oct 2012	13	10/19/2012	25%	10/19/2012 - Progress updated by Payment 13	2	25	

Update Scheduled Progress      Copy Placement      Scheduled Progress updated using S Curve Standard S Curve on 02/13/2024

Actual Progress through Aug 2024 reported on Status Report      20% Actual vs. 11% Scheduled Progress - 9% Ahead

RMS

**Scheduled Progress is the plan for timely completion.**

**Actual Progress compared to Scheduled Progress indicates whether the contractor is ahead of or behind schedule.**

**RMS will maintain established % Progress Scheduled values for the duration of the contract in order to facilitate this comparison. However, the capability to update is available, if needed, using any of the methods listed below.**

Manually Update Scheduled Progress

- Manually Update Scheduled Progress
- Update Using S Curve from District Library
- Update Using Contractor's early activity schedule
- Update Using Contractor's mid-float activity schedule
- Update Using Contractor's late activity schedule
- Copy Actual/Projected % Placement

OK      Cancel

**Manually Update Scheduled Progress:** For each month in the table, enter cumulative monthly progress; begin with 0 and end at 100. The months displayed are determined by the NTP Acknowledged milestone date and run through the Construction Completion milestone date.

**Update Using S Curve from District Library:** Select a curve from one of the curve templates stored in [District Library | Construction S Curves](#).

Set the curve parameters. Enter a number in the **+ days** field to specify the number of days before (-) or after (+) the NTP/Finish date occurs. For Finish Date, choose between **Scheduled Construction Completion** and **Contract Required Completion**.

Click on **Update** to continue.

**Scheduled Progress Update - S Curve**

**S Curve Templates** Search  Export

Drag a column header and drop it here to group by that column

>	Title	Remarks
	Hannum Curve (more conservative from LRL)	What P2 uses (from LRL) virginia added
	Old BDO Experience Curves (12 Months)	Paper from Hulteng days virginia added
	Old BDO Experience Curves ~24 Months	Paper use every other virginia added
	Sine Squared Curve	Moderate Placement
	Standard S Curve	Conservative Placement
	test	
	TST	
	New placement curve	Test sample

Start Date NTP +/-  days

Finish Date: Scheduled Construction Completion +/-  days

Update

**Update Using Contractor's early activity schedule:** If there is an approved Contractor's NAS in RMS, this selection will estimate scheduled progress based on the NAS's Early Start Dates.

**Update Using Contractor's mid-float activity schedule:** If there is an approved Contractor's NAS in RMS, this selection will estimate scheduled progress based on the NAS's mid-float start dates. The mid-float is calculated by subtracting the median value of the Early and Late Finish Dates from the median value of the Early and Late Start Dates.

**Update Using Contractor's late activity schedule:** If there is an approved Contractor's NAS in RMS, this selection will estimate scheduled progress based on the NAS's Late Start Dates.

**Copy Actual/Projected % Placement:** Select this option to have progress match placement. Go to **Schedules | Placement Schedule** to see the placement graph and the parameters used in its calculation.

### 5.3.2.2 Actual Progress

The **% Actual Progress** will automatically update when a user opens the module at the beginning of each month for the previously completed month. Updates are made based on the following conditions:

1. If a payment was approved in CEFMS for the month and no manually updated entries were added.
2. If a user manually updated the **% Actual Progress**, but the approved payment's percentage of activities completed is greater than the manually updated percentage.

Monthly Progress							
Month	Through Progress Payment	Date Payment Approved	% Earnings to Date	Actual % Progress Update Status	% Progress Scheduled	% Actual Progress	
Apr 2001	3	04/30/2001	6%	04/30/2001 - Progress updated by Payment 3		6	6
May 2001	4	05/30/2001	8%	05/30/2001 - Progress updated by Payment 4		9	8
Jun 2001				05/30/2001 - Progress updated by Payment 4		12	8
Jul 2001				05/30/2001 - Progress updated by Payment 4		15	8

The month used to report the **% Actual Progress** on the Contract Status Sheet is displayed in the bottom left corner of the view.

Contract Status							
Contract - Status Photos		Contract - Monthly Progress		Phase - Status / Issues		Field Staff Working Notes	
Monthly Progress							
Month	Through Progress Payment	Date Payment Approved	% Earnings to Date	Actual % Progress Update Status	% Progress Scheduled	% Actual Progress	
> Nov 2022				11/30/2022 - No progress reported	0	0	
Dec 2022	1	12/21/2022	3%	12/14/2023 - Progress updated by Devancy	0	0	
Jan 2023				01/31/2023 - No progress reported	0	0	
Feb 2023				02/28/2023 - No progress reported	0	0	
Mar 2023				03/31/2023 - No progress reported	0	0	
Apr 2023				04/30/2023 - No progress reported	0	0	
May 2023	1	05/16/2023	1%	12/14/2023 - Progress updated by Devancy	1	10	
Jun 2023				12/14/2023 - Progress updated by Devancy	1	10	
Jul 2023				12/14/2023 - Progress updated by Devancy	1	18	
Aug 2023				12/14/2023 - Progress updated by Devancy	2	37	
Sep 2023				12/14/2023 - Progress updated by Devancy	2	40	
Oct 2023	2	10/25/2023	96%	12/14/2023 - Progress updated by Devancy	1	50	
Nov 2023				12/14/2023 - Progress updated by Devancy	1	56	
Dec 2023	2	12/07/2023	24%	02/01/2024 - Progress updated by Jennifer	24	59	

Update Scheduled Progress      Copy Placement      Scheduled Progress updated by Jennifer on 05/08/2025

Actual Progress through Apr 2025 reported on Status Report      100% Actual vs. 75% Scheduled Progress - 25% Ahead

Click on the **Back** button to return to the **Contract Menu**.

### 5.3.3 Phase—Status/Issues

Select the third tab to communicate information on the status of the contract. The information entered here is used to populate notes on the status of construction in P2 and can be outputted on the [Contract Status Sheet](#). This report may be acceptable to the Contracting Officer for satisfying the requirement for a monthly COR Report. When the contract consists of multiple phases, it is possible to report on each phase separately.

**Contract Status**

Contract - Status Photos
Contract - Monthly Progress
Phase - Status / Issues
Field Staff Working Notes

**Contract W912UM-05-D-0015 0005 - (Single phase)**

**Issues**

Contract Status: 3 - Facility Accepted by Using Service - Without Defic    Primary Delay Code: D0 - No Current Problems (All Phases)

Remarks:     Issues/Remarks as of:

Issues Customer: DO awarded on 28 Sep 09  
CCD: 15 Nov 2010  
Actual completed date except Mod # 07: 10 Dec 2010  
CCD for Mod No. 07: 29 Jun 11.

Issues USACE: DO awarded on 28 Sep 09  
CCD: 15 Nov 2010  
Actual completed date except Mod # 07: 10 Dec 2010  
CCD for Mod No. 07: 29 Jun 11.

P2 Project Issues Customer:

P2 Project Issues USACE:

**Cost / Time Growth**

Current Contract Including Completed Mods (Code 6)				Approved Contract Including Approved Changes (Code 5)				Proposed Contract Including Proposed Changes (Code 4)			
Base Award	\$4,218,923.40	413 days		Current Contract	\$4,274,283.33	438 days		Approved Contract	\$4,274,283.33	438 days	
Options/Definitizations	\$0.00	0 days		Options/Definitizations	\$0.00	0 days		Options/Definitizations	\$0.00	0 days	
<b>Original Contract</b>	<b>\$4,218,923.40</b>	<b>413 days</b>		<b>Orig Approved Contract</b>	<b>\$4,274,283.33</b>	<b>438 days</b>		<b>Orig Proposed Contract</b>	<b>\$4,274,283.33</b>	<b>438 days</b>	
Controllable Mods	\$47,983.55	0 days		Controllable Mods	\$0.00	0 days		Controllable Mods	\$0.00	0 days	
Uncontrollable Mods	\$7,376.38	25 days		Uncontrollable Mods	\$0.00	0 days		Uncontrollable Mods	\$0.00	0 days	
<b>Current Contract</b>	<b>\$4,274,283.33</b>	<b>438 days</b>		<b>Approved Contract</b>	<b>\$4,274,283.33</b>	<b>438 days</b>		<b>Proposed Contract</b>	<b>\$4,274,283.33</b>	<b>438 days</b>	
Controllable Growth		Total Growth		Controllable Growth		Total Growth		Controllable Growth		Total Growth	
% Cost	% Time	% Cost	% Time	% Cost	% Time	% Cost	% Time	% Cost	% Time	% Cost	% Time
1.1%	0.0%	1.3%	6.1%	1.1%	0.0%	1.3%	6.1%	1.1%	0.0%	1.3%	6.1%
Original Required Completion: 11/15/2010				Approved Required Completion: 12/10/2010				Proposed Required Completion: 12/10/2010			
Current Required Completion: 12/10/2010											

**Recommendation:** Update the status monthly on a regular basis prior to the District's monthly line item review to ensure the latest information is always available during the discussions.

**Contract Status:** Click on the box and select the applicable status code from the *Status Code Lookup* list, then click on **OK**.

**Primary Delay Code:** Click on the box and select the applicable delay code from the *Primary Delay Code Lookup* list, then click on **OK**. Select the code that most accurately describes the reason for actual, lagging, or scheduled progress. If the contract is on schedule, select code D0.

**Remarks:** Enter a brief (75-character limit) comment describing a significant current issue.

**Issues/Remarks as of:** Enter the cutoff date of the information presented on the report.

**Issues Customer:** Describe any issues that are of special interest to the Customer. This memo field has no character limit. The Customer will be able to view this so be aware of the information entered here.

**Issues USACE:** Describe any issues that are of special interest to USACE. This memo field has no character limit. It is possible to omit this field from the Contract Status Sheet, so including information that is not suitable for the Customer to see can still be reported here.

**P2 Project Issues Customer:** This is a READ ONLY field that displays what the Project Manager has entered in P2 regarding the project.

**P2 Project Issues USACE:** This is a READ ONLY field that displays what the Project Manager has entered in P2 regarding the project.

**Cost/Time Growth:** Recap of scenarios displaying the Contract Amount and Completion Date from the incorporating completed, approved, and proposed changes showing the impact on Cost and Time growth.

The data for the **Cost/Time Growth** section is pulled from the **Current CLINs**, **Contract Modifications**, **Contract Changes**, and **Milestone Schedule** modules within RMS. This view gives users a high-level view of current, upcoming, and potential changes.

There are three parts to this section.

At the bottom of each part, there is a calculated date for the **Contract Required Completion** based on the modifications and/or changes displayed plus the current value of the **Milestone Schedule's Contract Required Completion** Scheduled Date.

The parts can be broken down as follows:

1. The **Current Contract including Completed Mods (Code 6)** table reflects the current CLINs that have been applied to the contract at the time this view is displayed.
  - a. The **Base Award** shows the total of award CLINs and the duration that was applied at the start of the contract.
  - b. The **Options/Definitizations** are the amounts and durations added via modifications using reason codes 5 or I (letter i), as these are award option changes.
  - c. The **Original Contract** is the total of A and B.
  - d. Controllable and Uncontrollable changes on the contract are listed separately in the **Controllable Mods** and **Uncontrollable Mods** fields within the table.
  - e. **Current Contract** is the **Original Contract** plus the **Controllable Mods** and **Uncontrollable Mods**
  - f. The growth of the contract showing how much the contract increased since award due to modifications that have been completed will be shown as percentages at the bottom.
2. The **Approved Contract including Approved Changes (Code 5)** table reflects the upcoming changes to the contract.
  - a. This table will display the same information as above with the addition of any modifications that have change requests linked, but which have not yet been

completed. This allows users to see the potential impact those modifications will have on the contract.

3. The **Proposed Contract including Proposed Change (Code 4)** table reflects the potential changes to the contract.
  - a. This table will also provide the same information as the Current Contract including Completed Mods (Code 6) table with the addition of all change requests that are present in the contract (excluding any cancelled changes) but not linked to any modification.
  - b. This allows users to see the potential impact that those changes could have on the contract.

To determine which contract change will be used in the calculation check the **Status Code** column in the **Contract Changes** List Selection View.

- Change Requests with a **Status Code** of 4 will go into the **Proposed Contract including Proposed Change (Code 4)** table.
- Change Requests with a **Status Code** of 5 will go into the **Approved Contract including Approved Changes (Code 5)** table.
- Change Requests with a **Status Code** of 6 will go into the **Current Contract including Completed Mods (Code 6)** table.

Click on the **BACK** button to return to the **Contract Menu**.

### 5.3.4 Field Staff Working Note

The **Field Staff Working Notes** tab can be used to enter comments regarding the status of the contract at the contract level, rather than at the phase level. The **Field Notes** field available here is free text entry.

The screenshot shows the 'Contract Status' interface. At the top, there are several tabs: 'Contract - Status Photos', 'Contract - Monthly Progress', 'Phase - Status / Issues', and 'Field Staff Working Notes'. The 'Field Staff Working Notes' tab is highlighted with a red circle. Below the tabs, there is a section titled 'Optional working notes to be used as needed by field staff' containing a large text area labeled 'Field Notes'.

The information entered here can be exported via a report that can be found in the **Contract Reports** module.

The screenshot shows the 'Contract Reports' module. At the top, there are several report categories with counts: 'All Reports' (95), 'Administration Reports' (22), 'Financial Reports' (24), 'QA/QC Reports' (29), 'Submittal Reports' (6), 'Schedule Reports' (8), and 'Closeout Reports' (6). Below this, there is a search bar with 'field' entered and an 'Export' button. The main area shows a table of reports. The first report is highlighted with a red box:

Report Title	Report Menu	Author	Developed By
Field Staff Working Notes	ADMIN	RMS Center	RMS Center

## 5.4 Contract Personnel

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>	<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>		<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>			
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>	<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>		<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>			
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>	<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>		<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>			
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>	<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>		<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>			
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>	<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>		<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>			

This module consists of two parts, identification of Project Delivery Team Members and a list of individuals authorized to access the contract.

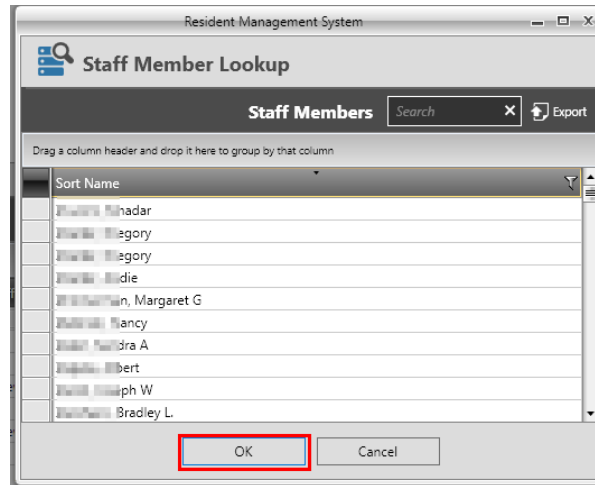
Project Delivery Team Members					
Name	Position Title	Date started	Date finished	Team Member active?	
MDC, Test	Chief, Admin Branch	09/10/2010		<input checked="" type="checkbox"/>	
TESTER, TEST	Engineer	03/07/2011	05/04/2013	<input type="checkbox"/>	
User, Test	Architect			<input checked="" type="checkbox"/>	

Staff					
Sort Name	RMS ID	Office Name	Active	Last Logged In	
., AE JACOBS/DLA	AEJACOBSD	New Cumberland Resident Office	<input type="checkbox"/>		
., AE SUMMER	AESUMMER	T2 Baltimore Test District	<input checked="" type="checkbox"/>		
., AE/DLA	AESUMMERD	New Cumberland Resident Office	<input checked="" type="checkbox"/>		
., AE-GA&A / DLA	AE DLA	T2 Baltimore Test District	<input type="checkbox"/>		
., ENGRG DIV	ENGRG	T2 Baltimore Test District	<input checked="" type="checkbox"/>		
<Name not set>	ABC123		<input checked="" type="checkbox"/>		
<Name not set>	T		<input checked="" type="checkbox"/>		
<Name not set>	HQRMSTTL	T2 Baltimore Test District	<input checked="" type="checkbox"/>		
<Name not set>	test321		<input checked="" type="checkbox"/>		
<Name not set>	test123		<input type="checkbox"/>		

### 5.4.1 Project Delivery Team Members

Click on the **Add** widget to add a team member. Select the team member from the *Staff Member Lookup* list, then click on **OK**.

Project Delivery Team Members					
Name	Position Title	Date started	Date finished	Team Member active?	
MDC, Test	Chief, Admin Branch	09/10/2010		<input checked="" type="checkbox"/>	
TESTER, TEST	Engineer	03/07/2011	05/04/2013	<input type="checkbox"/>	
User, Test	Architect			<input checked="" type="checkbox"/>	



Click on the [Back](#) button twice to return to the [Contract Menu](#).

## 5.4.2 Editing Contract Personnel Entries

Double click on the staff member listed in the Project Delivery Team Members section to open the Contract Personnel edit view.

**Staff Member:** The previously selected staff member may be changed here.

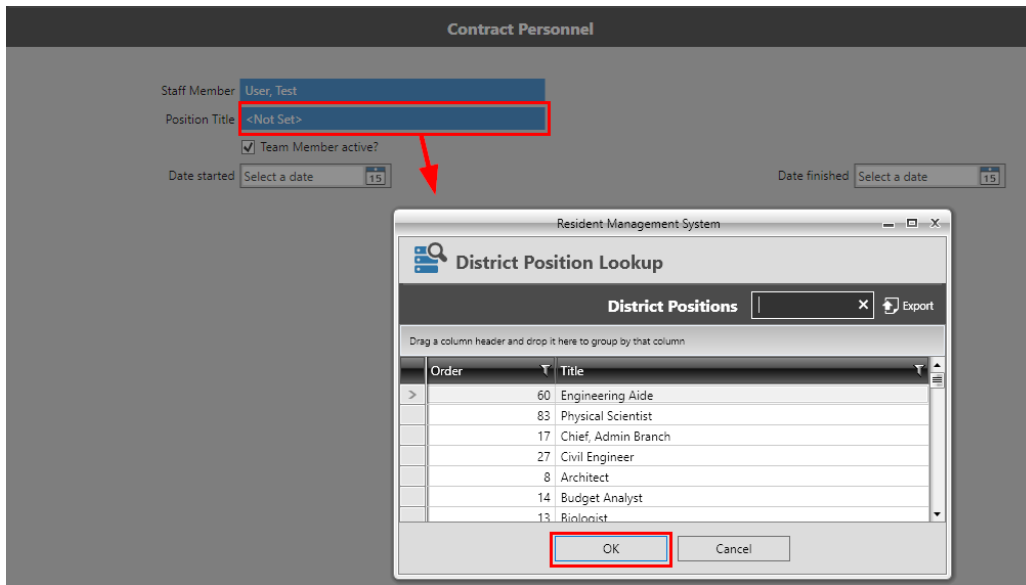
**Position Title:** RMS will automatically insert [Position Title](#) assigned to the selected staff member in the [RMS Staff](#) library. However, if this person has a different function on this PDT, an alternate [Position Title](#) may be selected from the [District Positions Lookup](#) list as shown below.

**Note:** A single staff member can be added under multiple Position Titles, if needed. Add an additional User Role for the same staff member and make the desired selection for the additional Position Title.

**Team Member active?:** Check this box to signify whether or not the staff member is active on the contract.

**Date started/finished:** Enter staff member's start and finish dates on the contract.

Click on [OK](#) when done, then click on the [Back](#) button to return to [Contract Personnel](#).



## 5.5 Contract Documents

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>	<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>	<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>	<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>	<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>	<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>	<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>	<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>	<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>	<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>	<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>	<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>	<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>				

This module is READ ONLY, containing only those documents that were stored in RMS 2.38. It has very little use in most contracts today.

## 5.6 Contract File

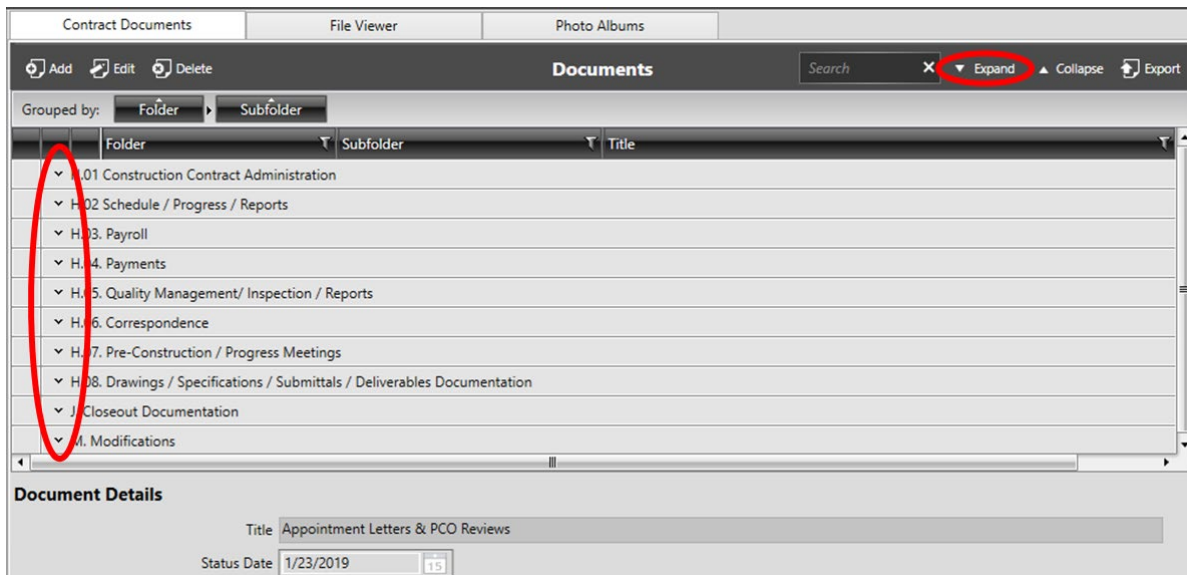
Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>	<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>	<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>	<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>	<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>	<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>	<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>	<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>	<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>	<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>	<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>	<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>	<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>				

This module keeps track of the status of the documents that are generated in a contract in RMS, the required repository for all official contract documents. In addition to this feature, documents

that are not preprogrammed or are attached to RMS from an outside source can also be manually added.

### 5.6.1 Contract Documents

When the **Contract File** module is first accessed, the **Contract Documents** tab will be displayed with the document list in a collapsed set of groups based on where the document was uploaded in RMS. To see the complete list of all documents, click on the **Expand** widget. To view selected areas only, click on the down arrow adjacent to the group of interest.



**Note:**

- 1) If a folder is not displayed in the **Contract File** module, then no documents have been created within those modules.
- 2) Due to changes with **PII** data, if the user's account does not have **PII** rights, the Labor folder will not display in the list even if Document Packages are present.

After expanding the view, users will be able to see the folder and subfolder that each document resides within as well as all the document titles.

The screenshot displays the 'Documents' module interface. At the top, there are tabs for 'Contract Documents', 'File Viewer', and 'Photo Albums'. Below these are 'Add', 'Edit', and 'Delete' icons, followed by the 'Documents' title, a search bar, and 'Expand', 'Collapse', and 'Export' options. The main area shows a tree view of folders and subfolders, with a table of documents. The 'Title' column of this table is highlighted with a red box. Below the table, the 'Document Details' section is visible, showing the selected document's information.

Folder	Subfolder	Title
^ H.06. Correspondence		
v 01. Correspondence Logs		
v 02. Incoming Correspondence / Documents / Memoranda		
v 03. Miscellaneous Correspondence / Documents / Memoranda - Construction		
v 04. Other Contract Documents		
v 05. E-Mail Correspondence		
v 06. Requests for Information		
^ 07. Outgoing Correspondence / Documents / Memoranda		
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No.
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No.
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No. [X]
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No. [X]
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No. [X]
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No. C-0007 - Test.pdf
H.06. Correspondence	07. Outgoing Correspondence / Docume	Letter No. C-0014 - 2013 Apr 25

**Document Details**

Title: Letter No. C-0018 - 2013 Apr 25

Status Date: 4/25/2013

Document Status: Document not Ready

Errors: None

There are two primary statuses for files uploaded in RMS and shown in the **Contract File** module.

- **Document not Ready:** The document is still in process in an area within RMS.
- **Accepted:** The document was accepted, and the operation is complete.

Select an individual file to display some document details in the bottom section.

The screenshot shows the 'Document Details' section for a selected document. The title is 'Letter No. C-0001 - Site.jpg', the status date is '9/19/2024', the document status is 'Accepted', and there are no errors.

**Document Details**

Title: Letter No. C-0001 - Site.jpg

Status Date: 9/19/2024

Document Status: Accepted

Errors: None

### 5.6.1.1 Add Documents to Contract File

Most documents are added through the [Document Package](#) process, and this allows the status to be set automatically by RMS. To add a document manually, click on [Add](#). Select the [Document Folder](#) where the file will go from the [Sections](#) lookup list, then click on [OK](#). The [Sections](#) lookup list contains all the types of documents that are considered official contract documents.

**Note:** The COR is responsible for ensuring all the contract's official contract documents generated during construction are filed in the [Contract File](#) module. Consult the District policy on the procedures for ensuring compliance with this requirement.

Folder	Subfolder	Title
▼ H.01 Construction Contract Administration		
▼ H.02 Schedule / Progress / Reports		
▲ H.03. Payroll		
▼ 01. Weekly Payroll Affidavits		
▲ 03. Labor Standards Interviews (SF 1445)		
H.03. Payroll	03. Labor Standards Interviews (SF 1445)	Labor Interview QA-00008 6202012 - Archiving Contracts.pdf
H.03. Payroll	03. Labor Standards Interviews (SF 1445)	Labor Interview QA-00008 6202012 - GeneratedDocument.docx
H.03. Payroll	03. Labor Standards Interviews (SF 1445)	Labor Interview QA-00012 3/13/2013 - Some Doc with Pll.docx
▼ 04. Request for Additional Classification and Rate (SF 1444)		
▼ H.04. Payments		
▼ H.05. Quality Management/ Inspection / Reports		
▼ H.06. Correspondence		
▼ H.07. Pre-Construction / Progress Meetings		
▼ H.08. Drawings / Specifications / Submittals / Deliverables Documentation		



Title	Folder	Subfolder
> Conformed Contract	H.01 Construction Contract Administration	01. Conformed Contract
Notice to Proceed	H.01 Construction Contract Administration	02. Notice to Proceed
Bidder Inquiries	H.01 Construction Contract Administration	03. Bidder Inquiries
Appointment Letters & PCO Reviews	H.01 Construction Contract Administration	04. Government Appointment Letters
Apprentice Certificates	H.01 Construction Contract Administration	05. Apprentice Certificates
Insurance Certificates	H.01 Construction Contract Administration	06. Insurance Certificates
List of Subcontractors	H.01 Construction Contract Administration	07. List of Subcontractors
Preconstruction Documents	H.01 Construction Contract Administration	08. Preconstruction Documents
Statement and Acknowledgement (SF 1413)	H.01 Construction Contract Administration	09. Statement and Acknowledgment (SF 1413)
Surety Information	H.01 Construction Contract Administration	10. Surety Information
Baseline Activity Schedule	H.02 Schedule / Progress / Reports	01. Initial and Baseline Schedules



**RMS Document**

Status: Document not Ready

**Document not Ready**

Completed 3

**Attached Document**

Generate Document 1      Edit Document      Sign Document

Select Document 1      Remove Document      View Document

Save Document

Use the *Generate Document* or *Select Document* buttons to add a document. 1

The remaining buttons in this section allow users to take the corresponding action on the document that has been added. 1

Application should include CUI markings. Attachments may be used in the application. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

**Brief Summary**

File Name: NONE

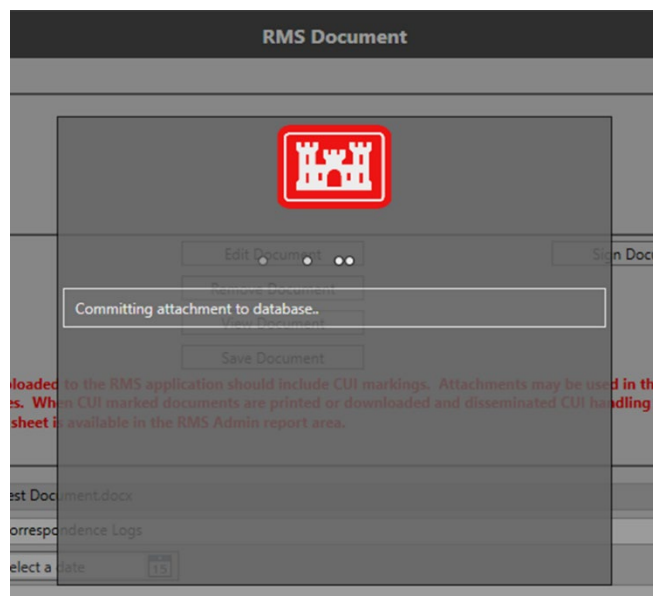
Document Title: Correspondence Logs

Date of the Document: Select a date

Description 2 Enter a summary of the document here.

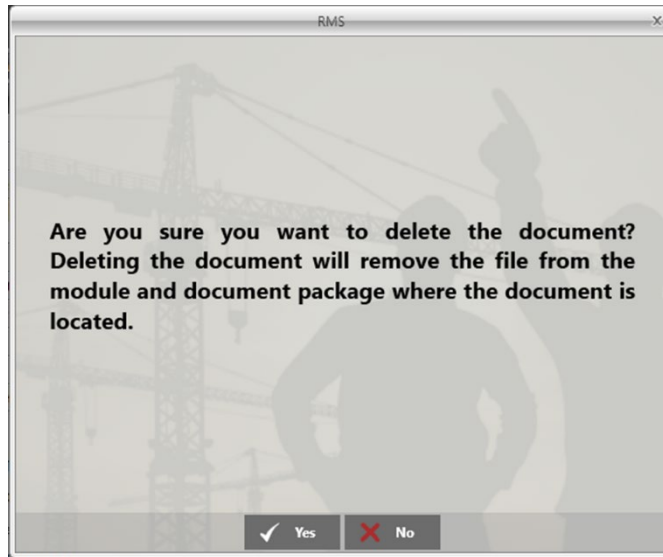
**Note:** Once a document has been completed or the Document Package in which the document resides is completed, no further action can be taken on that document. This includes editing, removing, and/or signing actions. However, full district administrators do have the permission to delete documents and Document Packages that have been completed or accepted. See the section on [Delete Documents from Contract File](#) for more information.

If adding a file takes longer than usual to upload, RMS will provide indication that the document is being retrieved through the loading screen shown below.

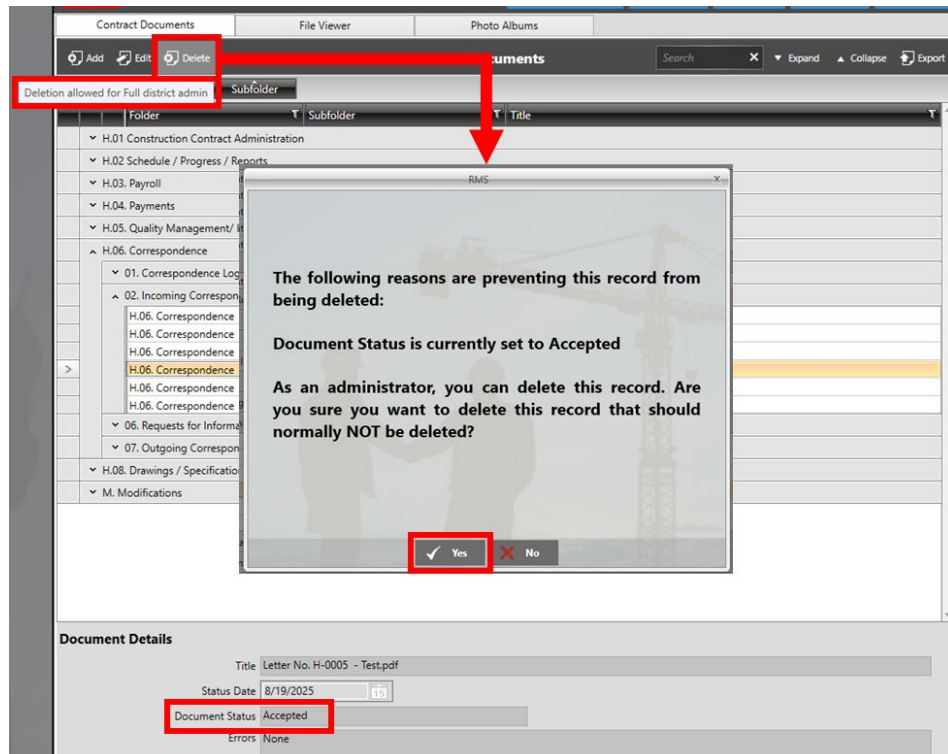


### 5.6.1.2 Delete Documents from Contract File

Select a document and click on the **Delete** button to remove a document from the list. This action will remove the file from the **Contract File** module as well as from the Document Package where the document is located. A pop-up confirmation will appear when attempting to delete a file, as shown in the image above. Click **Yes** to confirm deletion.



Documents that have already been marked as accepted can be deleted by full district administrators only. To do this, select the accepted document and click the **Delete** button. A pop-up will appear to confirm the delete action.



When deleting accepted documents, a *Document Deletion Reason* will also need to be entered by the user who performed the deletion.

Upon confirming the *Document Deletion Reason*, the user will be prompted for authentication in order to log the time, date, and user who performed the deletion.

**Note:** The *Document Deletion Reason* and authentication windows will also appear when a full district administrator deletes completed/accepted documents and/or Document Packages in other modules outside of the *Contract File* module.

## 5.6.2 File Viewer

All files for the contract will be listed in the *File Viewer* tab. The files are consolidated into one list on this tab and can be sorted or filter via the column filters (funnel icons in the column headers) available in the data grid.

Contract Documents | File Viewer | Photo Albums

**Export Selected Items** | **Document Package Attachments** | Search | Export

Drag a column header and drop it here to group by that column

	Document Title	File Name	Doc Type	Source
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input checked="" type="checkbox"/>	Government QA Report	DOCSIGNED.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	(a) Preconstruction mee	NONE		CONTRACT FILE: (2) Preconstruction Documents
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input checked="" type="checkbox"/>	Invoice No. 24 - 2013 A	DOCSIGNED.PDF		CONTRACT FILE: (1) Progress Payments
<input type="checkbox"/>	RFI No. RFI-0267 - 2013	RFI.PDF		CONTRACT FILE: (9) Requests for Information
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input checked="" type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	RFI No. RFI-0279 - 2013	RFI.PDF		CONTRACT FILE: (9) Requests for Information
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Government QA Report	QAR.PDF		CONTRACT FILE: (2) Government QA Reports
<input type="checkbox"/>	Letter No. C-0019 - 201	USACE Ltr C-0019_Req		CONTRACT FILE: (2) Letters to Contractor

Document Date: 1/29/2013 | **Save Document to File** | **View Document**

Document Title: Government QA Report - 2013 Jan 29

Description: [Empty field]

Manually signed by Contractor  
 Manually signed by Government

Preview is not available

### 5.6.2.1 Saving/Viewing Individual Documents

To save a single document, select the document and click on the [Save Document to File](#) button. The [View Document](#) button will open the document in the corresponding application (i.e., Microsoft Word, Adobe, etc.).

The bottom section of the [File Viewer](#) tab will display information for the selected file, and if the file is an image, a preview of the image will be displayed, as well. Click the [Expand Image](#) button to enlarge the preview.

QA Daily Report No. 10 | 20200721\_161841.jpg | JPG | QA Daily Report No. 1048(2)

QC Daily Report No. 11 | 0530221436\_HDK.jpg | JPG | DOCUMENT PACKAGE: QC Daily Report No. 1123

Transmittal 03 42 13.00 | 4025.pdf | PDF | DOCUMENT PACKAGE: Transmittal 03 42 13.00 10-2

Transmittal 01 15 00-1 | 4025.pdf | PDF | DOCUMENT PACKAGE: Transmittal 01 15 00-1(2)

Prompt Payment Inv.2 - Prompt Payment.pdf | PDF | DOCUMENT PACKAGE: Invoice No. 0002

Government Remarks - Transmittal 01 15 00-1 | PDF | DOCUMENT PACKAGE: Transmittal 01 15 00-1(2)

Document Date: 7/9/2022 | **Save Document to File** | **View Document**

Document Title: QA Daily Report no. 1048 - 20200721\_161841.jpg

Description: [Empty field]

Manually signed by Contractor  
 Manually signed by Government

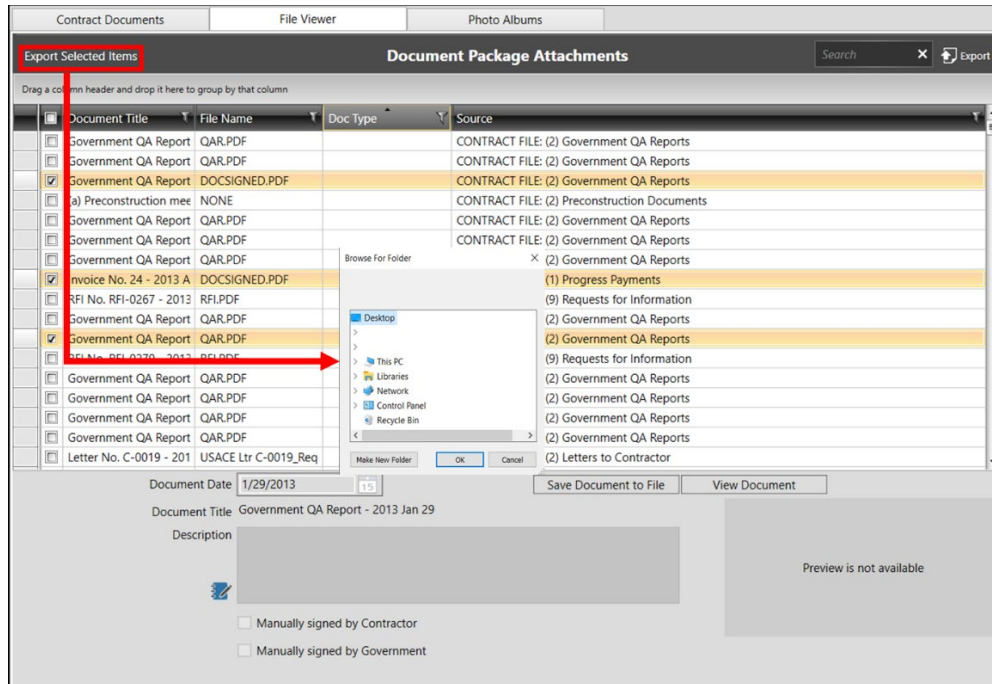
Expand Image

### 5.6.2.2 Saving Multiple Documents

Numerous documents can also be exported from this view by selecting multiple documents by using the checkboxes on the left and then clicking on the [Export Selected Items](#) button. Upon clicking this button, a prompt will appear to choose the desired location within the user's file

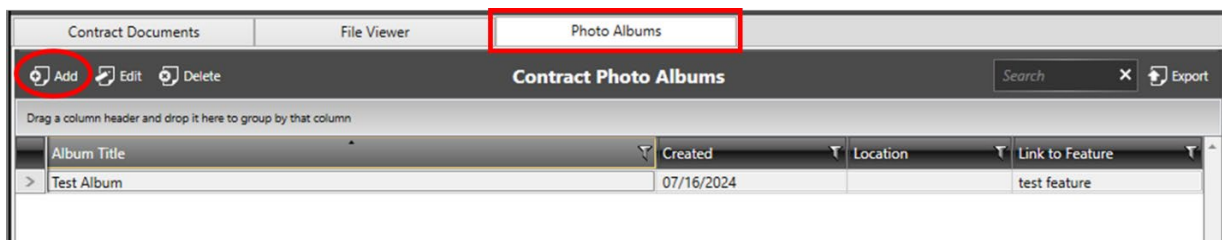
system for the export.

**Note:** The **Export** button in the top right corner of the screen will only export the data grid list of the documents as shown on the screen, not the actual documents. Follow the guidance above to export the actual documents from this view.



### 5.6.3 Photo Albums

The **Photo Albums** tab allows the organization and storage of photos into albums for the contract. Only photos that have already been added to the contract via Contract Documents, Status Photo, or a Document Package can be added to albums in this tab.



Click on the **Add** button to add an album. At creation, RMS will prompt users to provide a **Photo Album Title**. Optionally, the album can be linked to a Feature of Work by clicking the blue box next to the **Feature** field and choosing a feature from the **Feature of Work** lookup field. Click **OK** to confirm.

RMS Add View

### Add Photo Album

The following information is required to add a new Photo Album

Photo Album Title: Construction Site A

(Optional) Select a Feature of Work from the lookup

Feature: <Not Set>

OK Cancel

Resident Management System

### Feature of Work Lookup

Features of Work

Search X Export

Drag a column header and drop it here to group by that column

Feature Title
BUILDERS HARDWARE
ACCESS FLOORING SYSTEM
Concrete Reinforcing
ASPHALT PAVING
Project Schedule
Submittal Procedures

OK Cancel Clear Selection

Then click **OK** to create the new photo album and open the photo album edit view.

### Photo Album

Album Title: Construction Site A

Link to Feature: Concrete Reinforcing

Location:

Add Delete

### Photos in this Album

Search X Export

Drag a column header and drop it here to group by that column

Photo Title	File type	Created
-------------	-----------	---------

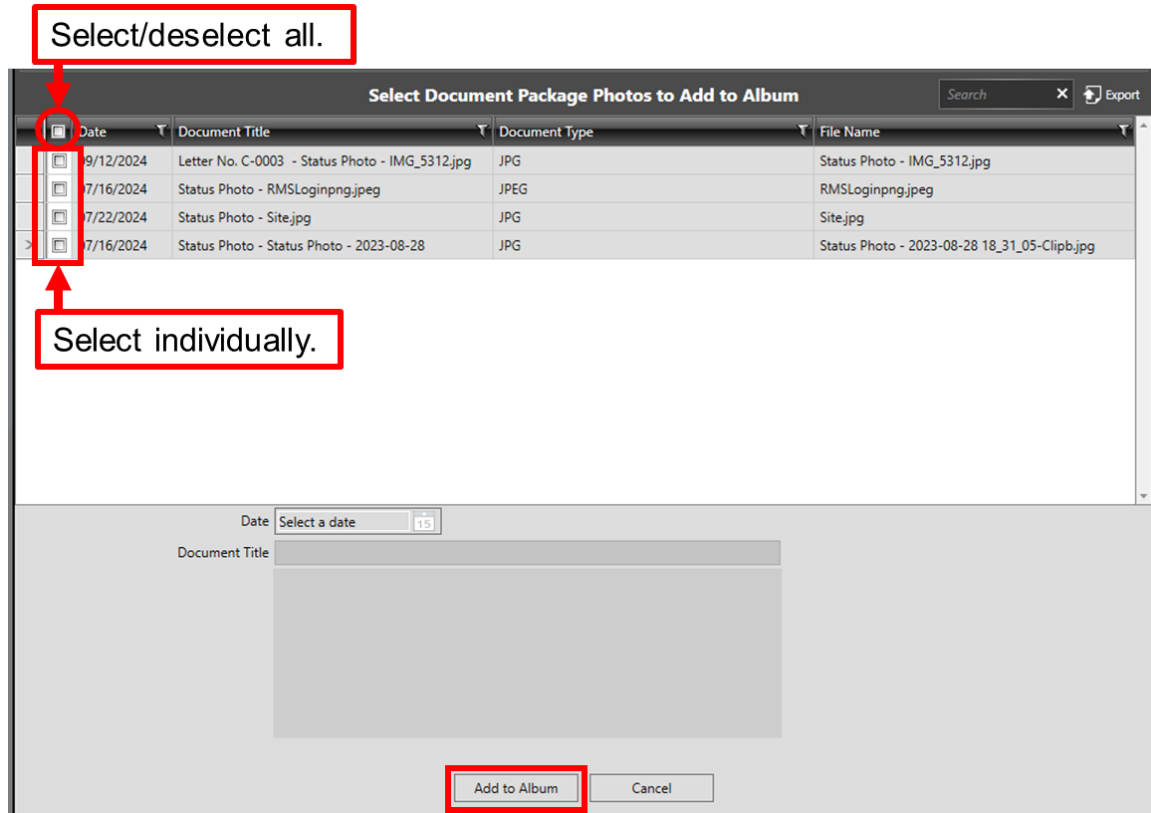
Created: Select a date 15

Photo Title:

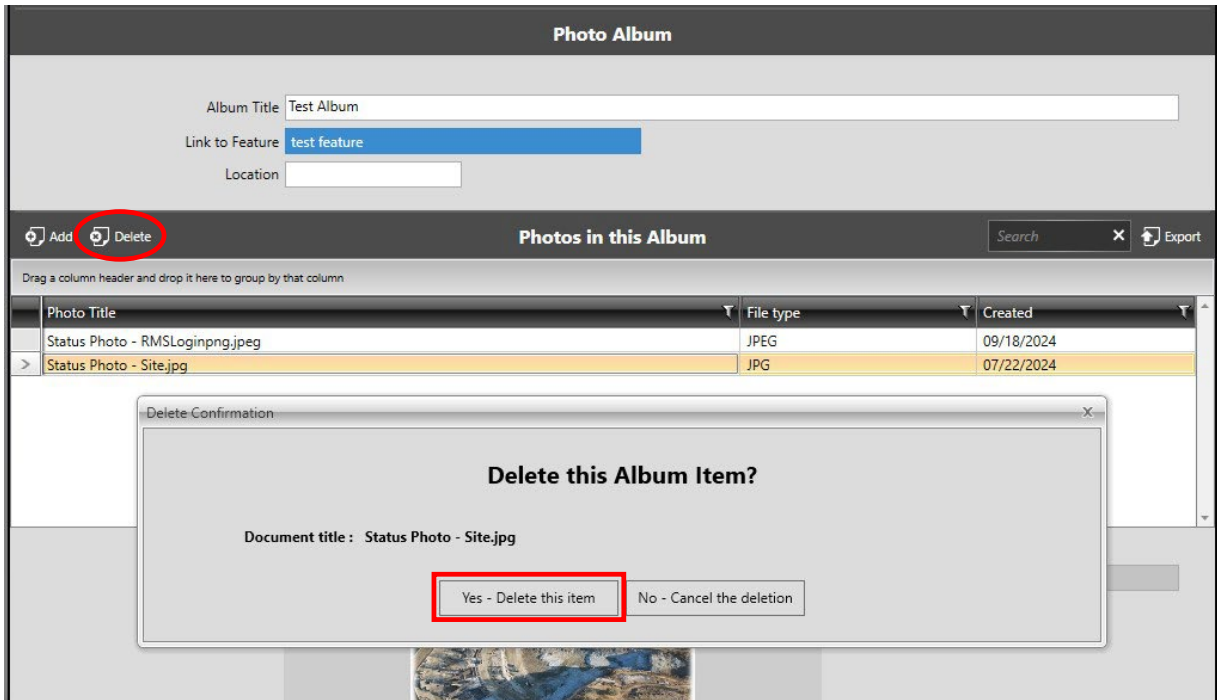
If needed, a location can be specified in the **Location** field in the photo album's edit view, and photos can be added and/or deleted to the album. Details for the photo selected will be displayed at the bottom of the screen.

Click the [Add](#) button to select photos to add to the album.

The screen shown below will be presented to select photos that can be added to the album. Only the photos that already exist in a Document Package within the contract will be available for selection. Individual selections can be made by checking each checkbox for the desired photo(s), or all photos can be selected or deselected by using the checkbox in the top row of the data grid. Once the desired photos have been selected, click on the [Add to Album](#) button to add the selected photos to the photo album.

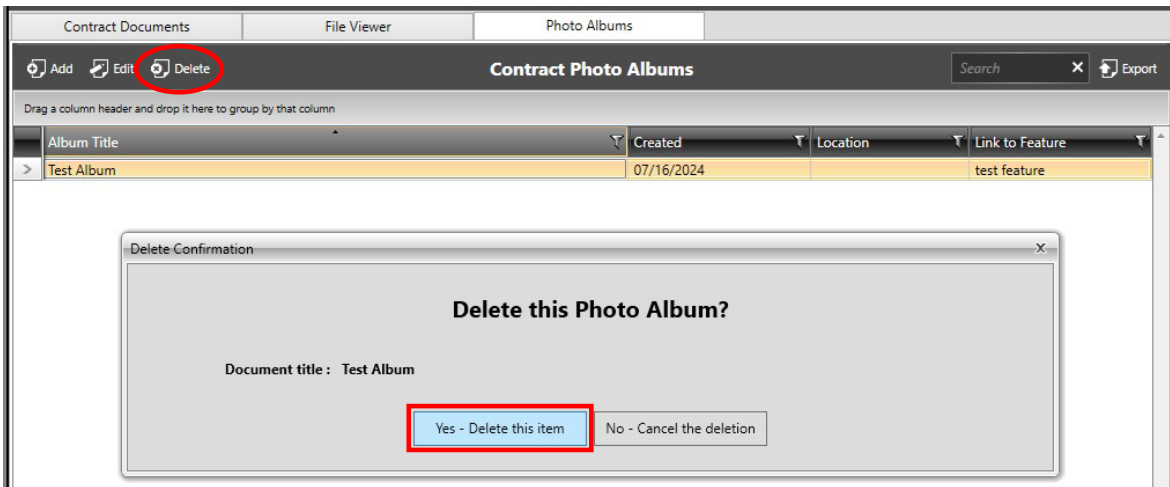


To remove photos from an album, select the photo and click on the [Delete](#) button. RMS will provide a prompt to confirm deletion from the photo album.



**Note:** Deletion of a photo or photo album will not delete the photo(s) from its source location elsewhere in the contract.

Photo albums can also be deleted by selecting the album, clicking the *Delete* button, and confirming the deletion.

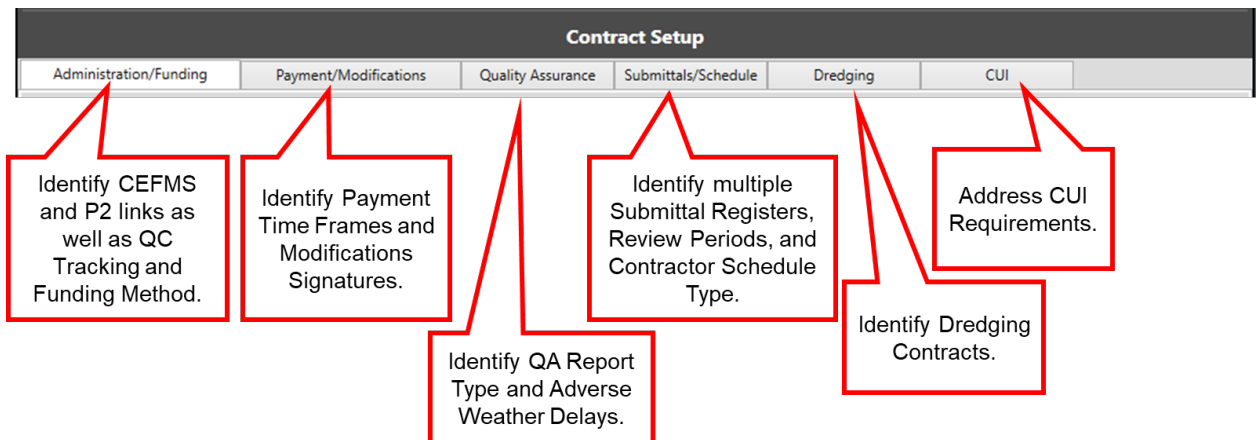


## 5.7 Contract Setup

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>		<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>		<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>		
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>		<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>		<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>		
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>		<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>		<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>		
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>		<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>		<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>		
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>		<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>		<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>		

While RMS looks the same on all contracts, how it is used and the extent to which it is used can be customized using the settings contained in this module. This module consists of 5 sections/tabs that control how RMS is used on the contract. The tabs correspond to the major sections within RMS and two specialized contract types. Only users with Full Office Administrator Rights can edit the settings in this module.

**Recommendation:** As soon as a contract is awarded and added to RMS, select the settings in this module according to District policies. This should be done before users—including the Contractor—are given access to the contract.



## 5.7.1 Administration/Funding

There are two parts to this tab. The *Administration* section addresses how RMS will be used to manage the contract. The *Funding* section addresses how RMS allocates Progress Payments to the contract's approved funding sources.

The screenshot shows the 'Contract Setup' form with the 'Administration/Funding' tab selected. The 'Administration' section contains several checkboxes and dropdown menus. The 'Funding' section is partially visible at the bottom.

Section	Field/Option	Value/Status
Administration	Use CEFMS for downloading Finances and uploading	<input checked="" type="checkbox"/>
	CEFMS Database Name	OMAHA DISTRICT (G6)
	Will this contract be linked to P2?	<input checked="" type="checkbox"/>
	Use P2 data prior to award	<input type="checkbox"/>
	Use only one phase	<input checked="" type="checkbox"/>
	Allow Government to enter Contractor Data	<input type="checkbox"/>
	Track Contractor's Insurance	<input checked="" type="checkbox"/>
	Track Contractor's Payrolls in RMS	<input checked="" type="checkbox"/>
	End Payrolls Milestone	Contractor Final Payment
	Days	± 0
Funding	Funding Method	Track Funding at Funding Account Level, pre-plan Obligations for payment on all CLINS
	Currency Type	US - US DOLLAR

### 5.7.1.1 Administration

Place a checkmark in the box(es) associated with the modules that will be used to manage the contract.

**Use CEFMS for downloading Finances and uploading:** Almost all Corps of Engineers construction contracts use CEFMS to manage its finances. Check this box to link the contract to the CEFMS database. The information needed to facilitate this link is the Contract Number which is entered in *Administration | Contract Description*. The number entered in RMS must match what is entered in CEFMS exactly, including the Delivery Order Number when applicable.

**CEFMS Database Name:** Click on this field to display the list of CEFMS databases from which to choose. This selection is not limited to the current District's database. In cases where the contract was entered in another CEFMS District but is being administered by the currently utilized District, the owning District's database can be selected. If in question, check with the PM and/or Contracting Officer to verify the correct selection.

- AFGHANISTAN N. DISTRICT (N2)
- AFGHANISTAN S. DISTRICT (N3)
- ALASKA DISTRICT (J4)
- ALBUQUERQUE DISTRICT (L4)
- BALTIMORE DISTRICT (E1)**
- BUFFALO DISTRICT (H5)
- CHARLESTON DISTRICT (K2)
- CHICAGO DISTRICT (H6)
- DETROIT DISTRICT (H7)
- EUROPE DISTRICT (E7)
- FAR EAST DISTRICT (J1)
- FORT WORTH DISTRICT (M2)
- GALVESTON DISTRICT (M3)
- GULF REGION DIVISION (P0)
- HONOLULU DISTRICT (J3)
- HUNTINGTON DISTRICT (H1)
- HUNTSVILLE CENTER (A0)
- JACKSONVILLE DISTRICT (K3)

**Will this Contract be linked to P2:** All USACE construction contracts are associated with a project in P2. Therefore, this box should almost always be checked. It may not be appropriate to check this box on contracts created for training or demonstration purposes to avoid contamination of data in P2.

**Use P2 data prior to award:** When future contracts are entered in RMS, usually for the purpose of including these in future placement estimates, checking this box will make use of the estimated dates and values that are entered in P2. Once an Actual Award date is entered, data entered in RMS will take precedence over any P2 data that may have been downloaded.

**Use only one Phase:** Every P2 project has its own set of milestone event dates. When there are more than one P2 projects connected to the contract and this box is NOT checked, RMS will create a **Milestone Schedule** for each project. Check this box to retain only one **Milestone Schedule** regardless of the number of P2 projects linked to the contract.

**Allow Government to enter Contractor Data:** When RMS/CM is used, entry of Contractor data is restricted to the Contractor to avoid multiple and potentially conflicting data entry by the Government. However, there may be instances when the Government needs to enter normally restricted Contractor data. Checking this box will allow this to happen.

**Recommendation:** Activate this setting sparingly. Check the box, enter the needed data, then turn it OFF. Do not leave it ON indefinitely.

**Track Contractor's Insurance:** Check this box if the Prime Contractor's insurance needs to be tracked.

**Track Contractor's Payrolls in RMS:** Check this box if the Prime Contractor's payrolls need tracking. Users can preset which milestone stops payroll generation and how many days before or after that milestone has an actual date by selecting the milestone for the dropdown list and entering the number of days in the days text box:

The screenshot shows a form titled "Track Contractor's Payrolls in RMS". A checkbox is checked. Below it is a dropdown menu labeled "End Payrolls Milestone" which is open, showing three options: "Contractor Final Payment", "Contract Physical Completion", and "Construction Completion". To the right of the dropdown is a text box containing the number "0" and the label "Days".

**Track Labor Interviews:** Check this box if the Labor Interviews need to be tracked.

**Requires a DD1354 Transfer Document:** Check this box if a DD1354 Transfer Document is required.

**Enable FY22 look-ups for DD1354:** Revisions to the Army Real Property category codes can be found and used if this checkbox is checked.

**Category Codes for:** Select the appropriate Category Code for the contract.

The screenshot shows a dropdown menu with the text "Category Codes for" above it. The menu is open, showing a list of options: "ARMY", "ARMY", "NAVY", "USAF", and "WHS". The first "ARMY" option is highlighted.

**Log change in Office location:** This setting will keep track of who changes the *Contract Office* in *Administration | Contract Description*. This is not a common action, but in case it does happen, this will keep track of the person that made the change.

### 5.7.1.2 Funding

**Funding Method:** This very important setting determines how contract funds are spent. How RMS allocates Progress Payment amounts is governed by the selection made here. Click on the box to select from one of the three methods available. The method used on most contracts is the first choice, using pre-planned obligations on all CLINs.

Track Funding at Funding Account Level, pre-plan Obligations	for payment on all CLINS
Track Funding at Project Level, compute Obligation	amounts for payment based on available funds
Track Funding at Project Level, manually enter Obligation	amounts for payment

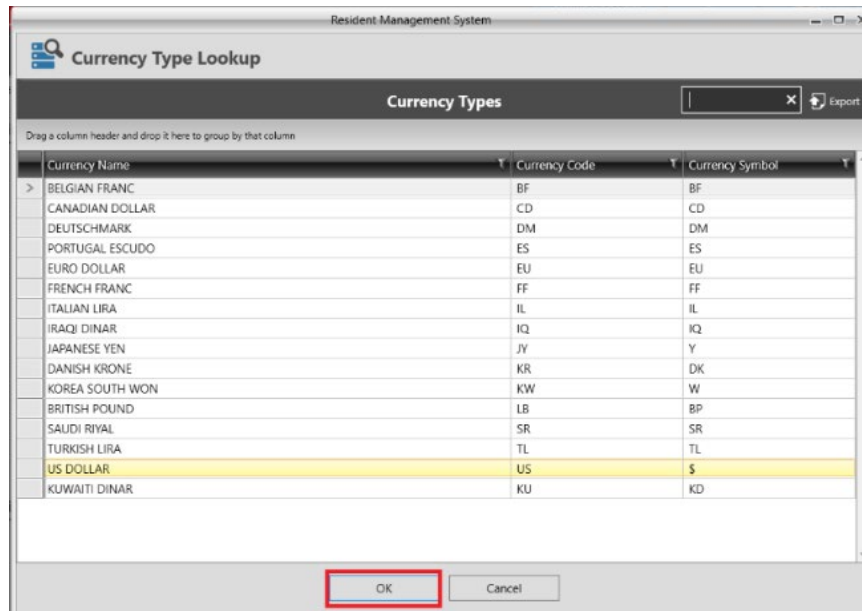
**Pre-Plan Obligations:** With this method, CLINs are automatically only paid from the obligation line from which it is funded in *Finances | Award CLINs*. Almost without exception, Non-Civil Works type contracts should be using this method.

**Compute Obligation:** This method is often used on Civil Works Contracts. With this method, when a CLIN payment is attempted and the Obligation Line from which it is funded runs out of money, the funds are automatically taken from one of the other Obligation Lines in the contract that has remaining money in it.

**Manually Enter Obligation:** Use this method to manually select the Obligation Line from which payment will be deducted for every single Progress Payment. RMS does not make an automatic selection.

**Currency Type:** The Corps of Engineers has contracts in many countries outside of the United States. Contractor payments in these countries are paid in the local currency. RMS includes the flexibility to select different currency types according to the country in which the contract is executed. Click on the box and make the appropriate selection from the *Currency Type Lookup* list. Click on *OK* when done.

If in doubt, check the Contract Award documents and use the type in which the contract was awarded.



## 5.7.2 Payment/Modifications

**Contract Setup**

Administration/Funding | **Payment/Modifications** | Quality Assurance | Submittals/Schedule | Dredging | CUI

**Obligations for Payment**

Obligation Line Item No.	Obligation Title	Oblig Line Item Days	Refund Payment Days	Final Payment Days
00007	R00007-CHG BD: STL BEAM REV SECT D/SF201	14	30	30
00008	R00008-CHGS AS, AV & AX	14	30	30
00009	IN-SCOPE MOD R00010-CHGS BQ&BZ_\$33,205.00	14	30	30
0001	WSOC FORT MEADE, MD	14	30	30
0002	MOD REF NO. R00001_CHANGE AA - SHARED PARTNERING EXPENSES	14	30	30

**Payment**

Progress Payments - Allow Additional Earnings not included in Activity Earnings  Include All Activities on Prompt Payment Document

Default Calculation Method: [Dropdown]

**ACO Modifications**

Issued By: CENAB-COF-WAW - WALTER REED Resident Office [Select Office]

Administered By: CENAB-COF-WA-PF - PFPA Project Office [Select Office]

SF30 Signed By: [User Name]

SF30 ACO Title: Project Manager

**CO Modifications**

Issued By: CENAB-DET-RES - Fort Detrick Resident Office [Select Office]

Administered By: CENAB-DET-RES - Fort Detrick Resident Office [Select Office]

SF30 Signed By: [User Name]

SF30 CO Title: Construction Control Representative

There are multiple parts to this tab. The first part lists all the Obligation Lines that are funding the contract. The Payment section addresses options related to Progress Payments. The last two sections identify responsibility for ACO and CO Modifications.

### 5.7.2.1 Obligations for Payment

All the Obligation Lines that fund the contract are listed showing the Payment Terms that are set up in CEFMS. On construction contracts, the terms are 14/30/30.

**Recommendation:** Verify the Payment Terms are correct for each Obligation Line as soon as the contract is awarded or at least prior to the first Progress Payment. If any of the terms are incorrect, inform the Contracting Officer immediately to get it corrected before the first payment is made.

### 5.7.2.2 Payment

Place a checkmark in the box(es) to activate the provisions of the selected statement.

**Progress Payments—Allow Additional Earnings not included in Activity Earnings:** When activated, this selection allows the Progress Payment to include payment for stored materials, preparatory work, or performance and payment bonds as separate pay items not tied to a Pay Activity. Check the contract for terms that may or may not allow this. Follow the District's policy.

**Note:** Use of this provision will require additional work and vigilance to ensure the amounts are eventually backed out as payment on activities are made, since the sum of activities is equal to the Total Contract Amount and failing to do so will result in payments exceeding the total of the contract.

**Include All Activities on Prompt Payment Document:** To include activities with no payment due and those that are 100% paid on every Progress Payment, select this provision.

**Default Calculation Method:** Select the Default Calculation Method to be used in the contract's Progress Payments. If needed, this setting can be changed within the individual Progress Payments, as well.

Default Calculation Method	<input type="text"/>
Modifications	PERIODIC CALCULATION: Use only information for this period
	STANDARD CALCULATION: Use Total to Date values

### 5.7.2.3 ACO Modifications/CO Modifications

The selections made here will automatically populate Blocks 6 and 7 on the SF30 and the **Government Signature Name** and **Title** fields on the SF30-3 tab in **Finances | Contract Modifications**. While the selected name and title establish a default, another name and/or title can still be manually entered when a modification is created.

**Issued By:** Select the name of the Contracting Office from the Office Lookup list. The selected office should be the same for both ACO and CO Modifications.

**Administered By:** Select the name of the office to which the ACO for this contract belongs from the Office Lookup list. The selected office should be the same for both ACO and CO Modifications.

**SF30 Signed By:** Select the name of the person who will typically sign the modifications for this contract, ACO or CO, as applicable, from the Signature Block Lookup list. A person may have more than one title in the list. Be sure to select the name associated with either Administrative Contracting Officer or Contracting Officer, depending on the mod type.

**SF30 ACO Title:** The selected title should always be *Administrative Contracting Officer*. This field should automatically populate using the title associated with the name selected. However, if the wrong title is selected, it may be manually overwritten.

**SF30 CO Title:** The selected title should always be *Contracting Officer*. This field should automatically populate using the title associated with the name selected. However, if the wrong title is selected, it may be manually overwritten.

### 5.7.3 Quality Assurance

**Contract Setup**

Administration/Funding | Payment/Modifications | **Quality Assurance** | Submittals/Schedule | Dredging | CUI

**Quality Assurance**

QA Report Type: **MILITARY** | Project Engineer: **MDC, Test**  
 On Site COR: **TEST, TEST**

Number of QA Shifts: 3 Shifts

Chief QA Rep - Shift 1: **Testing, Test** | Alternate QA Rep - Shift 1: **test2, test2**  
 Chief QA Rep - Shift 2: **test3, test3** | Alternate QA Rep - Shift 2: **test5, test5**  
 Chief QA Rep - Shift 3: **Test7, Test7** | Alternate QA Rep - Shift 3: **EZ, RMSTEST**

Quality Assurance Units: **US Units** | Border wall group: **NONE**

**Time Extensions due to Unusually Severe Weather**

Contract Expected Work Week: 5 days per week

Anticipated adverse weather days per month based on Contract Expected Work Week											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
0	0	0	0	0	0	0	0	0	0	0	0

Actual Work Week: 0 days per week

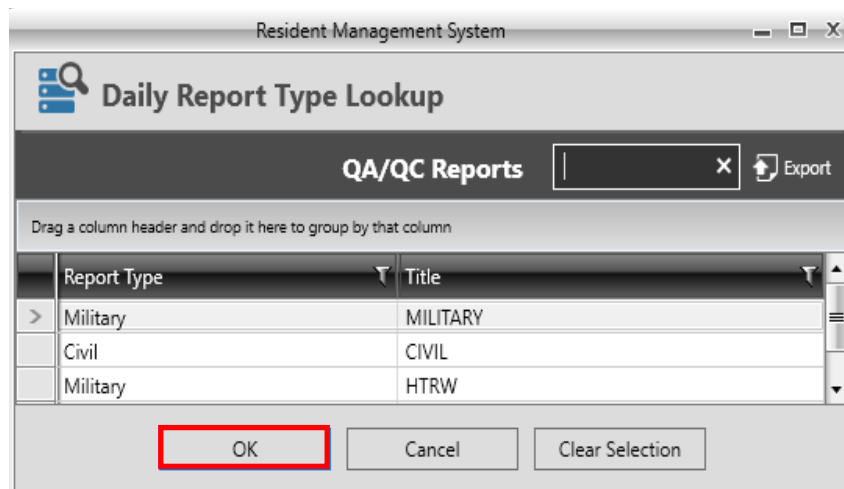
Anticipated adverse weather days per month based on Actual Work Week											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
0	0	0	0	0	0	0	0	0	0	0	0

This tab consists of 2 parts. In the **Quality Assurance** section, identify the QA Team and Report types to be used.

Use this section to identify the QA Team responsible for day-to-day monitoring of the contract, the selection of the Daily Report Type, the measurement units, and if the contract is for a Border Wall project. Click on the data field and select from the list provided.

The Time Extensions Week section replicates the contract's monthly anticipated Adverse Weather Days for use in determining the need for a Weather Mod.

**QA Report Type:** There are 2 primary QA Report types, Military and Civil, with variations on these possible for overseas locations. The QA Narratives that are generated for these reports can be customized resulting in more than one version for each type. Districts define the types/versions it needs to use in **District Library | QA/QC Reports**. Click on the box and select the version applicable to the contract from the **Daily Report Lookup** list. Click on **OK** to continue.



**Project Engineer:** Select the name of the Project Engineer from the *Staff Lookup* list. Click on **OK** to continue.

**Send QA Report To:** Name of the person responsible to review the QA Report. This text field will only appear when the Civil Report type is selected from the QA Report Type drop-down menu. If the Military Report type is selected, the text field will be removed.

**Quality Assurance**

QA Report Type: CIVIL

Send QA Report To:

**On Site COR:** Select the name of the Onsite COR from the *Staff Lookup* list. Click on **OK** to continue.

**Number of QA Shifts:** Select the number of shifts the Contractor will be running from the drop down.

**Chief QA Rep:** Select the name of the Chief QA Rep for each shift from the *Staff Lookup* list. Click on **OK** to continue.

**Alternate QA Rep:** Select the name of the Alternate QA Rep for each shift from the *Staff Lookup* list. Click on **OK** to continue.

**Quality Assurance Units:** Identify the type of measurement units used on the contract drawings from the drop down.

- US Units
- Metric Units
- NONE
- BLUE: DHS FY17-18
- BROWN: FY19

**Border wall group:** If the contract is for the construction of border wall, select the group type from the drop down, otherwise, select NONE.

### 5.7.3.1 Time Extensions due to Adverse Weather

When the contract includes the Special Contract Requirement (SCR) *Time Extensions for Unusually Severe Weather*, it will contain a table of Monthly Anticipated Adverse Weather Delay Workdays consisting of a number associated with each month. These numbers represent the number of days in the month that adverse weather could affect work progress and are used to determine whether the Contractor is due a time extension due to unusually severe weather.

**Contract Expected Work Week:** Check the contract for this SCR, the title of the SCR will include the number of days in the work week for which monthly weather days in the contract are based. It is usually 5. Enter that number here.

**Anticipated Adverse Weather days per month based on Contract Expected Work Week:** Copy the numbers from the SCR into this table.

**Actual Work Week:** If the Contractor is planning a work week which is other than the number of days stated in the SCR's title, enter that number here. Otherwise enter the number from the SCR's title.

**Anticipated adverse weather days per month based on Actual Work Week:** When the Contract Expected and Actual Work Weekdays per week are not the same, RMS will apply the ratio of the 2 durations to adjust the actual days to reflect the Contractor's actual work week. This is the table that will be used to determine whether the Contractor is due a time extension due to unusually severe weather.

## 5.7.4 Submittals/Schedule

**Contract Setup**

Administration/Funding
Payment/Modifications
Quality Assurance
Submittals/Schedule
Dredging
CUI

Add Edit Delete
Submittal Register List
Search X Export

Register	Title
> 01	Main Register

**Submittals**

Compute submittal review dates based on activity schedule

Government Review Period (days)					
GA	FIO	CR	DA	DA/CR	DA/GA
1	2	3	4	5	6

Contractor Resubmittal Period  Days      Variation Review Period

Default Number of Copies					
GA	FIO	CR	DA	DA/CR	DA/GA
6	5	6	6	6	6

Default Government Reviewer: Daniels, Jack

Address Transmittal 4025 Packages To: CENAB-TEST - Baltimore \*\* TEST \*\* Area

**Schedule**

Contractor Schedule Type: Import Early and Late Start/Finish Dates from Contractor's Network Analysis System (NAS)

Disregard NAS imported actual start/finish dates. Use dates entered into QC daily reports instead.

**Weather Modifications**

Specification Section: <ENTER SPEC SECTION HERE>

The **Submittals/Schedule** tab has four sections. These sections are as follows:

**Submittal Register List:** Identifies the Submittal Register(s).

**Submittals:** Summarizes the submittal review periods and allows users to change those periods. Use the **Compute Submittal Need Dates based on Activity Schedule** checkbox to have RMS automatically populate the start dates for submittal items based on the linked activity's scheduled dates.

**Schedule:** Defines the source of Contractor's Activity Schedule.

**Weather Modifications:** Allows a submittal item to be the default item associated with weather modifications. This is not a required entry and may be left blank.

**Contract Setup**

Administration/Funding | Payment/Modifications | Quality Assurance | **Submittals/Schedule** | Dredging | CUI

**Submittal Register List** [Add] [Edit] [Delete] [Search] [Export]

Register	Title
> 01	Main Register

**Submittals**

Compute submittal review dates based on activity schedule

Government Review Period (days)					
GA	FIO	CR	DA	DA/CR	DA/GA
1	2	3	4	5	6

Contractor Resubmittal Period: 7 Days | Variation Review Period: 10

Default Number of Copies					
GA	FIO	CR	DA	DA/CR	DA/GA
6	5	6	6	6	6

Default Government Reviewer: Daniels, Jack  
 Address Transmittal 4025 Packages To: CENAB-TEST - Baltimore \*\* TEST \*\* Area

**Schedule**

Contractor Schedule Type: Import Early and Late Start/Finish Dates from Contractor's Network Analysis System (NAS)

Disregard NAS imported actual start/finish dates. Use dates entered into QC daily reports instead.

**Weather Modifications**

Specification Section: <ENTER SPEC SECTION HERE> [Select a Specification] [Clear Selection]

**Note:** The **Weather Modifications** section tends to be different from District to District. Example: In one District the Adverse Weather Clause may be in section 01 30 00.24 and it may be in a 01 30.00.25 for another District. RMS allows users to customize the Specification Sections for the contract set up.

### 5.7.4.1 Submittal Register List

When the Contractor has only one Submittal Register, it will be displayed as number 01 and named the Main Register. When there is more than one Submittal Register, every additional register must be added to the Register List and named before the Contractor will be able to add its contents to RMS.

Click on [Add](#), RMS will automatically assign it the next number in sequence. Enter a name (40-character limit) for the register, then click on [OK](#), then the [Back](#) button to continue.

### 5.7.4.2 Submittals

Government Review Period (days)					
GA	FIO	CR	DA	DA/CR	DA/GA
30	15	12	4	5	6

Contractor Resubmittal Period: 7 Days      Variation Review Period: 0

Default Number of Copies					
GA	FIO	CR	DA	DA/CR	DA/GA
8	9	10	11	12	13

Default Government Reviewer: <Not Set>  
Address Transmittal 4025 Packages To: <Not Set>

The information entered here is used to calculate the dates in the Submittal Register and establish the number of submittal copies required. Before the Contractor creates Submittal Register items, the default Government Review Period by, Default Number of Copies, and Default Government Reviewer must be entered. These defaults are stamped on any new submittal items added.

**Compute Submittal Need Dates based on Activity Schedule:** Check this box to have RMS automatically calculate the Submittal Register dates using the Scheduled Activity dates. If this box is not checked, the Contractor will have to manually calculate and enter these dates.

**Note:** For this to work as intended, an activity must be associated with every submittal.

**Government Review Period:** Enter the number of days which the contract specifies that the Contractor must allow the Government to review a submittal. See the contract's specification section 01 33 00 SUBMITTAL PROCEDURES, or equivalent, usually 30.

**Contractor Resubmittal Period:** Enter the number of days which the contract specifies that the Contractor must resubmit a returned submittal. See the contract's specification section 01 33 00 SUBMITTAL PROCEDURES, or equivalent, usually 7.

**Variation Review Period:** Enter the number of days to extend a Review Period due to selecting the [Variation](#) checkbox on a Submittal Item.

**Default Number of Copies:** Enter the number of copies which the contract specifies the Contractor must submit. See the contract's specification section 01 33 00 SUBMITTAL PROCEDURES, or equivalent.

**Default Government Reviewer:** This is not a required entry and may be left blank. However, if there is one person responsible for the review of all submittals, click here to select the name from the *Staff Lookup* list.

**Address Transmittal 4025 Packages To:** This is not a required entry and may be left blank. However, to identify where all submittals are to be delivered, click here to select the office from the *Office Lookup* list.

### 5.7.4.3 Schedule Type

**Contractor Schedule Type:** This setting determines how Activity Schedules are entered in RMS.

Manually enter Schedule Start/Finish Dates
Import Early and Late Start/Finish Dates from Contractor's Network Analysis System (NAS)

**Manually enter Schedule Start/Finish Dates:** Use this option for small projects that only require the use of a bar chart schedule.

**Import Early and Late Start/Finish Dates from Contractor's Network Analysis System (NAS):** This option is used for most contracts. This is the selection to make when the contract includes section 01 32 01. 00 10, Project Schedules or equivalent, or requires the use of scheduling software. If this option is selected, the two checkboxes shown below will appear.

**Schedule**

Contractor Schedule Type: Import Early and Late Start/Finish Dates from Contractor's Network Analysis System (NAS) ▼

Disregard NAS imported actual start/finish dates. Use dates entered into QC daily reports instead.

Do not allow Contractor to manually add Features of Work

**Requires the Contractor to use actual start and finish dates from QC Reports on the NAS:** This is a very important decision and has a major impact when selected. When this box is checked, RMS will ignore the Actual Start and Finish Dates in the schedule import file. The Actual Start and Finish Dates can only be entered in the QC Daily reports.

**Recommendation:** When this box is checked, be sure to advise the Contractor of this requirement to ensure coordination between the QC Daily Report author and the scheduler.

**Do not allow Contractor to manually add Features of Work:** This checkbox will restrict Contractor users in the contract from manually adding Features of Work in the *Features of Work* module. If this is checked, then Features of Work can only be added to the contract by using a schedule import file.

### Weather Modification

This area is where a specific submittal item can be chosen as the default specification section for Weather Modifications. This is not a required entry and may be left blank.

## 5.7.5 Dredging

The setting on this tab includes four sections that only come into play on contracts that are specifically identified as Dredging Contracts.

Checking the [Track dredging information in RMS for this contract](#) box will enable the features that are specific to Dredging Contracts.

### 5.7.5.1 Dredging Information System (DIS)

**DIS Job Key:** Information relating to the Corps of Engineers Dredging Information System (DIS) is entered here. Click on the button to select from a list. User must have an account with DIS to add this information. This is not a required entry.

### 5.7.5.2 Dredging Information

**IFB Number:** If known, enter the IFB Number of the contract. This is not a required entry.

**Waterway System:** Click on the field to select a waterway from the District Library. This is not a required entry.

### 5.7.5.3 Dredging Reports

Use this section to identify the types of Daily Quality Control Reports that the Contractor must complete for this contract. In addition to the standard Contractor's Quality Control Report (QCR), there are three types of Dredging Reports. All these reports are defined in [District Library | QA/QC Reports](#).

**Contractor submits standard QC Report:** Check this box to require the Contractor to submit the standard Contractor's Quality Control Report (QCR). This may be in lieu of, or in addition to, any of the Dredge Reports.

**Hopper Dredge Report:** When the Contractor is using a Hopper Dredge, click on this box to select the Hopper Dredge Report type from the [Daily Report Type](#) lookup list that the Contractor must submit. Only Hopper Dredge Report types will be displayed in the list. If the Contractor is not required to submit a Hopper Dredge Report, leave this field blank.

**Track Hopper Activity Detail:** Check this box to add work performed, such as load count information to the Dredging Report.

**Bucket/Pipeline Report:** When the Contractor is using a Bucket/Pipeline Dredge, click on this box to select the Bucket/Pipeline Dredge Report type from the *Daily Report Type* lookup list that the Contractor must submit. Only Bucket/Pipeline Dredge Report types will be displayed in the list. If the Contractor is not required to submit a Bucket/Pipeline Dredge Report, leave this field blank.

**Sidecaster Dredge Report:** When the Contractor is using a Sidecaster Dredge, click on this box to select the Sidecaster Dredge Report type from the *Daily Report Type* lookup list that the Contractor must submit. Only Sidecaster Dredge Report types will be displayed in the list. If the Contractor is not required to submit a Sidecaster Dredge Report, leave this field blank.

## 5.7.6 CUI

The screenshot shows a web application interface for 'Contract Setup'. The 'CUI' tab is highlighted with a red box. Below the tab, there is a question: 'Does the contract identify whether any of the information included in the contract is Controlled Unclassified Information (CUI), in whole or in part (Reference the contract and DoD 5200.48 Part 5.3 a.)?' with radio buttons for 'Yes' and 'No'. Below the question, there is a paragraph of text: 'If you are unsure if the contract contains CUI, in whole or in part, or if you are unsure what CUI marking statement is required for the contract, contact the Contracting Officer, Administrative Contracting Officer, Contracting Officer Representative, and/or Project Manager for CUI guidance specific to the contract.' Another paragraph follows: 'Per DoD 5200.48 Parts 5.3 a. & b. contracts are required to identify whether any of the information in them is CUI and articulate the protective measures and dissemination controls in the contract. If the contract does not provide this information, it is likely not a CUI contract.' A third paragraph states: 'Regardless of whether the contract is CUI or not the following documents shall have "Controlled Unclassified Information" in the header and footer of each page of the report when it is printed: Basic Change Document, Change Request Register with Gov't Estimate, Mod Routing Slip, Price Negotiation Memorandum (PNM), and Prenegotiation Objective Memorandum (POM). If these documents are physically printed or disseminated a CUI cover sheet (available in the RMS Admin reports area) should accompany them.' A fourth paragraph says: 'Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.' The final paragraph provides references: 'CUI references are available in the RMS System Library, CUI Module and on the RMS KM Portal at <https://usace.dps.mil/sites/KMP-EC/SitePages/RMS.aspx>. If you need additional information regarding CUI and this contract refer to the contract team mentioned above and your local Security Office.'

The **CUI** tab is used to address the contract's CUI requirements. Each individual contract's CUI requirements must be identified by the project teams considering the unique project characteristics, project stakeholder resources, and official CUI policy and guidance. To set a contract CUI status select, **Yes** or **No** radio button for the prompt: *Does the contract identify whether any of the information included in the contract is Controlled Unclassified Information (CUI), in whole or in part (Reference the contract and DoD 5200.48 Part 5.3 a.)?*

Upon selecting **Yes**, a notice will be added to the contract's screen header as shown below.



Another prompt will also appear to determine if the contract contains CUI as a **Whole** or **In Part**. If a contract is marked **In Part**, each report will allow users to decide if it requires CUI markings or not. If a contract is marked **Whole**, then all reports will include the CUI markings in the header

and footer areas of the report and users will not be able to change this selection.

Does the contract identify whether any of the information included in the contract is Controlled Unclassified Information (CUI), in whole or in part (Reference the contract and DoD 5200.48 Part 5.3 a.)?  Yes  No

Whole  In Part

Check here to change the default CUI markings

CONTROLLED UNCLASSIFIED INFORMATION

The [Check here to change the default CUI markings](#) checkbox allows the CUI markings to be changed as the contract requirements specify. Upon selecting this checkbox, the textbox next to it will become active and editable. Change the text, if required. The default value for this checkbox is, "CONTROLLED UNCLASSIFIED INFORMATION". When editing the markings, a minimum of three characters is required in the text box.

Check here to change the default CUI markings

CU

CUI marking: **ERROR** A minimum of 3 characters is required.

If you are unsure if the contract contains CUI, in whole or in part, or if you are unsure what CUI marking statement is required for the contract, contact the Contracting Officer, Administrative Contracting Officer, Contracting Officer Representative, and/or Project Manager for CUI guidance specific to the contract.

If the contract does not contain CUI or include any CUI requirements, select the [No](#) radio button. No further selection is required.

**Contract Setup**

Administration/Funding | Payment/Modifications | Quality Assurance | Submittals/Schedule | Dredging | **CUI**

**CUI**

Does the contract identify whether any of the information included in the contract is Controlled Unclassified Information (CUI), in whole or in part (Reference the contract and DoD 5200.48 Part 5.3 a.)?  Yes  No

If you are unsure if the contract contains CUI, in whole or in part, or if you are unsure what CUI marking statement is required for the contract, contact the Contracting Officer, Administrative Contracting Officer, Contracting Officer Representative, and/or Project Manager for CUI guidance specific to the contract.

Per DoD 5200.48 Parts 5.3 a. & b. contracts are required to identify whether any of the information in them is CUI and articulate the protective measures and dissemination controls in the contract. If the contract does not provide this information, it is likely not a CUI contract.

Regardless of whether the contract is CUI or not the following documents shall have "Controlled Unclassified Information" in the header and footer of each page of the report when it is printed: Basic Change Document, Change Request Register with Gov't Estimate, Mod Routing Slip, Price Negotiation Memorandum (PNM), and Prenegotiation Objective Memorandum (POM). If these documents are physically printed or disseminated a CUI cover sheet (available in the RMS Admin reports area) should accompany them.

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

CUI references are available in the RMS System Library, CUI Module and on the RMS KM Portal at <https://usace.dps.mil/sites/KMP-EC/SitePages/RMS.aspx>. If you need additional information regarding CUI and this contract refer to the contract team mentioned above and your local Security Office.

For more information on CUI security markings as it relates to documentation and reports, please refer to [Working with Document Packages](#) and the RMS Government Mode Manual Volume 3, section 12.2 [Generating Reports](#).

## 5.8 P2 Projects

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>		<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>		<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>		
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>		<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>		<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>		
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>		<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>		<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>		
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>		<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>		<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>		
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>		<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>		<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>		

All Corps of Engineers contracts are linked to a P2 project(s). This module can be used to view the information that is stored in P2 relating to the contract and link project(s) when the auto-link did not take place.

In most cases, once a contract is awarded, funded in CEFMS and a Contract Number is assigned, the P2 project(s) associated with the contract will auto-link when the Contract Number is entered in [Administration | Contract Description](#). This link is not needed to use RMS; however, the Project Manager will need to have the link established in order for current construction contract status to be included in the monthly Line-Item Review (LIR).

To manually link P2 projects to the contract, click on [Add](#).

NOTE: P2 Data for this contract has not yet been downloaded.

Add
Delete

### P2 Projects

×
Export

Drag a column header and drop it here to group by that column

Project ID	Project Title	Task Code	Task Name	WBS Title

Task Status	Milestones Events	Cost/Time Growth
-------------	-------------------	------------------

Status <input type="text"/>	Design By <input type="text"/>
Delay Code <input type="text"/>	Contract Type <input type="text"/>
P2 Customer Issues <input type="text"/>	
P2 USACE Issues <input type="text"/>	
P2 Scope of Work <input type="text"/>	



When first accessed, all the projects assigned to the [Contract Office](#) identified in [Administration | Contract Description](#) that have not yet been linked to a construction contract will be listed. To see all contracts in the District, click on the [All Offices](#) box; to also see contracts assigned to the Contract Office's suboffices, click on the [\[Office\] Including Sub-Offices](#) box.

The screenshot shows the 'Select P2 Project' window. At the top, there are three buttons: 'All Offices' (490), 'Support Center Office' (0), and 'Support Center Office Including Sub-Offices' (0). Below these is a table titled 'Support Center Office' with columns: Project ID, Project Title, WBS No., and WBS Title. The table lists various projects, with the row for Project ID 404154 (APG, ARL Logistics Warehouse) highlighted. Below the project list is a table titled 'P2 Tasks' with columns: Task Code, Task Name, and Amount. The row for Task Code C0120 (CONTRACT) has an amount of \$461,647.72, which is circled in red. A red callout box points to this amount with the text: 'This should match the Contract Award amount.'

Project ID	Project Title	WBS No.	WBS Title
403431	Hood JOC Bldg 10037 Barracks Hallways	60000.61000	W9126G-13-D-00040018-B-10037 Rpr Brk Hall
403693	Hood JOC Bldg 6954 Replace HVAC	60000.61000	W9126G-13-D-00040017-B-6954 Rpl HVAC
404002	MYER, Sustainable Dempsey Park	IDIQ.60000.61000	Construction - Contract A
404154	APG, ARL Logistics Warehouse	HL.60000.61000	Construction - Contract A
404404	Hood CAT II Language Facility and 206th MI Latrine Constru	60000.61001	Construction - Contract 206th MI Latrine Construct
404404	Hood CAT II Language Facility and 206th MI Latrine Constru	60000.61000	Construction - Contract CAT II Language Facility
405347	Hood JOC B-2804 Replace Carpet	60000.61000	Construction - Contract A
405596	MYER, Bldg 247 Barracks	60000.61000	W912DY-14-C-0037NA-Renov. Barracks, B24
405713	Hood JOC B-13065 Replace Worn Metal Door Jambs and D	60000.61000	Construction - Contract A
405834	BELVOIR, DLA Replace Ground Fueling Facility	HL.60000.61000	Construction - Contract A
405837	BELVOIR, Visitor Control Center, DLA HQ	HL.60000.61000	W912DY-14-D-0006DA01-DLA VCC
406223	Hood AD008282P B-56156 1st CD Wash Rack Liner, AE Dsn	60000.62000.61000	W9126G-14-D-00480004-1st CD Washrack
406225	Hood AD013651P B-39041 Rpr UPH Dining Fac	60000.61000	Construction
406226	Hood B-334 Auto Sprink System	60000.61000	NA-
406471	Hood HAAF and AAFES Traffic Light Mgt Dsn	60000.61000	Construction - Contract A
406876	B3250	M1.60000.61000	W912DR-15-C-0036NA-B 3245 & 3246

Task Code	Task Name	Amount
C0120	CONTRACT	\$461,647.72

Identifying the correct P2 project is not always straightforward. There may be more than one instance of a Project ID, or Project titles and WBS titles may not be the same as the Contract Title. The simplest approach is asking the PM for the Project ID, find it in the list and select it. Sometimes though there may be more than one contract associated with a single Project ID. Then the best way to ensure the correct project is selected is compare the [Amount](#) with the Contract Award amount. The two amounts should be identical.

If the correct Project ID cannot be found in the list, that usually means that the PM did not add the code to P2 that tells it the project will be linked to RMS. When this occurs, contact the PM to communicate that the RMS-A code in P2 is missing.

The information displayed in the bottom half of the [P2 Project](#) screen reproduces RMS data.

[Task Status](#) tab: This information comes directly from P2.

**Milestone Events** tab: This replicates the System Milestone Events found in [Schedules | Milestone Schedule](#).

**Cost/Time Growth** tab: This is a summary of the contract's financial situation recapping the contract's current value and duration, along with the impact of approved and pending Modifications.

NOTE: P2 Data for this contract was last downloaded on 11/13/24 04:38 PM.

Contract Phase 01 Title: Vehicle Maintenance Complex

**P2 Projects**

Project ID	Project Title	Task Code	Task Name	WBS Title
101741	ACE SMYU963091 VEHICLE MAINTEN	C0120	Contract	DACA81-02-C-0039NA - Vehicle Maintenance - F
101782	ACE SMYU993190 VEHICLE OPERATI	C0120	CONTRACT	DACA81-02-C-0039NA - Vehicle Maintenance - F

**Project 101741 Task C0120** Awarded - RMS Construction Data exported to P2

Task Status | Milestones Events | Cost/Time Growth

Status: Z Facility Accepted by Contracting Officer

Delay Code: D0 No Current Problems (All Phases)

P2 Customer Issues

P2 USACE Issues: PROMIS Comment Number 1 Awaiting BCE guidance on scope and siting issues, since this project must be coordinated with an Army CDIP project. RFP issued 4 May 2000, but Pre-design meeting not yet scheduled.

P2 Scope of Work: Construct new vehicle maintenance facility, composed of a 7,578 SM ground floor and 586 SM mezzanine level. Facility will contain office and storage spaces, maintenance bays, body shop, paint booth, and maintenance shops. This project also includes the demolition

Task % Placement: 100.1 %  
 Contract % Progress SCH: 100.0 %  
 Contract % Progress ACT: 100.0 %  
 Total Earnings To Date: \$ 10,234,232

When the data from P2 has been successfully downloaded to RMS, the **NOTE** at the top of the screen will display the date and time the download was completed. The date and time will update each time a new download is performed. If a download has not been completed for the contract, the **NOTE** will reflect that, as well.

NOTE: P2 Data for this contract has not yet been downloaded.

**P2 Projects**

Project ID	Project Title	Task Code	Task Name
------------	---------------	-----------	-----------

Consult the District's policy on updating the appropriate screens to ensure the data presented in the LIR reports reflect the contract's current status as closely as possible.

## 5.9 Correspondence

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>		<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>		<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>		
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>		<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>		<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>		
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>		<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>		<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>		
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>		<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>		<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>		
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>		<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>		<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>		

RMS provides the Contractor and Government with the ability to create, respond, store and track correspondence between the parties. Correspondence can be signed in RMS and can have attachments.

All letters are serialized. The Government letters to the Contractor are serialized, C-####, for regular correspondence, or RFP-####, for Requests for Proposal. The Contractor can respond from either its Home (H-####) or Site (S-####) office. There is no priority placed on one office over another. When the Contractor sends multiple responses, only the first response to a particular letter from either the H or S office will be accepted, subsequent responses will be ignored.

Correspondence is grouped into 4 subsets:

- **Draft** — Incomplete letters, not yet sent.
- **Sent** — Completed letters, sent to intended recipient.
- **Received** — Letters received from Contractor or another agency.
- **In-House Memos** — Memoranda sent to other offices in the Corps of Engineers.

The list of correspondence corresponding to any of the categories can be seen by simply clicking on the number in the blue field. A filtered list of the category selected will be displayed in the table below.

When first opened, the list that is displayed is **Draft-All**.

Correspondence			
<b>Draft</b>		<b>Sent</b>	
All	56	All	62
Not Completed	45	Answer Required	28
Completed	10	Unresolved Issues	4
Approved	1		
		<b>Received</b>	
		All	169
		Answer Required	107
		Unresolved Issues	1
		<b>In-House Memos</b>	
		All	4
		Answer Required	1
Add Edit Delete <b>Correspondence Draft-All</b> Search Export			
Drag a column header and drop it here to group by that column			
Dated	Letter No.	Brief Summary	Letter Status
11/20/2018	C-0080		Draft Letter Not Complete
11/07/2018	C-0077		Draft Letter Not Complete
10/26/2018	C-0075	Draft Letter Approved	Letter Approved
10/26/2018	C-0074	Draft Letter Complete	Draft Letter Complete
07/18/2018	RFP-0130	Request For Proposal for - test r	Draft Letter Not Complete
06/06/2018	C-0073	testing for editing issues	Draft Letter Complete

## 5.9.1 Create New Correspondence

Click on [Add](#) and select the type of letter from the drop-down box. RMS will automatically insert the next number in the series. This number can be manually overwritten. However, the number manually input must not have been previously used.

The screenshot shows the 'Correspondence' dashboard with four main sections: Draft, Sent, Received, and In-House Memos. Each section has a table of counts for different statuses. Below the dashboard is a toolbar with 'Add', 'Edit', and 'Delete' buttons. The 'Add' button is circled in red, and a dropdown menu is open, listing various letter types: Letter to Contractor, Request for Proposal to Contractor, Letter to Other Agency, Letter from Other Agency, and Government In-House Memo.

Section	Status	Count
Draft	All	56
	Not Completed	45
	Completed	10
	Approved	1
Sent	All	62
	Answer Required	28
	Unresolved Issues	4
Received	All	169
	Answer Required	107
	Unresolved Issues	1
In-House Memos	All	4
	Answer Required	1

Attempts to manually enter a previously used number will generate an error message. Click on [Return to Add View](#) and manually enter another number, or click on [Cancel](#), then [Add](#) again and use the RMS generated number.

**Note:** Most agencies will have procedures for serializing correspondence, and it is therefore unlikely that the Agency Codes that have been established in RMS will match those used by these other agencies. However, to use the RMS correspondence log to track received correspondence, assign a Letter Agency Code to the sender and just note the sender's own serial number in the Letter Summary box for future reference.

The first screenshot shows the 'RMS Add-View' dialog box titled 'Add Correspondence Entry'. It contains a message: 'The following information is required to add a new Correspondence Entry'. Below this is a text input field for 'Letter No. C-' with the value '1234' and a note: 'Enter the number for the new letter - Leading zeros will be automatically added'. At the bottom are 'OK' and 'Cancel' buttons. The 'OK' button is circled in red.

A large red arrow points down to the second screenshot, which shows a 'Data Validation Issues Found' dialog box. It contains an information icon and the title 'Validation Issues Found'. Below is a message: 'Letter No. C-: ERROR Letter number already in use. Enter a unique letter number'. At the bottom is a 'Return to Add View' button, which is circled in red.

## 5.9.2 Letter to Contractor

This correspondence type is serialized with the prefix “C”. Select *Letter to Contractor* from the drop-down list to generate a new letter to the Contractor. Either accept the automatically generated number, or manually enter a number, then click on the **OK** button to proceed to the next step.

After clicking the **OK** button, the next view contains summary information about the letter.

**Note:** Revision History can be found at the bottom of the screen. This will capture actions taken on the correspondence in CM and GM (Submit, Return, Accept). Select a revision entry and click the View button or double click a revision entry to open a read-only view of the correspondence before the listed action was taken.

**Letter Dated:** The current date will automatically populate. However, an alternate date may be entered by clicking on the calendar widget and selecting a date or by manually typing in a date.

**Sent Status:** When a letter is first created, RMS will automatically set the status to *Draft Letter Not Complete*. Update the status using the selections from the drop down as applicable.

Draft Letter Not Complete
Draft Letter Complete
Letter Approved
Letter Sent

**Accept Letter:** This checkbox will become selectable after the *Sent Status* changes to *Letter Sent*. This checkbox is required to be checked to complete the Document Package and allow the contractor to view any added documents.

**Unresolved Issue:** Check this box if the correspondence addresses an issue that requires additional follow up.

**Requires Answer?** Check this box when the letter requires a response from the addressee.

**Letter Summary:** Enter a brief description of the letter's subject.

**Document Packages:** Click on *Add* to create the letter and attach its supporting documents. See section 2.4 on [Document Packages](#) for instructions on its use.

**Select Letters Answered by:** When this letter is in response to a letter from the Contractor or other party, click on this box to select from the *Correspondence Entry Lookup* list of received correspondence. Check the box adjacent to the applicable letter(s), then click on *OK*. The selected correspondence will appear in the box labeled, *Letters Answered by...*

**Create New Letter to Answer:** This button should only be used when logging in a received correspondence. Clicking on this button will initiate a new Contractor letter.

**Select Existing Letter(s) to Answer:** When there is correspondence previously logged in RMS, click on this box to select from the *Correspondence Entry Lookup* list of received correspondence to identify letters that answer the current correspondence. Check the box adjacent to the applicable letter(s), then click on *OK*. The selected correspondence will appear in the box labeled, *Letters Answering...*

**Letters Answered by/Letters Answering:** In addition to manually linking related correspondence using the buttons provided, RMS will automatically list any correspondence that has been previously logged and associated with this letter in these sections.

### 5.9.3 Request for Proposal to Contractor

This correspondence type is serialized with the prefix "RFP". Select *Request for Proposal to Contractor* from the drop-down list to generate a Request for Proposal. Either accept the automatically generated number, or manually enter a number.

**Change Request:** From the *Change Request Lookup* list, select the Change Request for which this Request for Proposal is needed. Click on *OK*.

Then click on the *OK* button to proceed to the next step.

RMS Add View

### Add Correspondence Entry

The following information is required to add a new Correspondence Entry

Letter No. RFP-  Enter the number for the new letter - Leading zeros will be automatically added

Change Request

Resident Management System

### Change Request Lookup

Change Requests

Drag a column header and drop it here to group by that column

Change Request No.	Change Request Title	Reason Code	Status	Reference No.	Change Amount	Change Days	Mod Age
AR	WSOC Ops Room 123 - Window/Door Change	1	5	R00009	\$2,219.00	0	3587
AQ	Window type W3	1	4	Cancelled	\$0.00	0	0
test	Weather Time Extension Oct 18 - Jul 19	E	5	R00082	\$0.00	0	1070
01733	Weather Time Extension May 19 - May 19	E	5	R00082	\$0.00	0	846
01737	Weather Time Extension Mar 20 - Mar 20	E	5	123456	\$0.00	0	816
01740	Weather Time Extension Mar 20 - Mar 20	E	5	P00002	\$0.00	0	811
0572	Weather Time Extension Jun 18 - Jul 18	E	5	R00042	\$0.00	0	1438
12351	Weather Time Extension Jul 20 - Jul 20	E	5	R00077	\$0.00	0	691

### Correspondence - RFP-0152

Letter Dated   Sent Status

Unresolved Issue  Accept Letter

Requires Answer? Answer Due

Change Request  Proposal Amount  Proposal Time (days)

Letter Summary

Letter No. RFP-0152 *GOVERNMENT: Complete a document package for this letter using this document package manager. The document package should include the letter itself and any applicable supporting documents.*

Title of Package	Status	No.

Letters Answered by RFP-0152

Dated	Letter No.	Brief Summary

Letters Answering RFP-0152

Dated	Letter No.	Brief Summary

Revision History

Revision Date	Action	Revised By

The RFP Summary View is like the [Letter to Contractor](#) in section 5.9.2 Summary View, except for the following:

**Requires Answer:** For RFPs, this box will automatically be checked.

**Answer Due:** Whenever an answer is required, an answer due must also be completed. RMS will automatically insert a date that is 14 calendar days from the creation date (not the *Letter Dated* date). Click on the date or the calendar widget to set an alternate date.

**Note:** RFPs typically include a due date in the body of the letter. Take care to match the date in the RFP to the **Answer Due** date entered here.

**Change Request:** The Change Request previously selected is shown. However, it may be changed here by clicking on the blue box and selecting a different Change Request from the *Change Request Lookup* list that is displayed.

**Proposal Amount:** If known at the time the RFP is created, enter the amount of the Contractor's proposal here.

**Proposal Time (days):** Field is not editable.

For other definitions on this view, please see the [correspondence definitions](#).

## 5.9.4 Letter to Other Agency

Select *Letter to Other Agency* from the drop-down list to generate a letter to a recipient other than the Contractor. This correspondence type is serialized with the prefix corresponding to the letter's intended recipient. The Agency Code assigned to potential recipients is created in [District Library | Letter Agency Code](#). Select the agency to which the letter will be sent from the *Letter Agency Codes Lookup* list, then click on **OK**. Either accept the automatically generated number, or manually enter a number.

Agency Code	Agency
> A/E	ARCHITECT/ENGINEER (Default from System)
AFR	AIR FORCE HEADQUARTERS CE (D)
AOC	Architect of the Capitol
B/P	U.S. BORDER PATROL (D)
BCE	BASE CIVIL ENGINEER (D)
CFC	CENTRAL FACILITY CENTER (D)
COE	COE LETTER TO CONTRACTOR (D)
DOD	RSFO Customers
DPW	DIRECTOR OF PUBLIC WORKS (D)
EML	EML Email



Letter No. A/E-  Enter the number for the new letter - Leading zeros will be automatically added

**Correspondence - A/E-0002**

Letter Dated: 9/25/2024 Sent Status: Draft Letter Not Complete

Unresolved Issue  Accept Letter

Requires Answer?

Letter Summary

---

Letter No. A/E-0002    *GOVERNMENT: Complete a document package for this letter using this document package manager. The document package should include the letter itself and any applicable supporting documents.*

Document Packages

Add

Edit

Delete

Title of Package	Status	No.

Select Letter(s) Answered By A/E-0002   
Create New Letter to Answer A/E-0002   
Select Existing Letter(s) to Answer A/E-0002

**Letters Answered by A/E-0002**

Dated	Letter No.	Brief Summary

**Letters Answering A/E-0002**

Dated	Letter No.	Brief Summary

---

**Revision History**

Revision Date	Action	Revised By

The Letter to Other Agency Summary View is like the [Letter to Contractor](#) Summary View in section 5.9.2. For the definitions on this view, please see the [correspondence definitions](#).

### 5.9.5 Letter from Other Agency

This is similar to [Letter to Other Agency](#) (see section 5.9.4), except this selection is used to log in received correspondence. Select [Letter from Other Agency](#) from the drop-down list to log a letter from a party other than the Contractor. This correspondence type is serialized with the prefix corresponding to the letter's sender. The Agency Code assigned to senders is created in [District Library | Letter Agency Code](#). Select the agency from which the letter was received from the [Letter Agency Codes Lookup](#) list, then click on **OK**. Either accept the automatically generated number, or manually enter a number.

The Letter from Other Agency Summary View is like the [Letter to Contractor](#) Summary View in section 5.9.2. For the definitions on this view, please see the [correspondence definitions](#).

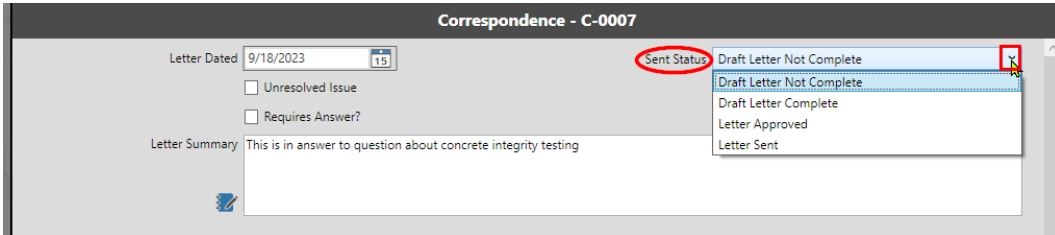
## 5.9.6 Government In-House Memo

Select [Government In-House Memo](#) from the drop-down list to generate a memorandum to an office within the Corps of Engineers. This correspondence type is serialized with the prefix “MEM”. Either accept the automatically generated number or manually enter a number. Then click on the [OK](#) button to proceed to the next step.

The Government In-House Memo Summary View is like the [Letter to Contractor](#) Summary View in section 5.9.2. For the definitions on this view, please see the [correspondence definitions](#).

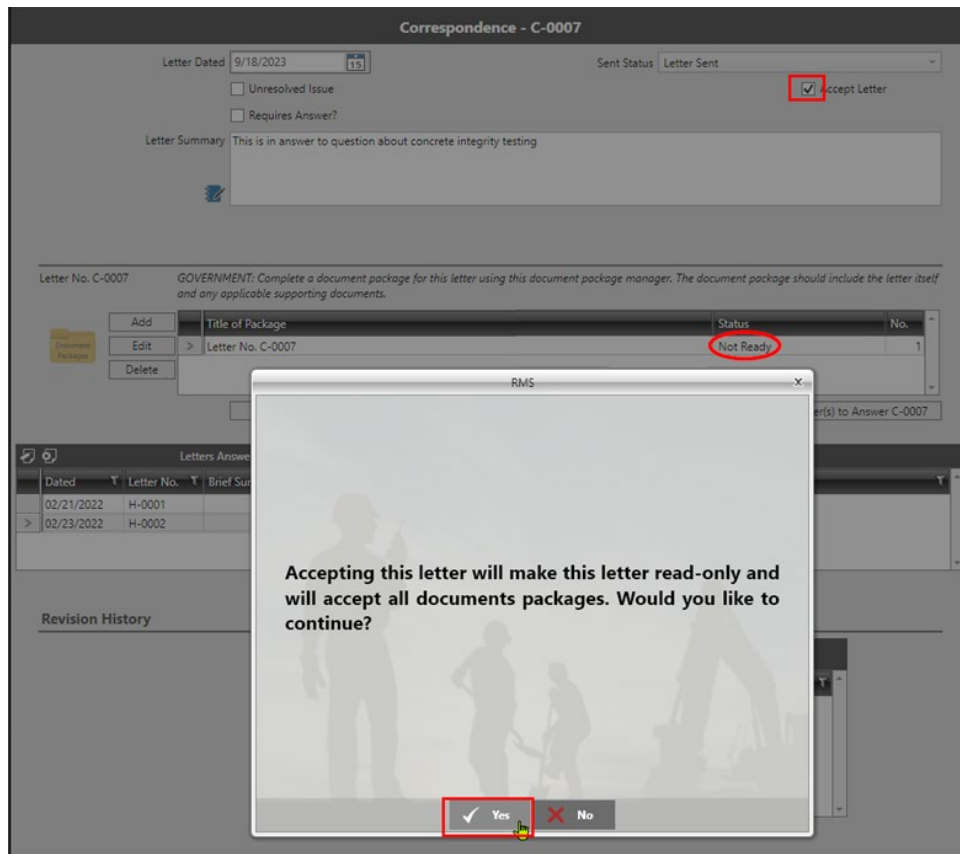
## 5.9.7 Send the Letter

Click on the [Sent Status](#) box to update the status of the correspondence. Use these selections to identify where the correspondence is in the process from creation to sending. When it is ready to send, select [Letter Sent](#).



After the [Sent Status](#) has changed to [Letter Sent](#), the [Accept Letter](#) checkbox can now be checked. Notice that the Document Package [Status](#) remains as [Not Ready](#). Check the [Accept Letter](#) checkbox to complete the Document Package and log the change in the [Revision History](#) table. This action will also trigger the [Correspondence – Letter Accepted](#) by Government notification if enabled by the Contractor.

**Note:** Contractors will not be able to view the Document Package contents until the [Accept Letter](#) checkbox has been checked.



The correspondence is now filed under *Sent* and the Document Package has been set to *Accepted*.

**Correspondence - C-0007**

Letter Dated: 9/18/2023      Sent Status: Letter Sent

Unresolved Issue       Accept Letter

Requires Answer?

Letter Summary: This is in answer to question about concrete integrity testing

---

Letter No. C-0007      GOVERNMENT: Complete a document package for this letter using this document package manager. The document package should include the letter itself and any applicable supporting documents.

Add	Title of Package	Status	No.
Edit	> Letter No. C-0007	Accepted	1
Delete			

**Correspondence**

Draft		Sent		Received		In-House Memos	
All	56	All	64	All	171	All	5
Not Completed	46	Answer Required	29	Answer Required	107	Answer Required	1
Completed	9	Unresolved Issues	5	Unresolved Issues	1		
Approved	1						

**Correspondence Sent-All**      Search      Export

Dated	Letter No.	Brief Summary	Letter Status	Answer Due	Date Answered
09/13/2019	C-123460		Sent	NA	09/13/2019
05/07/2019	RFP-0141	Request For Proposal for - Weather Time Extension Ja...	Sent, Answer Required	05/21/2019	
04/05/2019	RFP-0140	Request For Proposal for - Weather Time Extension Ja...	Sent, Answer Required	04/10/2019	

### 5.9.8 Receiving Correspondence

The Contractor can also create correspondence and submit to the Government for review and/or response. To view received correspondences, click on the *Received* sort tile.

**Correspondence**

Draft		Sent		Received		In-House Memos	
All	0	All	0	All	1	All	0
Not Completed	0	Answer Required	0	Answer Required	1	Answer Required	0
Completed	0	Unresolved Issues	0	Unresolved Issues	0		
Approved	0						

**Correspondence Received-All**      Search      Export

Dated	Letter No.	Brief Summary	Letter Status	Answer Due	Date Answered
> 09/04/2024	H-0001	This letter needs review and response.	Received, Answer Required		

If needed, this view can be filtered further by clicking on *Answer Required* to view received correspondence that requires an answer or *Unresolved Issues* to view received correspondence communicating unresolved issues. Double click on an item or single click on an item and click the

[Edit](#) button to open and view the correspondence.

**Correspondence - H-0001**

Letter Dated: 9/4/2024

Unresolved Issue

Requires Answer?

Letter Summary: This letter needs review and response.

Date Received: Select a date

Accept Letter

Return for Correction

Answer Due: Select a date

Action by: <Not Set>

Letter No. H-0001  
*CONTRACTOR: Complete a document package for this letter and submit it using this document package manager. The document package should include the letter itself and any applicable supporting documents.*

Add	Title of Package	Status	No.
Edit	Letter No. H-0001	In Review	1
Delete			

Select Letter(s) Answered By H-0001    Create New Letter to Answer H-0001    Select Existing Letter(s) to Answer H-0001

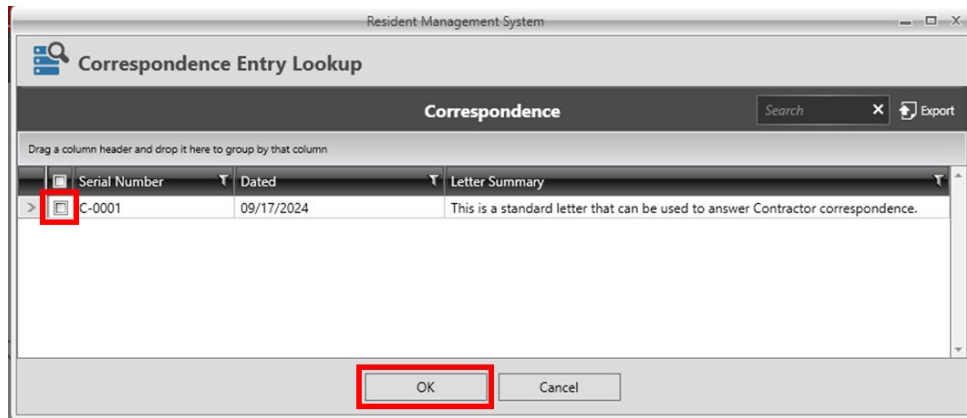
Additional fields will be available at the top of the screen when correspondence is received from the Contractor.

- **Date Received:** Enter a date here to signify when the correspondence was received by the Government.
- **Accept Letter:** Use this checkbox to accept and complete the received correspondence. When this is checked, any associated Document Packages within the correspondence will also be accepted.
- **Return for Correction:** Use this checkbox to return the correspondence and any associated Document Packages back to the Contractor for corrections.
- **Answer Due:** When the **Requires Answer?** checkbox is checked, the Answer Due date must be entered.
- **Requires Answer?:** If checked, this will place the received correspondences in the **Answer Required** sort tile in the previous view. Once a letter has been linked to answer this correspondence, this letter will no longer show in that sort tile. However, the checkbox will remain checked. If the answer was provided in another area of RMS, click the **Create new Letter to Answer H-XXXX** and enter the location of that answer in the **Letter Summary** before completing that letter as per district/office guidelines. This will remove this letter from the **Answer Required** sort tile.
- **Action by:** Assign a user to take action on the correspondence. Click in the blue box to select a user from the **Staff Member** lookup.

Review the received correspondence, and if an answer is required, enter an **Answer Due** date. Use the **Create New Letter to Answer X-####** button to create a new letter to answer the received correspondence.

Use the **Select Existing Letter(s) to Answer X-####** button if a letter that already exists in the contract can be used to respond to the received correspondence. When this option is selected, a lookup of all available letters in the contract will be presented. Make a selection by checking the checkbox for the desired item and click **OK** to confirm.

Further details on the buttons described above can be found in the field descriptions in section [5.9.2 Letter to Contractor](#).



## 5.10 Request for Information

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>	<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>	<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>				
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>	<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>	<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>				
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>	<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>	<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>				
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>	<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>	<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>				
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>	<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>	<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>				

**Request for Information** is a module that allows the Contractor to request clarification and interpretation on contract plans and specifications. This module provides the means to the Contractor to ask these questions and the Government to reply. This module includes attachments via the Document Package Manager as well as the ability to generate the RFI Form.

## 5.10.1 Introduction to RFIs

The screenshot shows the RFI module interface. At the top, there are four filtering tiles: "All RFI's" (339), "RFI's not received" (20), "Outstanding RFI's" (4), and "Complete RFI's" (315). Below these tiles is a toolbar with "Add", "Edit", and "Delete" icons, and a search bar. The main area displays a table of RFI records. The table has columns for "Date Requested", "RFI No.", "RFI Subject", "Date Received", "Date Answered", and "COR/ACO Approved".

Date Requested	RFI No.	RFI Subject	Date Received	Date Answered	COR/ACO Approved
03/25/2021	RFI-0001	Reforestation Trees	04/19/2021	04/19/2021	✓
11/11/2011	RFI-0005	Step footing locations	11/28/2011	04/01/2021	✓
12/05/2011	RFI-0011	Signage for Jogging Trail	12/06/2011	12/08/2011	✓
12/05/2011	RFI-0012	Signage at Golf Cart / Jogging Trail crossing at Temp Road	12/06/2011	12/08/2011	✓
12/12/2011	RFI-0013	Joist size Clarification	12/12/2011	01/10/2012	✓
12/16/2011	RFI-0014	Floor recess for storage system	12/19/2011	01/04/2012	✓
12/16/2011	RFI-0015	Batt insulation clarification	12/19/2011	12/28/2011	✓
12/16/2011	RFI-0016	Clean Agent Fire Suppression System/ Fire Alarm Matrix	12/19/2011	12/27/2011	✓
01/05/2012	RFI-0017	Fencing clarification	01/05/2012	01/10/2012	✓

Below the table, a detailed view of RFI-0001 is shown. The "RFI Subject" is "Reforestation Trees". The "Information Requested" section contains two questions: "1) Location the trees are to be planted?" and "2) What species of 5 trees to be planted?". The "Govt Answer" section contains two responses: "We would like to plant this trees in Nov/Dec 2011. Please provide location and species so this work can be scheduled." and "John Houchins has been contacted and is making the determination on the species and locations which will be provided on a later date (UPDATE: the meeting has been scheduled for January 12th to resolve this RFI)".

Above is a typical **Request for Information** (RFI) module with filtering tiles at the top, giving the user the ability to sort via **All RFI's**, **RFI's not received**, **Outstanding RFI's**, and **Complete RFI's**. Clicking on these tiles will filter the selection view below accordingly.

**Note:** The center title changes to show users which sort filter, if any, is applied, as seen below:

The screenshot shows the RFI module interface with the "Complete RFI's" filter selected. The filtering tiles at the top are: "All RFI's" (366), "RFI's not received" (34), "Outstanding RFI's" (14), and "Complete RFI's" (318). The center title bar now displays "Complete RFI's". The table below shows a filtered view of RFI records.

Date Requested	RFI No.	RFI Subject	Date Received	Date Answered	COR/ACO Approved
03/25/2021	RFI-0001	Reforestation Trees	04/19/2021	04/19/2021	✓
12/05/2011	RFI-0011	Signage for Jogging Trail	12/06/2011	12/08/2011	✓
12/05/2011	RFI-0012	Signage at Golf Cart / Jogging Trail crossing at Temp Road	12/06/2011	12/08/2011	✓
12/12/2011	RFI-0013	Joist size Clarification	12/12/2011	01/10/2012	✓

## 5.10.2 Adding a G RFI

Adding an RFI is something that the Contractor usually completes in Contractor Mode. However, RMS allows the Government to add a G RFI (Government RFI). ~~A G RFI looks and is processed the same way a Government response to a Contractor sent RFI and is described in the next section.~~ If the Government chooses to add a G RFI, the below message will display to verify creation. Click **OK** to proceed.



**Note:** Government users will need to go to the Government Response tab to enter/complete a GRFI.

The G RFI screen will be presented as shown below. If the G RFI is to be viewed by Contractor users in the contract, make sure to check the *Viewable by Contractor* checkbox.

**Request For Information - RFI No. RFI-0022G** RFI Form

---

**Government RFI**

Viewable by Contractor

Prepared:    Completed

Prepared by:   COR / ACO Approved

RFI Subject:

Spec Sections:  Feature of Work:

Information Requested:  Drawings and Details:

Remarks:

RFI-0022G Gov't Only    GOVERNMENT: Complete a document package for Government-only RFI using this document package manager. The document package contents will not be visible to the Contractor.

Title of Package	Status	No.

The fields in this screen can be filled as follows:

1. Enter a *Prepared* date by using the calendar picker.
2. Select the authoring user from the Staff Member lookup to populate the *Prepared by* field.
3. Enter a short description of the G RFI in the *RFI Subject* field.
4. Select a *Feature of Work* from the lookup provided.

5. Enter the specification sections that are associated with the information in the G RFI in the *Spec Sections* field.
6. Enter the associated drawing number(s) and/or detail(s) in the Drawings and Details field.
7. Enter a full description of the information that is being requested in this G RFI in the *Information Requested* field.
8. Enter any remarks related to the G RFI in the *Remarks* field.

Government Document Packages can also be added to a G RFI in the Document Package area at the bottom of the screen. Even though the fields in the G RFI can be viewed by the Contractor if the *Viewable by Contractor* checkbox is checked, any Documents added to the Document Package will only be accessible by Government users in the contract.

Once all information and any supporting documents have been added, the G RFI can be completed by checking the *Completed* checkbox. All fields in this view will become read-only once this box is checked.

**Request For Information - RFI No. RFI-0021G**

Government RFI

**Government RFI** Be aware all information is seen by the contractor once completed.

Viewable by Contractor

Prepared: 10/8/2025

Prepared by: TESTER, TEST

RFI Subject: Test RFI

Spec Sections: 1.X.A

Information Requested: Please provide details on equipment needed to assemble the parts in Drawing 2B.

Remarks: These are remarks related to this G RFI.

Completed  
 COR / ACO Approved

RFI-0021G Gov't Only GOVERNMENT: Complete a document package for Government-only RFI using this document package manager. The document package contents will not be visible to the Contractor.

Add	Title of Package	Status	No.
Edit	> RFI-0021G Gov't Only	Not Ready	1
Delete			

When COR / ACO approval is obtained on the G RFI, the *COR / ACO Approved* checkbox can be checked, as well. Note this action will NOT update the status of the Document Package.

### 5.10.3 Editing a GRFI/ Responding to a Contractor RFI

When opening any RFI, the first view users will see is the *Contractor RFI* tab. In a Contractor-submitted RFI, users will see a Submit entry in the *Revision History* table along with any information the Contractor provided.

### Request For Information - RFI No. RFI-0016 RFI Form

Contractor RFIGovernment Response

---

#### Contractor Request

Requested: 9/25/2024  Completed - Ready for Government

Requester's Name: Contractor name  Required: Select a date

Link to Subcontractor  Potential Cost Impact

Subcontractor: <Not Set>  Potential Schedule Impact

RFI Subject: QT test types Feature of Work: Quality Control

Spec Sections: 01 45 00 Drawings and Details:

Information Requested: KTR asking to know some bit of information regarding the subject

Contractor's Recommendation: If any recommendations from KTR, those go here.

RFI-0016 *CONTRACTOR: Complete a document package for this RFI and submit it using this document package manager. The document package should include the RFI document and any applicable supporting documents.*

Document Packages

Add

View

Delete

Title of Package	Status	No.
RFI-0016	In Review	1

---

#### Revision History

ViewRevision History

Revision Date	Action	Revised By
9/25/2024 10:01:21 PM UT	Submit	gsm@kent.edu

Below, is the typical edit screen for a Government Response on an RFI. whether it be a GRFI or a contractor submitted RFI.

**Request For Information - RFI No. RFI-0002G** RFI Form

Contractor RFI | Government Response

**Government Response** Be aware all information is seen by the contractor once completed.

Return to Contractor for Corrections

Date Received  15  6  Answer Completed 7

Received by <Not Set>  Modification Required 8  COR / ACO Approved

Answer Prepared By <Not Set> 3

Govt Response  4

RFI Secondary Reviewers

Staff Name  4

Secondary Respondent <Not Set> 4 Secondary Response Due  15 Secondary Response Completed  15

Secondary Respondent Response  4

RFI-0002G Response *Shared: Prepare a document package for this RFI response and complete it using this document package manager. The document package should include the RFI response and any applicable supporting documents.*

Document Packages

Add	Edit	Delete	Title of Package	Status	No.
			5		

RFI-0002G Gov't Only *GOVERNMENT: Complete a document package for Government-only RFI Response using this document package manager. The document package contents will not be visible to the Contractor.*

Document Packages

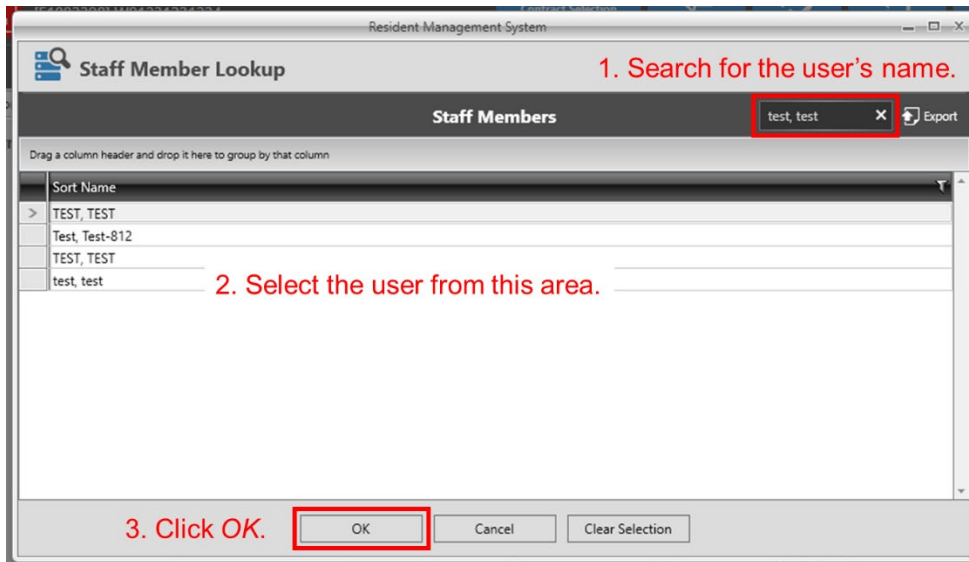
Add	Edit	Delete	Title of Package	Status	No.
			5		

**Note:** The warning message at the top right of the view applies to everything EXCEPT the Secondary Reviewer and Government Document Package sections.

Steps to complete this module include:

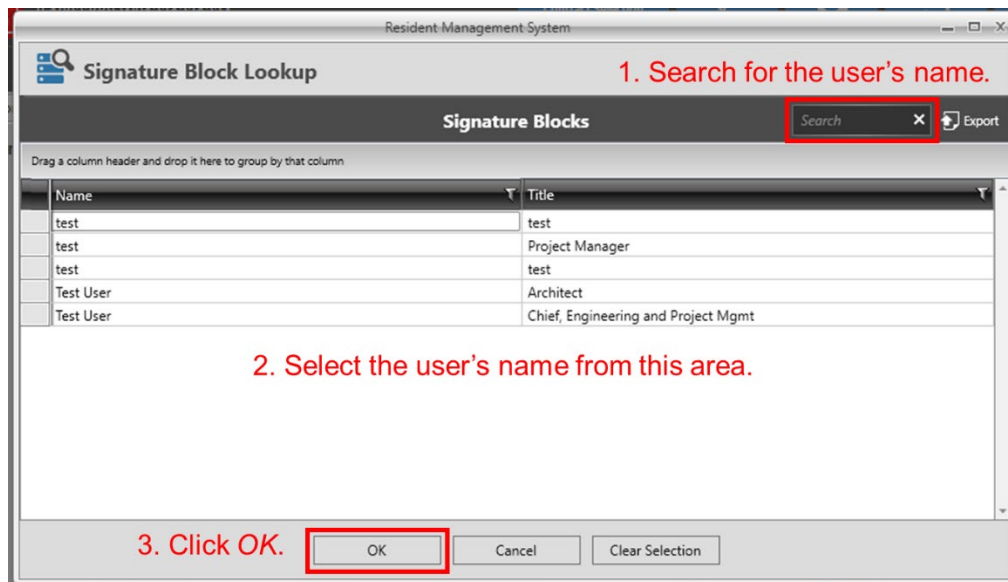
1. Set a *Date Received*. When setting or editing this date, the logged in user will automatically be populated in the *Received by* field. This can be changed in the next step, if needed.
2. Set a *Received by*.

- a) Click on the blue box to the right of the *Received by* to get a list of available staff to choose from:



3. Set the *Answer Prepared By*

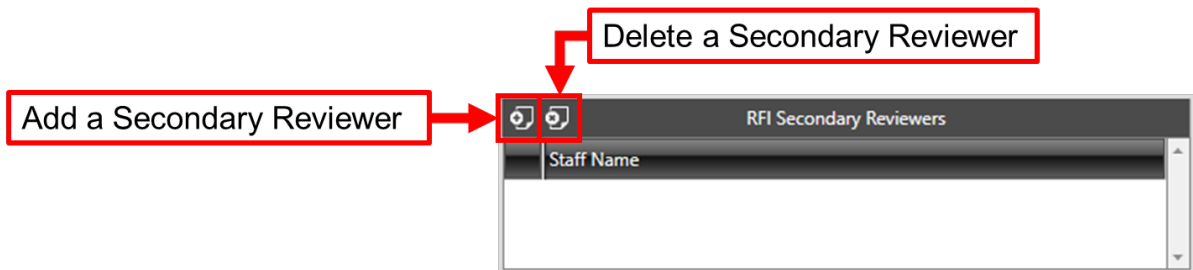
Click on the blue box to the right of *Answer Prepared By* to bring up the *Signature Block Lookup* table



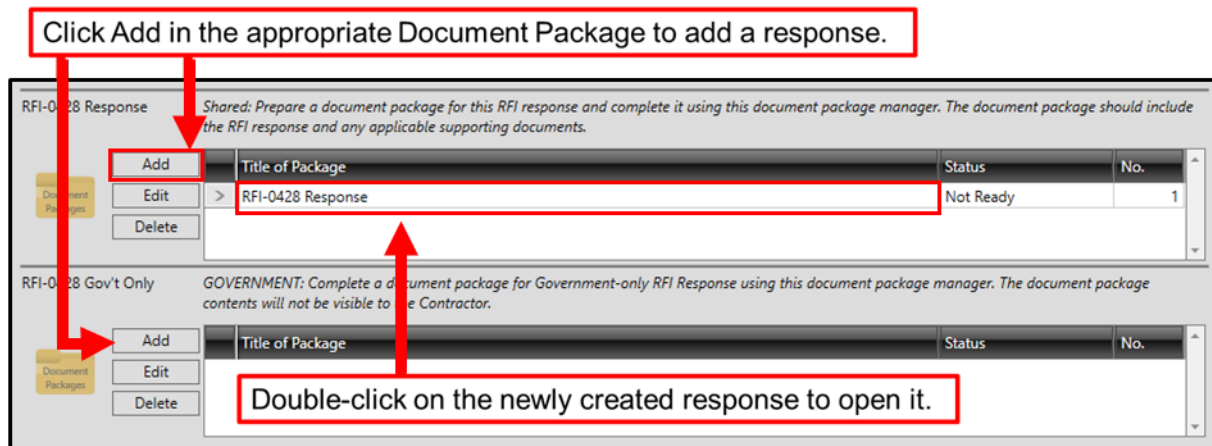
Who is listed as the *Answer Prepared By* name varies by District. Normally, the person who has the contractual legal power, i.e., the COR, ACO, or KO, should be the name listed in the *Answer Prepared By* section and the person signing the documents. However, sometimes information is entered by other people, therefore users need to follow the District's Policy for who is to prepare the answer and sign the document for an RFI.

4. Fill out the *Government Response* and any Secondary Reviewer Remarks. While the government remarks are viewable by the contractor when the RFI is marked complete, the Secondary Reviewer Remarks are only visible to the government.

To add a Secondary Reviewer, click on the plus sign in the RFI Secondary Reviewers section, this will bring up a Staff Member lookup.



5. If any documents need to be added to the RFI, those can be added in the Document Packages at the bottom of the RFI screen.
  - a. The top Document Package is visible to both Government and Contractors, whereas the bottom Document Package is only visible by the Government. Add any documents that will be shared with the Contractor to the shared, or top, Document Package. If documents are for Government use only, and not to be seen by the Contractor, add those to the Government, or bottom, Document Package.



**Note:** The *Primary* column within the Document Package is used to signify the most current version of auto-generated documents in RMS. If needed, the selection can be edited for the following documents:

- *RFIs*
- *ENG 93*
- *QA Daily Report*

All Attachments					
Primary	Date of the Docum	Document Title	Contractor Signature Status	Government Signature Status	Status
<input checked="" type="checkbox"/>	5/28/2019	RFI-0006 Response - RFI_Form.PDF	Not Signed	Not Signed	Document not Ready
<input type="checkbox"/>	5/28/2019	RFI-0006 Response - RFI_Form.PDF	Not Signed	Not Signed	Document not Ready

6. Enter an *Answered* date.
7. Check the *Answer Completed* checkbox.

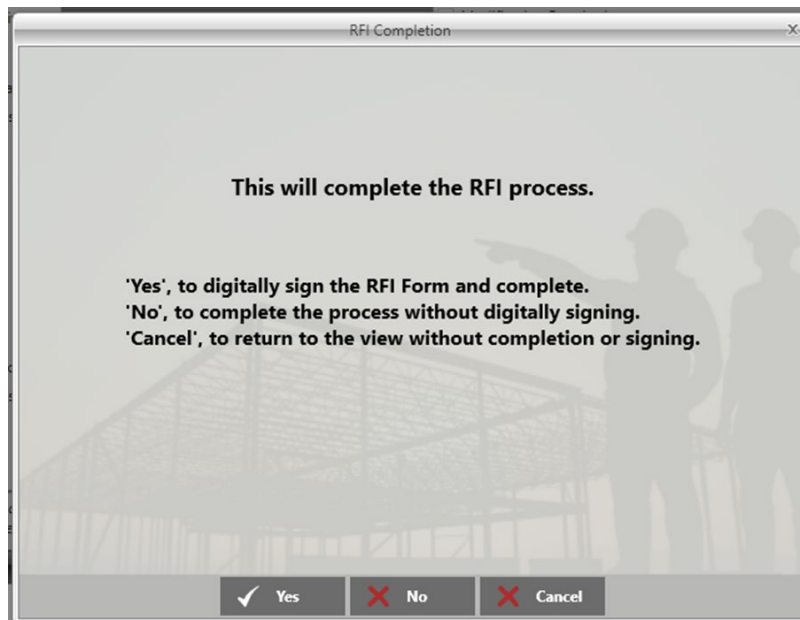
**Note:** This cannot be checked until an *Answered* date has been entered.

8. Check the *COR / ACO Approved* box and complete the RFI process.

**Note:** This option cannot be checked complete until the *Answer Completed* box is checked.

Once the *COR / ACO Approved* checkbox is checked, the prompt shown below will appear to complete the RFI process with a digital signature (*Yes*) or without (*No*).

Clicking *Yes* will initiate the signature process. Once signing is complete, all associated Document Packages will be completed and/or accepted. Clicking *No* will automatically accept and/or complete all associated Document Packages for the RFI without adding a digital signature.



It is important to understand that until step 8 is completed, the RFI will not be visible to the Contractor.

Optional RFI settings include:

1. *Modification Required*
  - a. If this option is checked, a new row will appear for the *Change Request No.* This field will include a lookup selection view that pulls from the *Finances > Contract Changes* module.

Request For Information - RFI No. RFI-0009

Contractor RFI | Government Response

Government Response Be aware all information is seen by the contractor once completed.

Return to Contractor for Corrections

Date Received: Select a date [15] | Answered: Select a date [15]

Received by: TEST, TEST  Modification Required

Change Request No: <Not Set>

Answer Prepared By: <Not Set>

Resident Management System

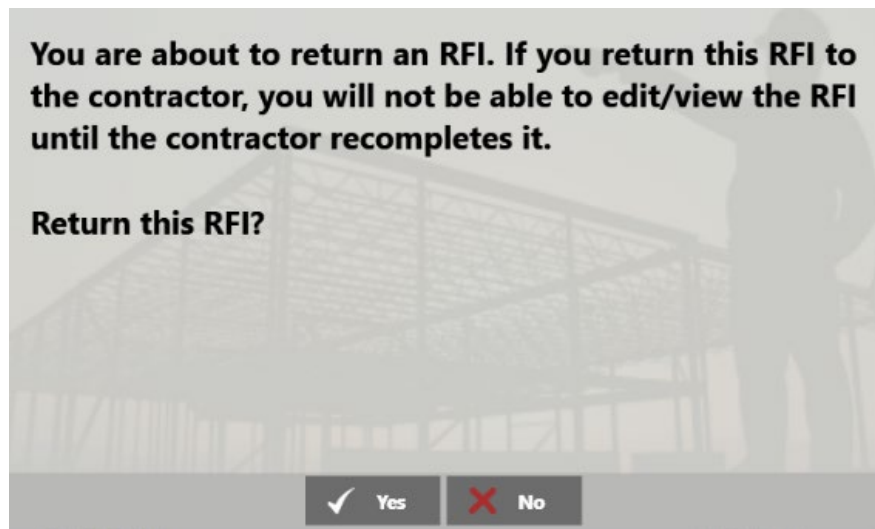
**Change Request Lookup**

Change Requests

Drag a column header and drop it here to group by that column

Change Request Code	Change Request Title	Reason Code	Status	Reference No	Change Amount	Change Days	Mod Age	Total costs:	Convert to single part
> 00001-1	test	5	5	R00002	\$0.00	0	564	\$0.00	<input type="checkbox"/>
00001-2	test	1	4		\$0.00	0	0	\$0.00	<input type="checkbox"/>
00001-3	test	6	4		\$0.00	0	0	\$0.00	<input type="checkbox"/>
00001-4	test	5	4		\$0.00	0	0	\$0.00	<input type="checkbox"/>
00001-5	test	1	4		\$0.00	0	0	\$0.00	<input type="checkbox"/>
00002	a	V	5	R00002	\$0.00	0	0	\$0.00	<input type="checkbox"/>

2. [Return to Contractor for Corrections](#) button. This action will also return all associated Document Packages.



**Note:** Government users cannot see draft RFIs. When an RFI is returned to the Contractor for corrections, it moves back into a draft state.

When completed, the **Government Response** tab should look something like this:

**Request For Information - RFI No. RFI-0013** RFI Form

Contractor RFI | **Government Response**

**Government Response** Be aware all information is seen by the contractor once completed.

[Return to Contractor for Corrections](#)

Date Received: 8/6/2024 | Answered: 8/6/2024 |  Answer Completed

Received by: [Redacted] |  Modification Required |  COR / ACO Approved

Change Request No: 00006 - Change XX1

Answer Prepared By: Test User - Chief, Engineering and Project Mgmt

Govt Response: Additional materials needed. Mod will be required.

**RFI Secondary Reviewers**

Staff Name: TEST TEST

Secondary Respondent: TEST, TEST | Secondary Response Due: 9/3/2024 | Secondary Response Completed: 9/3/2024

Secondary Respondent Response: Secondary Reviewer concurs.

---

**RFI-0013 Response** *Shared: Prepare a document package for this RFI response and complete it using this document package manager. The document package should include the RFI response and any applicable supporting documents.*

[Add](#) [Edit](#) [Delete](#)

Title of Package	Status	No.
RFI-0013 Response	Accepted	1

---

**RFI-0013 Gov't Only** *GOVERNMENT: Complete a document package for Government-only RFI Response using this document package manager. The document package contents will not be visible to the Contractor.*

[Add](#) [Edit](#) [Delete](#)

Title of Package	Status	No.
------------------	--------	-----

The generated RFI Form will be placed into a Shared Document Package (see [RFI-0013 Response](#) in the figure above in the Shared Package section). The **RFI Form** button on the top right corner of the screen can be clicked to view the RFI Form at any time. However, after the RFI has been completed, the form should be viewed from the Document Package in the Shared Document Package area.

**Note:** In the **Contract Reports** module, RFIs can be generated in mass instead of one by one in the **Request for Information** module.

Revision History for the RFI can be viewed in the **Contractor RFI** tab as shown in the example below.

**Request For Information - RFI No. RFI-0010**

**Contractor RFI** | Government Response

**Contractor Request**

Requested: 8/12/2024  Completed - Ready for Government

Requester's Name: Test Requester Required: Select a date

Link to Subcontractor  Potential Cost Impact

Subcontractor: <Not Set>  Potential Schedule Impact

RFI Subject: Request Subject Feature of Work: <Not Set>

Spec Sections: Drawings and Details: Drawing XX

Information Requested: Requested information

Contractor's Recommendation: Recommended information

RFI-0010 **CONTRACTOR:** Complete a document package for this RFI and submit it using this document package manager. The document package should include the RFI document and any applicable supporting documents.

Title of Package	Status	No.
RFI-0010	Accepted	1

**Revision History**

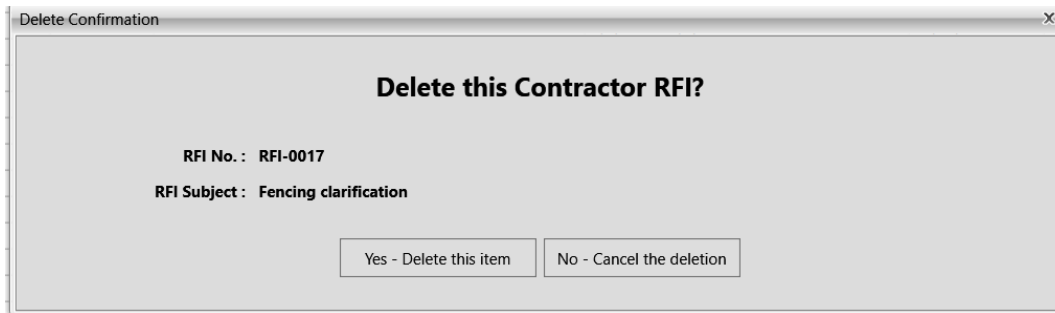
Revision Date	Action	Revised By
8/12/2024 9:44:56 PM UTC	Accept	
8/12/2024 9:43:38 PM UTC	Submit	
8/12/2024 9:42:41 PM UTC	Return	

Click the **Back** button to return to the RFI selection screen.

#### 5.10.4 Deleting an RFI

Requested	RFI No.	RFI Subject	Date Requested and Date Received	Date Answered	COR/ACO Approved
12/16/2011	RFI-0015	Batt insulation clarification	12/16/2011 - 12/19/2011	12/28/2011	<input checked="" type="checkbox"/>
12/16/2011	RFI-0016	Clean Agent Fire Suppression System/ Fire Alarm Matrix	12/16/2011 - 12/19/2011	12/27/2011	<input checked="" type="checkbox"/>
> 01/05/2012	RFI-0017	Fencing clarification	1/5/2012 - 1/5/2012	01/10/2012	<input checked="" type="checkbox"/>
01/05/2012	RFI-0018	Weather stripping & sealant at access flooring	1/5/2012 - 1/5/2012	01/19/2012	<input checked="" type="checkbox"/>
01/05/2012	RFI-0019	Fire line clarification	1/5/2012 - 1/5/2012	01/10/2012	<input checked="" type="checkbox"/>

First, select the RFI to delete. Then click on the **Delete** button.



Clicking **Yes – Delete this item** will result in a deletion of this RFI (not reversible). Click **No** to cancel the deletion.

**Note:** RFI numbers cannot be reused, as adding an RFI continues counting where last left off.

## 5.11 Contract User Entries / Special Data

The Contract User Defined Entries and Office User Defined Entries assist Districts with specialized reporting for contracts in the District. In this module are two tabs: **Contract User Entries** and **Special Purpose Data**.

Contract User Entries		Special Purpose Data
<b>Contract User Entries</b>		
		Search X Export
Drag a column header and drop it here to group by that column		
Description of Macro	Data for UDF Contract	
> COR's Email Address	some.email@usace.army.mil	
Resident Engineer's Name	RE's Name	
Project Manager's Name	PM's Name	
Office Engineer's Name	OE's Name	
COR's Telephone	888-456-7890	
Office Engineer's Telephone	888-123-4567	

Contract User Entries		Special Purpose Data
<p>The following grid down below contains special purpose data to be used throughout the RMS 3 app for calculations, reports, views etc. This view is only displayed for contracts with special projects that require some sort of new or special field to be added.</p>		
<b>Special Purpose Data</b>		
		Search X Export
Drag a column header and drop it here to group by that column		
Special Data Description	Data for UDF Contract	
> SP_BORDERWALL_SCHED_START_TIME	0600	
SP_BORDERWALL_SCHED_END_TIME	1600	

**Contract User Entries:** The Contract User Entries are the entries that are used to fill out some Word Templates used in the District. For information on the Word Templates, please see the section on [Word Templates](#).

**Special Purpose Data:** The Special Purpose Data tab is for Special Data Entries to be used throughout the contract for calculations, reports, views etc. This view is only displayed for contracts with special projects that require some sort of new or special field to be added.

USACE users will use the selection view to enter data directly into these custom fields.

To change/add Contract User Defined Entries, District Administrators need to go out of the contract to the **District Library** menu in the **User Defined Macros** module:

District Library Menu			
<h2>T2 Baltimore Test District Library</h2> <p>The District Library contains the modules maintained by each USACE district. These modules (libraries) include district-driven selections setup by district administrators in order to provide uniformity throughout all District Offices. For changes or information regarding the District Library, contact your RMS District Administrator.</p>			
<b>Contract Groups</b> <i>Group titles with group types at a District level.</i>	<b>Custom Reports</b> <i>Custom Reports for the District.</i>	<b>Word Templates</b> <i>A collection of Word templates at the District level.</i>	<b>User Defined Macros</b> <i>Contract and Office level User Defined Entries for macros.</i>
<b>Letter Agency Codes</b> <i>Agencies and their respective Agency Codes.</i>	<b>Standard Text</b> <i>BCD, SF30, ENG93, and RFI Types and their descriptions.</i>	<b>QA/QC Reports</b> <i>Report types and their titles.</i>	<b>Features of Work</b> <i>A District level collection of Features of Work.</i>
<b>Three Phase Inspections</b> <i>Number of Preparatory, Initial, and Followup Checks for Features of Work.</i>	<b>Submittal Types</b> <i>District level collection of Submittal types, their abbreviations, and full titles.</i>	<b>District Milestones</b> <i>Event Phases, Milestone Events, and District level settings.</i>	<b>Claim/Dispute Events</b> <i>District level collection of Events for Contractor Claims and Disputes.</i>
<b>Contractor Trades</b> <i>A District level collection of Contractor Trades.</i>	<b>Labor Classifications</b> <i>Labor Classifications and their Occupational Codes.</i>	<b>Work Categories</b> <i>A District level collection of Work Category Codes.</i>	<b>Construction S Curves</b> <i>S Curves, their remarks, and Hannum Curve.</i>
<b>Dredging Waterways</b> <i>Waterway systems and Dredging features.</i>	<b>Query Definitions</b> <i>Queries developed at a District level.</i>	<b>Document Signature Positions</b> <i>Control exact locations of digital signatures.</i>	<b>Contract Locations</b> <i>List of contract locations in district.</i>

Here, in the [User Defined Macros](#) module, macros can be added, edited, and deleted.

**Note:** The two sorting tiles at the top (Contract User Defined Entries and Office User Defined Entries). Clicking on these respective tiles will change the list of entries in the selection view.

User Defined Macros	
Contract User Defined Entries 3	Office User Defined Entries 3
Add Edit Delete <b>Office User Defined Entries</b> Search X Export	
Drag a column header and drop it here to group by that column	
UDF Name	Description
> UD_KTR_SUPER	Superintendent
UD_LINK_P2	p2
UD_PARENT_ID	Parent Office ID

In the above picture, for example, the [Office User Defined Entries](#) tile was clicked, and the selection view was changed to reflect this selection.

**Note:** UDF stands for User Defined. This is a name that can be referenced in a Custom Report. If creating a Custom Report to pull the Required CCD field from contracts, the UD\_REQ\_COMP\_DATE\_SCH UDF (User Defined Field) name can be referenced in a Custom Report.

## 5.12 Prime Contractor

Add Prime Contractor from Entered Info **Prime Contractor**

Prime Contractor Info Contractor Staff

**Prime Contractor Information**

RMS 3 Prime Contractor **E1000133 - Michael's Test Prime Contractor** Prevent Contractor Mode Access

UEI Number 231423143333 Copy UEI and Contractor Information Cage Code XXX

Responsibility Code PRIM NAICS Code 236220

Contractor Full Name Alan Smallwood Excav Contractor Short Name XYZ GENERAL

Send Mail To Contractor Home Office DUNS No. 162618219

Payee Office

---

**Home Office Address**

Street 142 Hollow Lane City Butler State PA Zip Code 16002

County Sample Country USA

Work Phone 198-765-4321 Fax 123-123-1234

**Site Office Address**

Street 123 Smiht Ln. City Butlerville State PA Zip Code 16002

County Sample Country USA

Work Phone 789-123-1234 Fax 432-123-7895



**Staff Information**

Project Manager JOHN P. MANAGER Work E-Mail address@email.com

Work Phone Mobile 102-456-7891 Other Phone

Superintendent BOB SUPERINTENDENT Work E-Mail test@email.com

Work Phone 123-876-5309 Mobile Other Phone

Assistant Superintendent

QC Manager JOE QC MANAGER Asst QC Manager

Site Safety/Health Officer Alternate SSHO

**Contractor Representative to Review Performance Evaluation (CPAR)**

Name Jane Smith Work Email jane@email.com

---

**Bonding Company / Work Days**

Bond Number 123456

Bonding Company B. BONDS

Address 1 123 Laine St.

Address 2

Work Phone 123-359-1345

Fax

**Work Days**

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday



Contractor is a small business  
 Contract requires a small business plan      Small business plan goal  %  
 Contract Administered by SBA

SBA Office Name       SBA Office Address   
 SBA Administrator Name       SBA Administrator Title

Insurance Required?  
 Payroll Required?

Payrolls ending day of week

Use Last Day as Payroll end override?

The Prime Contractor Screen is important to the contract because this is how USACE Representatives will link a Prime Contractor to the contract, allowing the Contractor to use RMS Contractor Mode to access the contract. One of the very first things, after creating the contract, that needs to be done to complete the setup of the contract is to provide access to the Contractor. This screen allows the USACE Representatives to:

- See all the Contractor Staff
- Prevent Contractor access if needed
- View the Prime Contractor information
- Deal with whether insurance or payroll is required
- Set up if this Contractor is a small business.

The first Contractor to get assigned to the Contractor Staff needs to be an Administrator on the Contractor side to allow adding of additional Contractors to the contract, as well as setting up the User Roles for the additional Contractors. It is important to remember that the first Contractor Staff assigned needs to be an Administrator.

**Note:** Once the staff is assigned, if the same Prime Contractor is assigned to another contract, the staff assignments still apply. Therefore, a Prime (and the associated Contractor Staff) can be assigned to many different contracts. Adding staff only needs to happen once to the Prime Contractor Staff list.

**Note:** Prime Contractors are set up in the [District Office > Prime Contractors](#) module. To add/edit/delete Prime Contractors, USACE Representatives need the District Administrator role. Below is a screen capture of the [District Office > Prime Contractors](#) module. If the Prime Contractor does not show up in the list, a District Administrator will need to add the Prime Contractor.

Prime Contractor ID	Contractor Name	DUNS4	Cage Code	City	State
E1000014	Alan Smallwood Excav	162618219		Butler	Pennsylvania
E1000015	Alvarez Contractors,	086681178		Spring Dale	WV
E1000016	Amatea/Grimberg JV	832154194		Leesburg	VA
E1000017	American Infrastruct	031001857		Fallston	MD
E1000018	American Solar	073067931		Annandale	VA
E1000067	Angler Environmental	944292247		Manassas	VA
E1000165	Anon Contracting	01-048-37			

**Note:** Prime Contractors can be added to the list of Prime Contractors via the [Add Prime Contractor from Entered Info](#) button (see picture below). This saves time by not needing to go to District Office > Prime Contractors and adding the Prime Contractor there.

### 5.12.1 Adding a Prime Contractor from the Administration tab

On a new contract, the [RMS Prime Contractor](#) field will not be set and looks similar to the image below:

Click the blue box that says [<Not Set>](#) to add a Prime Contractor to the contract.

Prime Contractor ID	Contractor Name	UEI No	City	Cage Code
E1000011	AISOW Technologies	86753099999	Rockville, MD	
E1000114	Banneker	84719874128	Laurel, MD	
E1000171	Bubbly Aeronautical Technologies	82828282828	Winchestersonfieldville, IOWA	55555
E1000014	Alan Smallwood Excav	23142314333	Butler, Pennsylvania	
E1000024	BIS	12345678999	Alexandria, VA	cxvbc
E1000130	The Ranger Group2	12344455667		
E1000012	Akima	12342314333	Charlotte, NC	

Select the Prime Contractor and then click the [OK](#) button.

**Note:** The search bar on the top right allows searching for specific Prime Contractors if needed.

Once this is done, click the [Copy UEI and Contractor Information](#).

The screenshot shows the 'Prime Contractor' form with a 'Prime Contractor Lookup' dialog box. The dialog box has a search box containing 'alan' and a table of results. The 'OK' button is highlighted with a red box.

Prime Contractor ID	Contractor Name	UEI No	City
> E1000014	Alan Smallwood Excavating	23142314333	Butler

**Note:** The search box was used to find Alan Smallwood Excavating.

The screenshot shows the 'Prime Contractor' form with the following information entered:

**Prime Contractor Information**

- RMS 3 Prime Contractor: E1000133 - Michael's Test Prime Contractor
- UEI Number: 23142314333
- Responsibility Code: PRIM
- Contractor Full Name: Alan Smallwood Excav
- Send Mail To: Contractor Home Office
- Payee Office: [Redacted]
- Prevent Contractor Mode Access: [Checked]
- Cage Code: XXX
- NAICS Code: 236220
- Contractor Short Name: XYZ GENERAL
- DUNS No.: 162618219

**Home Office Address**

- Street: 142 Hollow Lane
- City: Butler
- County: Sample
- Work Phone: 198-765-4321
- State: PA
- Zip Code: 16002
- Country: USA
- Fax: 123-123-1234

Once this is done, then all information entered in the [District Office > Prime Contractors](#) screen will be placed into the contract (shown below):

**Note:** The Payee Office comes from CEFMS and requires the Contractor to keep the SAM.gov addresses up to date.

**Responsibility Code:** This is always set to PRIM by the Government. Since this is the **Prime Contractor** module, it is always PRIM and always read only.

**Contractor Short Name:** The Government will enter an abbreviated name for the Prime Contractor to be used in reports with limited space. This field is limited to 20 characters.

**Send Mail To:** Select either Contractor Home Office or Contractor Site Office from the drop-down. This is the destination for all correspondence from the Government's Field Office to the Prime Contractor.

**Home Office Address:** Enter the Prime Contractor's Home Office address information.

**Site Office Address:** Enter the Prime Contractor's Site Office address information.

**Staff Information:** Enter the names and contact information.

**Contractor Representative to Review Performance Evaluation (CPAR):** Enter the name and email of the person responsible for reviewing and responding to the Government's Performance Evaluation of the Contractor. This information will be used to set up Contractor access to the Electronic Performance Evaluation System (CPARS). This is the person who will be notified that the Government has completed its performance evaluation. A reply can be added within 30 days from the notification date. This time frame is fixed and cannot be extended.

**Bonding Company:** Enter information on the company providing the bonds for the contract.

**Workdays:** Place a checkmark on the days worked in the Contractor's normal work week.

**Insurance Required?:** Check this box to track insurance validity dates if required.

**Payroll Required?:** Check this box to track submitted payrolls if required.

**Payrolls ending day of week:** Select the day of the week marking the end of the Contractor's typical payroll work week.

## 5.12.2 Adding Contractor Staff

On a new contract, the **Contractor Staff** screen will look similar to the image below:

Name	Account ID (work email)	Admin	Linked	Last Logged In	Inactive	Deleted
[Redacted]	[Redacted].com	Yes	Yes	12/6/2021 11:1	<input type="checkbox"/>	<input type="checkbox"/>
[Redacted]	[Redacted]@mil	Yes	Yes		<input type="checkbox"/>	<input type="checkbox"/>
[Redacted]	[Redacted]@mil	Yes	Yes		<input type="checkbox"/>	<input type="checkbox"/>

Remember, the first Contractor Staff to be added to the Prime needs to be set as an administrator so this user can add additional Contractor Staff to the project.

Clicking the **Add** button shows a screen similar to the one below:

**RMS Add View**

**Add Contractor Staff Member**

The following information is required to add a new Contractor Staff Member

To add a staff member, enter an email address

Account ID (work email)

OK Cancel

**Note:** Account ID entered here needs to match the email account that the Contractor used to register in RMS exactly. It is common for USACE Representatives to assume that Contractors will use an email address that is used frequently in communication to register an account in RMS. However, Contractors can register any email address as an account in RMS.

For instructional purposes, assume that the Contractor registered [my@email.com](mailto:my@email.com). The Account ID would need to be added as shown below:

Next, fill in the first name, last name, and whether or not to give administrator rights.

**Note:** The first Contractor added MUST have the *Has Administrator Rights* box checked. From this screen, hit the *Back* button to go back to the Contractor Staff screen.

Name	Account ID (work email)	Admin	Linked	Last Logged In	Inactive	Deleted
Last, First	my@email.com	Yes	No		<input type="checkbox"/>	<input type="checkbox"/>

Notice that user above has been added. However, the *Linked* column is set to *No*. As soon as this user attempts to log in, RMS will link this staff entry to the user's login account. Once RMS the accounts have been logged in, the *Linked* column will change to *Yes*. The user will then be able to see the contract in Prime Contractor Selection view.

**Note:** Contractors may need to hit the *Update* button when logging in for the first time to get an updated Prime Contractor list.

If the *Linked* column stays *No*, then the following may be true.

1. The user has not attempted to log in,
2. The login email address and the email address used to create the Contractor staff account are different.

### 5.12.3 Setting Contractor Staff Inactive

Usually, it is the job of the Contractor to manage the Contractor's Staff. However, USACE Representatives can go to the [Administration > Prime Contractor > Contractor Staff](#) tab, to edit a staff member and check the box to make an individual Contractor staff inactive if needed.

**Contractor Staff**

**Staff Information**

Account ID (work email) my@email.com

First Name First

Last Name Last

**Administrator Rights**

Has Administrator Rights Administrator rights for Contractor Staff grants ALL permissions to the user. This includes the ability to set permissions for other users and to create other administrators.

**Inactive Staff**

Inactive staff member

Checking the [Inactive staff member](#) checkbox does not log out the user. Therefore, if an employee has been terminated, deleting the account is recommended.

### 5.12.4 Preventing Contractor Access to the Contract Temporarily

If a contract is under litigation or for any reason the USACE Representative needs to prevent all Contractors from changing data in the contract. To do this go into the [Prime Contractor](#) module and click on the [Prevent Contractor Mode Access](#) button below:

Add Prime Contractor from Entered Info

**Prime Contractor**

Prime Contractor Info Contractor Staff

**Prime Contractor Information**

RMS 3 Prime Contractor E1000118 - The Ranger Group **Prevent Contractor Mode Access**

UEI Number 999999999999 Copy UEI and Contractor Information Cage Code RANG118

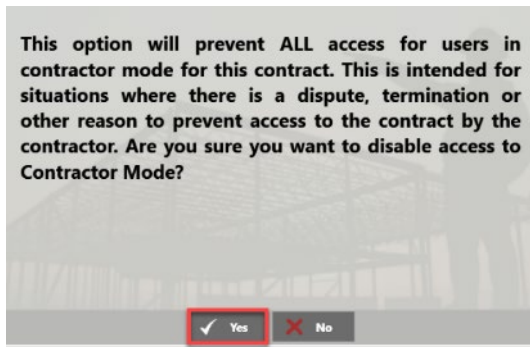
Responsibility Code PRIM NAICS Code 000001

Contractor Full Name The Ranger Group Contractor Short Name

Send Mail To Contractor Home Office DUNS No. 789377442

Payee Office <Not Assigned>





Clicking yes prevents any Contractor Staff from accessing or modifying the specific contract opened until the button [Allow Contractor Mode Access](#) is clicked.

**This option will allow access for users in contractor mode for this contract. Are you sure you want to allow access to Contractor Mode?**

### 5.12.5 Useful Information on Prime Contractors

1. RMS Prime Contractor must be set on a per contract basis for Contractor Mode to access the opened contract.
2. Many contracts can be assigned to a single Prime Contractor at once.
3. Any staff assigned to the Prime Contractor will have access to the contracts that the Prime Contractor is assigned if the users are Administrators. Conversely, using user Roles, a Contractor Administrator for the contract would need to set up and assign User Roles for specific contracts.
4. It is usually the job of the USACE Representative to assign only the first Contractor Staff (and assign as an Administrator), from that point forward, the Contractor will add additional staff to the Prime Contractor Staff and assign User Roles within the contract.
5. It is easy for Contractors to make every staff an Administrator, but this is dangerous as any Administrator can add/remove additional staff and modify all contracts that

the Prime Contractor has access to. To avoid this, advise the Contractor to set up User Roles to limit access and allow for greater control of data.

6. If the desired Prime Contractor does not show in the list of Prime Contractors, an RMS District Administrator will need to add that Prime Contractor to the list of Prime Contractors in the [District Office > Prime Contractors](#) module.
7. UEI No, Full Name, Cage Code, NAICS code can all be pulled automatically by clicking the [Copy UEI and Contractor Information](#) button (use the search field to find the Prime Contractor).
8. Some USACE Representatives help the Contractors by registering the Contractor's USACE email addresses as Contractor accounts, getting read only access to Contractor Mode. This allows the USACE Representative the ability to see what the Contractor sees.
9. Payee Office comes from CEFMS, which gets this information from SAM.gov. Payee Office information cannot be manually entered into RMS.
10. If the Linked to Login Account never switches from a No, most likely the email address entered was incorrect or the Contractor used a different account to register. Also, an attempt to log in and click [Update](#) on the list of Primes may not have occurred, yet.

## 5.13 Subcontractors

Subcontractors			
Contractor Full Name	Responsibility Code	Trade	Subcontract Amount
Building Concepts of America	MTPL	Metal Panels	\$601,676.00
Building Science Innovations	AIR		\$8,750.00
Capital Commissioning	COMA	Commissioning	\$90,000.00
CB Flooring	CBF		\$37,349.00
Ceiling & Partitions	RAFR		\$255,400.00
Ceramic Tile Supply	CABT	Cabinetry/Casework	\$16,971.00
Chem Mid Atlantic	DOOR	Doors, Frames and Hardwar	\$109,418.00
CJ Miller	SITE	Earthwork and Utilities	\$1,415,307.00
CJ Miller, LLC	EART		\$0.00
Classic Daylighting	TUBD	Vault/Blast Doors	\$177,000.00
Commercial Scapes, Inc.	LAND	Landscaping/Irrigation	\$92,154.00
Complete Contracting Services, LLC	ICON	Drywall/Gypsum Board	\$473,629.00
Daly Masonry	MASO	Masonry	\$552,900.00
Data Communications	DCOM	Communications	\$0.00
Dewberry & Davis, LLC	SVEY	Surveying	\$26,000.00
Dillion Lightning Pr	LPRT	Lightning Protection	\$0.00

### 5.13.1 Introduction to Subcontractors

The [Subcontractors](#) module is where the Prime Contractor can maintain a list of Subcontractors for the jobsite and track performance and compliance with contract requirements.

The [Subcontractors](#) module is linked to various other modules in RMS, such as the Daily Reports and Pay Activities. Subcontractor Responsibility Codes can be imported into RMS via Primavera by going to the [Import/Export](#) tab and choosing the [Network Analysis Schedule \(NAS\)](#) module or by manual entry from the [Subcontractors](#) module. If imported from Primavera users can

proceed to the Subcontractors screen to fill in the full name, amount subcontracted (for first tier subs) and other pertinent information.

### 5.13.2 Adding a Subcontractor

Clicking the **Add** button will prompt the user for a 4-character **Contractor Code**. This 4-character alphanumeric code is a unique code that identifies each Subcontractor.

The screenshot shows the 'Subcontractors' screen with a table containing columns for Contractor Full Name, Responsibility Code, Trade, and Subcontract Amount. The 'Add' button is highlighted with a red box. A red arrow points from this button to the 'RMS Add View' dialog box titled 'Add Subcontractor'. The dialog box contains the text 'The following information is required to add a new Subcontractor' and a text input field for 'Contractor Code' with the value '12AB'. The 'OK' button is also highlighted with a red box. A large red arrow points from the dialog box to the 'Subcontractor' form below.

The 'Subcontractor' form contains the following fields and options:

- Resp Code: 12AB
- Contractor Short Name: [Text Input]
- Contractor Full Name: [Text Input]
- First Day Onsite: [Date Picker] 15
- Last Day Onsite: [Date Picker] 15
- Address - 1: [Text Input]
- Address - 2: [Text Input]
- Address - 3: [Text Input]
- Trade: <Not Set>
- POC: [Text Input]
- Office Phone: [Text Input]
- Office Fax: [Text Input]
- Subcontract Amount: [Text Input] \$0.00
- Contractor is a small business
- Insurance Required?
- Payroll Required?
- Payrolls ending day of week: [Dropdown] \*Payroll week ending day should be selected
- Use Last Day as Payroll end override?
- Contractor is a Second Tier Sub

**Contractor Short Name:** Enter an abbreviated name for the Subcontractor to be used in reports with limited space. This field is limited to 20 characters.

**Contractor Full Name:** Enter the Subcontractor's full name. This field is limited to 60 characters.

**First/Last Day on Site:** One location where a Subcontractor's first and last day on site are entered. This field cannot be edited in Government Mode.

**Address:** Enter the Subcontractor's mailing address.

**Trade:** Click on the box and select the Subcontractor's trade from the displayed lookup list. If the applicable trade cannot be found in the table, the table can be updated in the [District Library | Contractor Trades](#) module by a District Administrator. After the library is updated, the trade can be selected from the updated listing.

**POC/Office Phone/Office Fax:** Enter the Subcontractor's point of contact information.

**Subcontract Amount:** Enter the full amount assigned/allowed of the subcontract. This is required by the Prompt Payment Act and is used in the Progress Payment Request.

**Contractor is a small business:** Check this box if applicable.

**Insurance Required?:** Check this box to track insurance validity dates.

**Payroll Required?:** This box will be checked in Contractor Mode to track submitted payrolls. This field cannot be edited in Government Mode.

**Payrolls ending day of week:** The day of the week that marks the end of the Subcontractor's typical payroll work week will be entered here in Contractor Mode. This field cannot be edited in Government Mode.

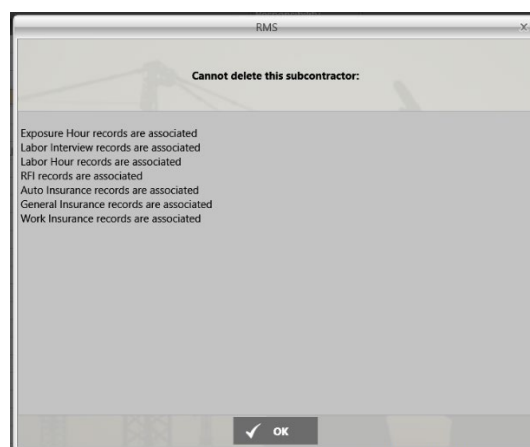
**Use Last Day as Payroll end override?:** This option is used to override the Payrolls ending day of week option with the Last Day on Site date entered for the Subcontractor. For example, if the payroll ending day of week is set to Sunday but the last day on site date falls on a Friday, the last payroll for that Subcontractor will be on that Friday instead of the normal Sunday. This field cannot be edited in Government Mode.

**Contractor is a Second Tier Sub:** Check this box, if applicable.

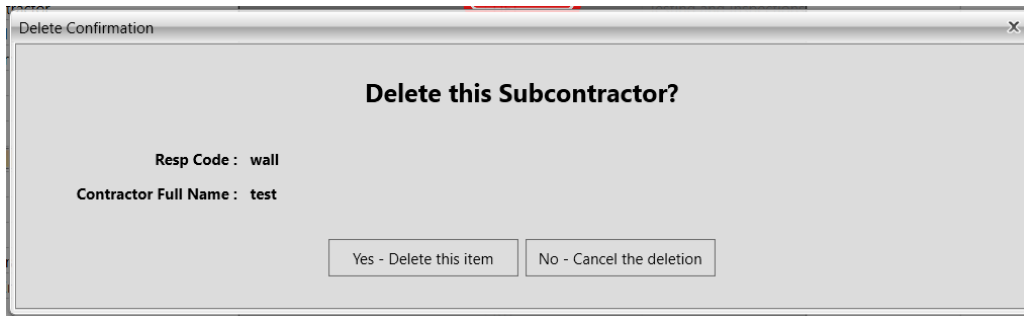
### 5.13.3 Deleting a Subcontractor

Deleting a Subcontractor is as simple as selecting a Subcontractor from the list of Subcontractors then selecting the [Delete](#) button.

**Note:** RMS does not allow deletion of Subcontractors if there are records associated with the Subcontractor.



Confirm deletion in the pop-up window that appears.



## 5.14 Contractors on Site

All Contractors		Contractors on Site		Contractors not on Site	
295		11		284	

All Contractors					
Drag a column header and drop it here to group by that column					
Contractor	Resp Code	Trade	First Day	Last Day	
> 02te	02te		08/16/2019	08/16/2019	
100	100	Carpet			
1st Electric, Inc.	ELET		11/18/2018		
2 test	Test		08/03/2018	10/31/2018	
4 Testing Sub Contractor	TTT		08/01/2019	04/24/2020	
453	453		03/09/2018	03/09/2018	
ABAT	ABAT		03/01/2018	03/31/2018	
Absolute Finishes	ABSO		05/23/2018		
ACC	ACC				
ACCS	ACCS		01/27/2019	01/31/2019	
ACON	ACON				
ACST	ACST		11/23/2018		
ACT	ACT				
Advanced Masonry	ADVA	Masonry			
AE	AE		07/01/2018	11/23/2018	
ALUM	ALUM				
ARCH	ARCH				

**Contractors on Site** is a convenient module that allows the Government to view all the Subcontractors with First and Last Day dates as well as the Responsibility Code and Trade.

The module allows 3 filtering options: **All Contractors**, **Contractors on Site**, and **Contractors not on site** by clicking on the respective blue tiles at the top.

- The **All Contractors** tile lists all the Subcontractors in the contract.
- The **Contractors on Site** tile lists all the Contractors that have a First Day date but not a Last Day date.
- The **Contractors not on Site** tile lists all the Contractors that have no dates, both dates, or only the Last Day date filled out.

This module allows the Government to double click in either **First Day** or **Last Day** columns to enter dates, if desired.



## 5.15 Contractor Insurance

<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="background-color: #0070c0; color: white; padding: 5px; border: 1px solid #ccc;">All 47</div> <div style="background-color: #0070c0; color: white; padding: 5px; border: 1px solid #ccc;">Insurance Missing 16</div> <div style="background-color: #0070c0; color: white; padding: 5px; border: 1px solid #ccc;">SF1413 Missing 36</div> <div style="background-color: #0070c0; color: white; padding: 5px; border: 1px solid #ccc;">Expired Insurance 3</div> </div>							
<span>Edit</span> <span style="margin-left: 150px;">All</span> <span style="float: right;">Search <input type="text"/></span> <span style="float: right;">Export</span>							
Drag a column header and drop it here to group by that column							
Contractor Name	Responsibility Code	Trade	General Insurance	Auto Insurance	Workers' Comp	Form SF 1413	
WHH Nisqually-Garco JV 2	PRIM	PRIM	05/17/2021	05/17/2021	10/01/2021	08/19/2019	
Saybr Contractors, Inc	USTD	Demolition/Wreck	05/01/2020	05/01/2020	05/01/2020	10/04/2019	
Blue Mountain Mechanical, Inc	BMEC	Mechanical	09/06/2020	09/06/2020	09/06/2020	10/16/2019	
NCS Corporation	BCTR	Specialities	04/04/2021	04/04/2021	04/04/2021	10/21/2019	
McClintock & Turk, Inc	FUEL	Specialities	10/20/2020	10/20/2020	10/20/2020	11/05/2019	
Apex Engineering	SRVY	Surveying	05/22/2020	05/22/2020	01/01/2021		
PR Systems, LLC	GRND	Demolition/Wreck	02/15/2020	02/15/2020	02/15/2020	01/08/2020	
Galloway Environmental	ABTM	Asbestos/HTRW	11/21/2020	11/21/2020	11/21/2020		
Johnston Construction Company Inc.	MSRY	Masonry	12/10/2020	12/10/2020	12/10/2020	01/15/2020	
Electro Tech Corporation	ELEC	Electrical	11/25/2020	11/25/2020	11/25/2020		
Lakeside Industires	APHT	Asphalt Paving					
Sabelhaus West, Inc	PANT	Painting/Wall Cov	11/01/2020	11/01/2020	11/01/2020	02/20/2020	
LMO Construction	ACT	Ceiling Tile	N/A	N/A	N/A		
AFTEC (Fuel Tanks)	AFTE	Specialities	N/A	N/A	N/A		
Lakeside Industries	ASPH	Asphalt Paving	N/A	N/A	N/A		
LMO Construction	BATH	Toilet Accessories	N/A	N/A	N/A		
Bay & Associates, LLC	BAYA	Specialities	N/A	N/A	N/A		
LMO Construction	BLND	Window Blinds	N/A	N/A	N/A		
LMO Construction	CARP	Framing/Rough Ci	N/A	N/A	N/A		

This module is used to keep track of the Prime Contractor's and Subcontractors' insurance expiration dates. Before any Contractor is allowed to perform any work on the contract, the insurance requirements set forth in the contract's "Required Insurance" clause must be met. Where the Financial Responsibility Compulsory Insurance Law of the State in which the contract is located requires higher limits, policies should provide coverage of at least those limits.

An [SF1413, Statement and Acknowledgment](#), is required from every Subcontractor. Its receipt is also logged in this module.

While payroll data may be entered by either Contractor or Government, it is the Prime Contractor's responsibility to ensure all required insurance data is current and correct.

This module can be sorted by 4 blue tiles at the top: All, Insurance Missing, SF1413 Missing, and Expired Insurance.

**Note:** Dates shown in RED indicate that the Contractor is reported to be onsite either after insurance has expired and/or before an SF1413 has been executed.

Editing Contractor Insurance allows dates to be input:

**Contractor Insurance [METP] - TEST**

**Insurance Expiration Dates**

General Insurance Expires 8/26/2023 15

Auto Insurance Expires 8/31/2023 15

Workman Comp Expires 8/31/2023 15

Enter applicable dates.

**Form SF 1413 Statement and Acknowledgment**

SF1413 Attached 7/10/2023 15

Contractor Insurance - [METP] *CONTRACTOR: Complete a document package for this Subcontractor Insurance and Form SF 1413, and submit it using this document package manager. The document package should include the insurance documents, signed Form SF 1413, and any applicable supporting documents.*

Accept	Add	Title of Package	Status	No.
Return	Edit	> Contractor Insurance - [METP](2)	Not Ready	2
Delete		Contractor Insurance - [METP]	Not Ready	1

**Note:** Many Document Packages can be added and reviewed.

**Note:** For dates to appear as Not Applicable, go to the Administration tab, then to the **Subcontractors** module. Navigate to the correct Subcontractor and uncheck the **Insurance Required?** checkbox.

When the Contractor sends insurance documents or the SF1413 form to the Government, the **Document Type** column for those documents will be set to **Insurance Certificates** by default. However, the SF1413 is usually categorized as Statement and Acknowledgment (SF 1413). Therefore, when receiving these Insurance Document Packages, be sure to use the dropdown menu in the **Document Type** column to select the appropriate type for each document.

**Document Package: Contractor Insurance - [METP]**

All Attachments	PDF Documents	Word Documents	Excel Files	Powerpoint Files
1	0	1	0	0
	JPEG/JPG Images	Text Files	CSV Files	Email
	0	0	0	0

Drag and Drop Attachment Files Here

Generate Letter

Sign Selected Documents

Export Selected Documents

Add Edit Delete

**All Attachments**

Primary	Date of the Document	Document Title	Contractor Signature Status	Government Signature Status	Document Type
<input type="checkbox"/>	5/5/2025 1:48:1	Contractor Insurance - [METP] - Insurance	Not Signed	Not Signed	Insurance Certificates

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling procedures should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

**Note:** The Contractor cannot see this column and cannot update this field when sending the documents in Contractor Mode.

## 5.16 Contractor Payrolls

Contractor Payrolls								Contractors Onsite
All		Submitted for Review		Contractor Outstanding		Approved		
5113		71		5018		24		

All Payrolls								Search	Export
Payroll Number	Resp Code	Contractor Name	Payroll Date	Number of Employ	Payroll hours	Accepted/Rejected Date	Payroll Status		
>	4 CP	4 CP	05/03/2025	0	0		Draft Payroll		
	7894	7894	05/03/2025	0	0		Draft Payroll		
	ABAR	ABAR	05/03/2025	0	0		Draft Payroll		
	ACON	ACON	05/03/2025	0	0		Draft Payroll		
	ALUM	ALUM	05/03/2025	0	0		Draft Payroll		
	ARCH	ARCH	05/03/2025	0	0		Draft Payroll		
	aubu	aubu	05/03/2025	0	0		Draft Payroll		
	AVAV	AVAV	05/03/2025	0	0		Draft Payroll		
	BCON	BCON	05/03/2025	0	0		Draft Payroll		
	chec	testing 123	05/03/2025	0	0		Draft Payroll		
	RSDH	Support Center Subcontractor	05/03/2025	0	0		Draft Payroll		
	CAFP	Harris Fire Protection	05/02/2025	0	0		Draft Payroll		
	LAND	Commercial Scapes, Inc.	05/02/2025	0	0		Draft Payroll		
	SSTL	PICO Industries	05/02/2025	0	0		Draft Payroll		

When payroll tracking is required, the Prime Contractor must keep all payroll reporting up-to-date and current. All Military and Civil Construction projects performed in the United States that are governed by the requirements of the Davis-Bacon Act require tracking and documenting of Contractor Payrolls. In some cases, this may also be required on contracts performed in overseas (OCONUS) locations. A Contract's General Provisions can be used to determine this requirement.

**Note:** Access to this module has been limited to users who have completed the UPASS [PII Training](#). Users that log into RMS using a CAC will have access to this module by default. However, users who log in with a username and password must submit PII Training Certification proof to the District Admin for the user's District to obtain access to this module. To get access to PII in RMS, please contact the District Admin for the District. If the District Admin is not known, contact the help desk (call 442-333-1011 or submit a [ticket request](#)) to get a list for the district in which the user will need PII access.

While payroll data may be entered by either Contractor or Government, it is the Prime Contractor's responsibility to ensure all required payroll data is current and correct.

Information in this module can be filtered 4 ways using the blue tiles at the top:

- **All** – If a Subcontractor or week is not shown in this list, check to ensure the [Payroll Required?](#) box is checked on the Subcontractor information screen and a Last Day On Site date for the missing Subcontractor has not been entered.
- **Submitted for Review** – Payrolls that have been submitted to the Government will show here.
- **Contractor Outstanding** – Payrolls that are waiting for Contractor entry will show here.
- **Approved** – Payrolls that have been accepted by the Government will show here.

**Note:** The [Contractors on Site](#) button on the top right of the module is a convenient view that shows the same view as the [Contractors on Site](#) module discussed previously.

**Contractor Payrolls**
Contractors On Site

All  
**2720**

Submitted for Review  
**14**

Contractor Outstanding  
**2697**

Approved  
**9**

### 5.16.1 Managing Contractor Payrolls

When the [Contractor Payrolls](#) module is opened by any user with Read/Write permission in this area, RMS automatically creates weekly payroll records for every Contractor that is reported onsite. A payroll record will be created if a Contractor is reported to be onsite and the selected milestone to stop payrolls, set up in the [Contract Setup](#) module, does not have an actual date.

**Note:** If the ending milestone selection was not chosen in [Contract Setup](#), then the Contractor Final Payment milestone’s actual date will be the date payroll stops for the contract.

Open the [Contractor Payrolls](#) module to review weekly payroll data. Click on the [Submitted for Review](#) filter.

**Contractor Payrolls**
Contractors Onsite

All  
**5113**

Submitted for Review  
**71**

Contractor Outstanding  
**5018**

Approved  
**24**

Edit
**Contractor Payrolls Submitted for Review**
Search 
Export

Drag a column header and drop it here to group by that column

Payroll Number	Resp Code	Contractor Name	Payroll Date	Number of Employ	Payroll hours	Accepted/Rejected Date	Payroll Status
> 9	4 CP	4 CP	04/12/2025	0	0	4/9/2025	Submitted to Government
1	4 CP	4 CP	09/21/2024	0	0		Non Work Week
1	7894	7894	09/21/2024	0	0		Non Work Week
67	ABAR	ABAR	09/21/2024	0	0		Non Work Week
4	ACON	ACON	09/21/2024	0	0		Non Work Week
2	ALUM	ALUM	09/21/2024	0	0		Non Work Week
2	ARCH	ARCH	09/21/2024	0	0		Submitted to Government
124	AVAV	AVAV	09/21/2024	0	0		Non Work Week
2	CAFP	Harris Fire Protection	09/20/2024	0	0		Non Work Week
12344	BCON	BCON	05/25/2024	0	0		Submitted to Government
12344	ACON	ACON	05/18/2024	0	0		Submitted to Government
test123	ALUM	ALUM	05/18/2024	0	0		Submitted to Government
asdf	ARCH	ARCH	05/18/2024	0	0	8/21/2024	Submitted to Government
5	BCON	BCON	05/27/2023	0	0		Non Work Week
1	chec	testing 123	05/27/2023	1	40		Submitted to Government
1	ALUM	ALUM	05/20/2023	3	12		Submitted to Government
6	SITE	CJ Miller	04/07/2023	32	500		Submitted to Government

**Note:** Only Payrolls submitted for review can be edited by the Government.

**Contractor Payroll Edit**

**Contractor**

Contractor Name: Sub Contractor for Training      Payroll Date: 4/8/2022

Payroll Number: 123456      (Optional) Reference No.       Non Work Week

Number of Employees: 0      Payroll hours: 0

Contractor Comments: Comments

Submitted Date: 6/18/2024

Payroll Ready for Review     

**Government**

Date Reviewed:       Payroll Accepted       Payroll Rejected

Government Comments:

Weekly Payroll 1234 4/8/2022      GOVERNMENT: Complete a document package for this weekly payroll using this document package manager.

Add	Title of Package	Status	No.
Edit	> Weekly Payroll 1234 4/8/2022	In Review	1
Delete			

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

**Revision History**

View      Revision History

Revision Date	Action	Revised By
> 6/18/2024 7:05:00 PM UTC	Submit	

From here, the Government can use the [Payroll Accepted](#) or [Payroll Rejected](#) checkboxes.

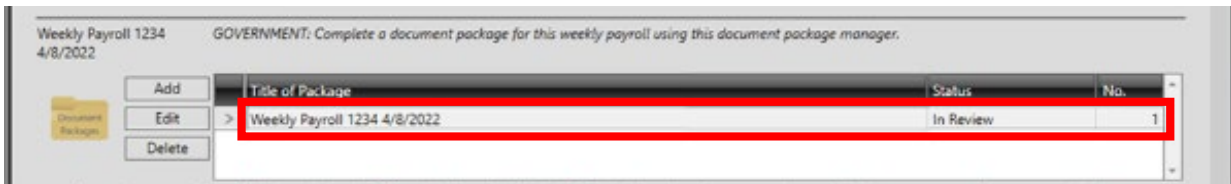
- Checking the [Payroll Accepted](#) box will accept the payroll and any associated Document Packages.
- Checking the [Payroll Rejected](#) box will send the payroll and any associated Document Packages back to the Contractor for updates and/or corrections.

At the bottom of the screen a revision history is kept to capture any updates made over time on this specific payroll.

**Note:** The Document Package for the [Contractor Payrolls](#) module will be locked for viewing by the Contractor once the Document Package has been submitted to the Government for review. That is to protect any potential [PII](#) data the document may contain.

**Note:** The [Legacy Revision History](#) button will be available to view revision history information present on screens for payrolls created and/or edited before the release of patch 491 on July 25, 2024.

Double click on the Document Package to view the files the Contractor has submitted to the Government with the open payroll.



Review the files that were attached for authenticity, accuracy, and completeness. If anything is missing, inaccurate or incomplete, check the [Payroll Rejected](#) checkbox to reject and return the payroll along with the Document Package(s) for corrections.

**Document Package: Weekly Payroll 1234 4/8/2022**

<b>All Attachments</b> 1	PDF Documents 1	Word Documents 0	Excel Files 0	Powerpoint Files 0	Drag and Drop Attachment Files Here 	Generate Letter
	JPEG/JPG Images 0	Text Files 0	CSV Files 0	Email 0		Sign Selected Documents

Export Selected Documents

---

**All Attachments** Search  Export

Primary	Date of the Document	Document Title	Contractor Signature Status	Government Signature Status
<input type="checkbox"/>	6/18/2024 2:04:44 P	Weekly Payroll 1234 4/8/2022 - Test.pdf	Electronically Signed	Not Signed

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

Individual File Information

Date of the Document	6/18/2024	Signed By	<input type="text"/>
Document Title	Weekly Payroll 1234 4/8/2022 - Test.pdf		
Description	<div style="border: 1px solid gray; height: 40px;"></div>		

Manually signed by Contractor  
 Manually signed by Government

Document Package

GOVERNMENT: Document package processing will be handled by the view.

Government Review Notes	<div style="border: 1px solid gray; height: 40px;"></div>
Contractor Notes to Government	<div style="border: 1px solid gray; height: 40px;"></div>

If everything is authentic, accurate and complete, then sign the documents as required by the District's or contract's policies. Navigate back to the payroll edit view and check the [Accept Payroll](#) checkbox to accept the payroll and any associated Document Packages.

### Contractor Payroll Edit

**Contractor**

Contractor Name: Sub Contractor for Training Payroll Date: 4/8/2022

Payroll Number: 123456 (Optional) Reference No.  Non Work Week

Number of Employees: 0 Payroll hours: 0

Contractor Comments:

Submitted Date: 9/17/2024  Payroll Ready for Review

---

**Government**

Date Reviewed: 9/17/2024

Payroll Accepted  Payroll Rejected

Government Comments:

---

Weekly Payroll 1234 GOVERNMENT: Complete a document package for this weekly payroll using this document package manager.

4/8/2022

	Title of Package	Status	No.
Add	>	Accepted	1

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

---

**Revision History**

Revision Date	Action	Revised By
> 9/17/2024 9:57:52 PM UTC	Accept	
9/17/2024 9:43:51 PM UTC	Submit	
9/17/2024 9:42:49 PM UTC	Return	
6/18/2024 7:05:00 PM UTC	Submit	

## 5.17 Labor Interviews

Labor Interviews			
Interview Date	Employer/Subcontractor	Labor Classification	Interview Agrees with Payroll
> 08/18/2019	CONC	SURVEYOR	Yes
05/15/2019	CAIS	UXO TECHNICIAN	Undetermined
04/30/2019	AFLR	DECK HAND	Yes

Labor Interviews is a way to record interview information and verify Labor Classifications and Wage Rate. This module includes a Document Package Manager for uploading scanned documents or other forms associated with the interview. This module assists the individual in charge of payroll by asking the question: *Is this Labor Interview Information in agreement with Payroll Data?*

**Note:** Access to this module has been limited to user's who have completed the UPASS PII Training. Users that log into RMS using a CAC will have access to this module, however, users who log in with a username, must submit PII Training Certification proof to the District Admin for the user's District to obtain access to this module. To get access to PII in RMS, please contact the District Admin for the District. There is a list of all District Admins on SharePoint accessible from a Government computer. A link to this list can also be provided

from the RMS Support Center, please open a ticket entitled (list for District Admins) to obtain this link.

Clicking [Add](#) or [Edit](#) results in a display a view similar to the one below:

The screenshot shows the 'Labor Standard Interview' form. The form is titled 'Labor Standard Interview' and contains the following fields and sections:

- Interview Date:** 11/15/2022
- Employer:** PRIM - AISOW Technologies Corporation
- Employee Name:** Jack Smith
- Labor Classification:** STRUCTURAL ENGINEER (with a 'Select' button)
- Wage Rate:** \$45.50 hr
- Sick Leave Confirmed

Below the main form is a section titled 'For Use by Payroll Checker':

- Is Labor Interview Information in agreement with Payroll Data?:** Yes
- Comments on Payroll:** Payroll data matches, looks good here

At the bottom, there is a section for document packages:

Labor Interview QA-00003 Government: Complete a document package for this Labor Interview using this document package manager. The document package should include any applicable supporting documents.

Complete	Add	Title of Package	Status	No.
	Edit	> Labor Interview QA-00003 12/30/2022	Not Ready	1

Buttons: Complete, Add, Edit, Delete

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

Here, the [Employer](#) (Subcontractor) can be selected to choose which Subcontractor the employee works for. The employee's name can be recorded in the [Employee Name](#) box. Next, the [Labor Classification](#) can be selected. [Wage Rate](#) and whether or not sick leave is confirmed can also be entered.

Multiple Document Packages can be added, reviewed, accepted, and returned for corrections. This is useful if additional documentation/forms need to be attached to this interview (scanned documents, etc.).

Once all the data is input in this module, click the [Back](#) button to go back to the Contract Selection screen.

Deleting Labor Interviews will prompt the user with a confirmation:

The screenshot shows a 'Delete Confirmation' dialog box with the following content:

**Delete this Labor Interview?**

Interview ID : QA-00002

Buttons: Yes - Delete this item, No - Cancel the deletion

**Note:** Subcontractors can be added via the [Administration | Subcontractor](#) module. Labor Classifications come from the [District Library | Labor Classifications](#) module.

## 5.18 Action Item Control

The **Action Item Control** module contains a list of contract actions and allows control over which actions are enabled/disabled for the contract. Users can be assigned to each action listed in this module, as well. At the top of the screen, the filtering options available to condense the view are grouped by **Government or Contractor**, **Government Action Items**, and **Contractor Action Items**. Each of these views can be filtered further by priority: **Low**, **Medium**, or **High**.

The screenshot displays the 'Contract Action Item Controls - - All' interface. At the top, there are three main sections: 'Government or Contractor', 'Government Action Items', and 'Contractor Action Items'. Each section has a grid of filters for 'All', 'Low', 'Medium', and 'High' priorities. The counts for each filter are: Government or Contractor (All: 62, Low: 2, Medium: 14, High: 46), Government Action Items (All: 10, Low: 2, Medium: 6, High: 2), and Contractor Action Items (All: 52, Low: 0, Medium: 8, High: 44). Below the filters, there are buttons for 'Copy', 'Enable All', and 'Disable All', along with a search bar and an 'Export' button. The main table has columns for 'Government or Contractor', 'Item Type', 'Title', 'Alert Level', 'Enabled', and 'Responsible Party Name'. A detail view is open for the item 'CLIN Activities not Balanced', showing its title and description, and options to 'Enabled' (selected) or 'Disabled' it. A '<Not Assigned>' button is also visible in the detail view.

Government or Contractor				Government Action Items				Contractor Action Items			
All	Low	Medium	High	All	Low	Medium	High	All	Low	Medium	High
62	2	14	46	10	2	6	2	52	0	8	44

Government or Contractor	Item Type	Title	Alert Level	Enabled	Responsible Party Name
Contractor	CLIN	CLIN Activities not Balanced	Medium	<input checked="" type="checkbox"/>	
Contractor	Equipment	Equipment missing safety check date	High	<input checked="" type="checkbox"/>	
Contractor	Equipment	Equipment safety check due	High	<input type="checkbox"/>	
Contractor	Exposure Hours	Exposure hours not complete	High	<input type="checkbox"/>	
Contractor	Feature	Feature has no activities assigned	High	<input type="checkbox"/>	
Contractor	Feature	Feature Preparatory Meeting due	High	<input type="checkbox"/>	
Contractor	Feature	Feature Initial Meeting due	High	<input type="checkbox"/>	
Government	Letter	Letter needs Government Answer	Medium	<input type="checkbox"/>	
Contractor	Letter	Letter needs Contractor Answer	Medium	<input type="checkbox"/>	
Government	Milestone Event	Milestone Not Scheduled	Low	<input type="checkbox"/>	
Government	Milestone Event	Milestone Reschedule Needed	Low	<input type="checkbox"/>	
Contractor	Modification	Modification contractor signature due	High	<input type="checkbox"/>	
Government	Pay Activity	Activity Final Follow Up Needed	Medium	<input type="checkbox"/>	
Contractor	Pay Activity	Activity scheduled finish date has passed	High	<input type="checkbox"/>	

Detail View for 'CLIN Activities not Balanced':

Title: CLIN Activities not Balanced

Description: [Empty]

Enabled:  Enabled,  Disabled

<Not Assigned>

The options for these actions can be manually set, but the **Copy** button is available to copy the Action Item Control setup from another contract. Clicking this button will display a Contract List lookup. After selecting the desired contract, the **Action Item Control** module will update to match the Action Item options set in the selected contract.



The screenshot shows the 'Government or Contractor - All' interface. At the top, there are summary statistics for Government or Contractor (All: 62, Low: 2, Medium: 14, High: 46), Government Action Items (All: 10, Low: 2, Medium: 6, High: 2), and Contractor Action Items (All: 52, Low: 0, Medium: 8, High: 44). Below these are buttons for 'Copy', 'Enable All', and 'Disable All'. A table lists items with columns for 'Government or Contractor', 'Item Type', 'Title', 'Alert Level', 'Enabled', and 'Responsible Party Name'. A modal dialog box is open with the text 'Are you sure you want to disable ALL action items?' and 'Yes' and 'No' buttons. A red box highlights the 'Disable All' button, another red box highlights the 'Enabled' column, and a red arrow points from the 'Disable All' button to the 'Yes' button.

**Note:** By default, new contracts in RMS will have all action items disabled.

This module correlates with the Data Integrity Reports found in the **Contract Reports** module under the **ADMIN** menu. Data Integrity Reports are available for both Contractor and Government.

All Reports	Administration Reports	Financial Reports	QA/QC Reports	Submittal Reports	Schedule Reports	Closeout Reports
95	22	23	30	6	8	6

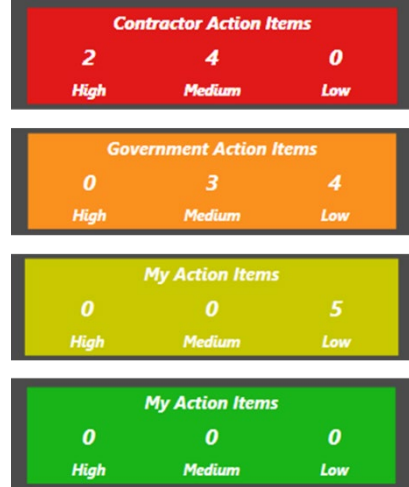
Report Title	Report Menu	Author	Developed By
ADMIN			
Data Integrity Report - Contractor	ADMIN	RMS Center	RMS Center
Data Integrity Report - Government	ADMIN	RMS Center	RMS Center

For assistance with resolving common items found in these reports, please see [Appendix C](#).

with the colors used in the Action Items Dashboard shown on the Contract Menu:



- A **red** box indicates there is at least one High priority action item that is past due, with the possibility that there may also be medium and low action items past due as well.
- An **orange** box indicates there is at least one Medium priority action item that is past due, with the possibility that there may also be low action items past due, as well.
- A **yellow** box indicates there is at least one Low priority action item that is past due.
- A **green** box indicates there are no action items past due.



The Action Items Dashboard view will display when clicking on any of the three tiles on the Contract Menu: [Government Action Items](#), [Contractor Action Items](#), and [My Action Items](#). The section for [My Action Items](#) will show only the items assigned to the currently logged in user.

Government Action Items				Contractor Action Items				My Action Items			
All	Low	Medium	High	All	Low	Medium	High	All	Low	Medium	High
5	5	0	0	0	0	0	0	5	5	0	0

My Action Items - All				
Item Type	Item Title	Action	Alert Level	Responsible Party Name
Milestone Event	Milestone Reschedule Needed	Reschedule date for Milestone: Release of Claims Received	Low	
Milestone Event	Milestone Reschedule Needed	Reschedule date for Milestone: Release of Claims Received	Low	
Milestone Event	Milestone Reschedule Needed	Reschedule date for Milestone: Contract Physical Completion	Low	
Milestone Event	Milestone Reschedule Needed	Reschedule date for Milestone: Release of Claims Received	Low	
Milestone Event	Milestone Reschedule Needed	Reschedule date for Milestone: NTP Acknowledged	Low	

Action Item Reports tie into this module, as well. In the [Contract Reports](#) module under the [ADMIN](#) menu, Action Item reports for both Contractor and Government are available. For assistance with resolving common action items, please see [Appendix C](#).

### 5.19 Contract Notification Control

[Contract Notification Control](#) allows users to receive notification(s) for certain in-application actions on the Government and Contractor side.

**Contract Notification Control**

NOTIFICATIONS: RMS can send notifications when certain events related to this Contract occur. You can receive notifications within the RMS Application and/or via email. Simply check the boxes below for the notifications you wish to receive.

**Your notifications will be sent to:**

Work email address

Contract Event	Notify in RMS	Notify via Email
Activity Hazard Analysis received from Contractor	<input type="checkbox"/>	<input type="checkbox"/>
Activity Hazard Analysis returned to Contractor	<input type="checkbox"/>	<input type="checkbox"/>
Correspondence - Letter Accepted by Government	<input type="checkbox"/>	<input type="checkbox"/>
Correspondence - Letter sent by Contractor to Government	<input type="checkbox"/>	<input type="checkbox"/>
ENG 93 Contractor/Payee signature required	<input type="checkbox"/>	<input type="checkbox"/>
ENG 93 signed by Contractor/Payee	<input type="checkbox"/>	<input type="checkbox"/>
Payment completed by Contractor	<input type="checkbox"/>	<input type="checkbox"/>
Payment completed by Government	<input type="checkbox"/>	<input type="checkbox"/>
Payment returned to Contractor for Corrections	<input type="checkbox"/>	<input type="checkbox"/>
Payroll has been approved by the Government	<input type="checkbox"/>	<input type="checkbox"/>
Payroll has been rejected by the Government	<input type="checkbox"/>	<input type="checkbox"/>
Payroll has been submitted by the Contractor	<input type="checkbox"/>	<input type="checkbox"/>
QA Daily report completed by Government	<input type="checkbox"/>	<input type="checkbox"/>
QA Deficiency added to Daily Report	<input type="checkbox"/>	<input type="checkbox"/>
QC Daily report completed by Contractor	<input type="checkbox"/>	<input type="checkbox"/>
QC Daily reported weather delay by Contractor	<input type="checkbox"/>	<input type="checkbox"/>
QC Daily returned to Contractor for Corrections	<input type="checkbox"/>	<input type="checkbox"/>
QC Deficiency added to Daily Report	<input type="checkbox"/>	<input type="checkbox"/>
Request for Information completed by Government	<input type="checkbox"/>	<input type="checkbox"/>
Request for Information sent to Government by Contractor	<input type="checkbox"/>	<input type="checkbox"/>
SDEF Schedule accepted for import	<input type="checkbox"/>	<input type="checkbox"/>
SDEF Schedule import request rejected	<input type="checkbox"/>	<input type="checkbox"/>
SDEF Schedule submitted for import acceptance	<input type="checkbox"/>	<input type="checkbox"/>
Submittal Item added	<input type="checkbox"/>	<input type="checkbox"/>
Submittal Item deleted	<input type="checkbox"/>	<input type="checkbox"/>
Transmittal review completed by Government	<input type="checkbox"/>	<input type="checkbox"/>
Transmittal review completed by Secondary Reviewer	<input type="checkbox"/>	<input type="checkbox"/>

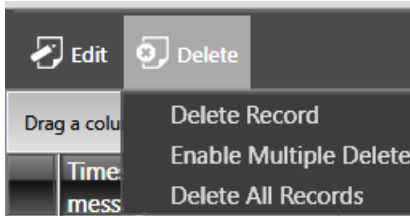
Notifications can be sent via in-app notifications and email by making the desired selection in the checkboxes under the corresponding columns:

- *Notify in RMS*
- *Notify via Email*

Notifications in RMS are accessible in the box at the bottom right corner of the application screen. This box will display the number of notification messages that have been received and unread as shown below.

**Note:** the text displayed in the Message notification section will be **RED** if the unread message count is greater than 0.





These notifications are on a per user, per contract basis. Notifications can be set up by the logged in user only and these notifications are unique per contract.

Notifications can also be set to go to any email entered by the user into the *Work email address* text box. However, any changes made to this field will change for every contract for the logged in user.

*For example: If Jane Sue is logged in and changes the *Work email address* field from jane@email.com to janesue@email.com, then all email notifications Jane has set up will go to the NEW email address for ALL contracts with email notifications turned on.*

## 5.20 Contractor Mode Record Locks

RMS allows Government users to lock selected records in order to prevent the contractor from making edits and/or deleting the locked record. To select records to lock, first open one of the collections shown below and then all records from that collection will be displayed and made available for locking/unlocking.

RMS Data Collection	Total Count	Locked Count	Unlocked Count
Submittal Items	360	2	358
QC Requirements	18	0	18

RMS allows specific records in the Submittal Items and QC Requirements areas to be locked by the Government so that the Contractor cannot modify the records.

Editing the Submittal Items, for example, brings up the following screen:

Summary: All Records: 605, Locked Records: 0, Unlocked Records: 605. Buttons: Lock All, Unlock All.

Register	Section	Item No	Date In	Description	Status	Block Contractor Changes	
>	01	"01 33 16.00 10"01 3	1	04/10/2020	Complete	<input type="checkbox"/>	
	01	"01 33 16.00 10"01 3	2		Outstanding	<input type="checkbox"/>	
	01	"01 33 16.00 10"01 3	3	04/03/2020	Complete	<input type="checkbox"/>	
	01	"01 33 29"01 33 29	1	02/14/2020	Testing for report	Outstanding	<input type="checkbox"/>
	01	"01 45 00.00 10"01 4	1	08/26/2019	Complete	<input type="checkbox"/>	
	01	"01 45 00.00 10"01 4	2.5		Test Spec	Outstanding	<input type="checkbox"/>
	01	"01 57 23"01 57 23	1	05/08/2020	Complete	<input type="checkbox"/>	
	01	"01 74 19"01 74 19	1	12/02/2019	Complete	<input type="checkbox"/>	

If desired, the Government can lock all records, unlock all records, or check to block specific records from modification by the Contractor.

All Records	Locked Records	Unlocked Records	Lock All
78	0	78	Unlock All

All QC Requirements Records			Search	Export
Drag a column header and drop it here to group by that column				
QCQA No.	Description	Block Contractor Changes		
> CT-00006	190327 Additional Activity reference - FM 200 Pressure Tested at 50psi for 30 minutes each Passed...	<input type="checkbox"/>		
CT-00007	Domstic Cold Water in bathrooms 127 & 128 tested and passed.	<input type="checkbox"/>		
CT-00008	Domestic water in Mech Room #1 tested at 100 PSI for 2 ½ hours and passed.	<input type="checkbox"/>		
CT-00009	FM200 Meggar Test passed	<input type="checkbox"/>		
CT-00010	Chilled & Hot Water and Gas piping pressure test	<input type="checkbox"/>		
CT-00014	Test completed box	<input type="checkbox"/>		

The **QC Requirements Records** view is remarkably similar to the **Submittal Items Records** view inside of the **Record Locks** module.

**Note:** Communication with the Contractor is recommended when locking modules to prevent modifications.

## 5.21 Mobile Files

Mobile files are a file viewer for images/files that were uploaded to RMS using the RMS Mobile application (No Longer Supported) that allows images taken on the Mobile App to be applied to the contract in various modules.

Mobile Files Uploaded to RMS					
Folders		Edit	Files	Search	Export
Drag a column header and drop it here to group by that column					
	Title	File Name	Type	Uploaded	
Mobile	test	test.jpeg	JPEG	07/03/2019	
Audio	another test without location	another test without location.jpeg	JPEG	07/03/2019	
Documents	Test	Test.jpeg	JPEG	11/12/2019	
Images	my new cup	my new cup.jpeg	JPEG	11/12/2019	
Notes	test release	test release.jpeg	JPEG	12/30/2019	
Other	testing	testing.jpeg	JPEG	11/12/2019	
Video	this is some image to test	this is some image to test.jpeg	JPEG	11/12/2019	
RMS	Testing Image for Production	Testing Image for Production.jpeg	JPEG	11/12/2019	
test	this is my ninja mug	this is my ninja mug.jpeg	JPEG	11/12/2019	
	this is a prod test	this is a prod test.jpeg	JPEG	11/12/2019	

## APPENDIX A – DEFINITIONS

ACO	Administrative Contracting Officer
CAC	Common Access Card
CAGE	Commercial and Government Entity
CAO	Contract Administration Office
CCD	Construction Complete Date
CEFMS	Corps of Engineers Financial Management System
CLIN	Contract Line Item Number
CM	Contractor Mode
COR	Contracting Officer Representative
CPARS	Contractor Performance Assessment Reporting System
CSI	Construction Specifications Institute
DFAR	Defense Federal Acquisition Regulation
DIS	Dredging Information System
DOD	Department of Defense
EFARS	Engineer Federal Acquisition Regulation Supplement
EROC	Engineering Reporting Organization Code
FAR	Federal Acquisition Regulation
FOW	Feature of Work
FY	Fiscal Year
GIS	Geographic Information System
GM	Government Mode
GSA	General Services Administration
KO	Contract Officer
LD	Liquidated Damage
LIR	Line Item Review
NAICS	North American Industry Classification System
NAS	Network Analysis Schedule
NTP	Notice to Proceed
PD2	Procurement Desktop Defense
PDT	Project Delivery Team
PII	Personally Identifiable Information
POC	Point of Contact

QCR	QC Daily Report
RFI	Request for Information
RFP	Request for Proposal
RMS	Resident Management System
SBA	Small Business Administration
SCD	Substantial Completion Date
SCR	Special Contract Requirement
SDEF	Standard Data Exchange Format
UEI	Unique Entity Identifier
USACE	United States Army Corps of Engineers
UTC	Universal Time Coordinated
WBS	Work Breakdown Structure

## APPENDIX B – GENERAL INFORMATION

### B.1 Prohibited File Types in RMS

.exe	.msl	.cmd
.bat	.jar	.scr
.con	.jse	.asp
.com	.ps1	.js
.vbs	.sh	.exe
.cmo	.iso	

[Return to Section 2.4.1 Working with Document Packages](#)

## B.2 Field Information Overlay

The Field Information Overlay is a display of the table and field names associated with the view displayed at the time of access. This information will help users to determine what fields and which table is being used to assist with the creation of custom reports and queries.

To access the Field Information Overlay in any module, place the mouse in the module and press and hold the CTRL key on the keyboard then right click the mouse and release both the CTRL key and mouse button to display the information. The information will display the tables and the field names associated with the modules if any exist.

The screenshot displays the 'Milestone Schedule' Field Information Overlay. At the top, it says 'Close Field Information Overlay'. Below that, it shows 'Active Contract' with 'Award Duration' (PHASE.duration) and 'Current Duration' (PHASE.current\_duration) in days. There are seven buttons representing event categories: All Events (20), Design (5), Construction (6), Post Construction (9), System (13), District (7), and Contract (0). Below these buttons is the 'All Events' table with columns: event\_type, subgroup\_x, event\_ds, date\_org, date\_sch, scheduled\_event\_time, actual\_date\_act\_x, and status. A 'Data Source: EVENT' and 'RMS\_DATA TABLE=EVENT;FIELD=event\_type\_x' are also shown.

**Note:** Any field with underscore X (\_X) is a calculated field that is only accessible to the RMS Support Center.

If the full field name doesn't show, click on the paper stack icon to the right of the field name to copy the name to the clipboard which can be pasted to another program or to a custom query inside RMS to display or use the name.



Click this icon copy the field name to the clipboard.

## APPENDIX C – RESOLVING DATA INTEGRITY ACTION ITEMS

### C.1 Letter Needs Government Answer

Navigate to the [Correspondence](#) module.

Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>	<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>		<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>			
<b>Contract File</b> <i>Documents stored in Document Packages.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>	<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>	<b>Correspondence</b> <i>Create, edit, and view, Letters and Memos.</i>				
<b>Request for Information</b> <i>Respond to RFI's from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros for reporting.</i>	<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>		<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>			
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>	<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>		<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>			
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>	<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>		<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>			

Click on the [Received - All](#) blue sort tile and open the letter indicated in the action item by double clicking on it or single clicking and clicking on the [Edit](#) button.

Correspondence							
<b>Draft</b>		<b>Sent</b>		<b>Received</b>		<b>In-House Memos</b>	
All	0	All	1	All	2	All	0
Not Completed	0	Answer Required	0	Answer Required	0	Answer Required	0
Completed	0	Unresolved Issues	0	Unresolved Issues	0		
Approved	0						
Add Edit Delete <b>Correspondence Received-All</b> Search Export							
Drag a column header and drop it here to group by that column							
Dated	Letter No.	Brief Summary	Letter Status	Answer Due	Date Answered		
06/04/2024	H-0002	Letter language	Received	NA	NA		
06/04/2024	H-0001	This is a letter	Received	NA	NA		

Either click the [Create New Letter to Answer ...](#) button, or if an answer already exists, click on the [Select Existing Letter\(s\) to Answer ...](#) button and make a selection. For further instructions on Correspondence, see section [5.9 Correspondence](#) for more information.

**Correspondence - H-0002**

Letter Dated: 6/4/2024 Date Received: Select a date [15]

Unresolved Issue  Return for Correction

Requires Answer?

Letter Summary: Letter language

---

Letter No. H-0002 *CONTRACTOR: Complete a document package for this letter and submit it using this document package manager. The document package should include the letter itself and any applicable supporting documents.*

Add	Title of Package	Status	No.
Edit	Letter No. H-0002	In Review	1

**4**

Select Letter(s) Answered By H-0002 | **Create New Letter to Answer H-0002** | Select Existing Letter(s) to Answer H-0002

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Letters Answered by H-0002

Dated	Letter No.	Brief Summary
-------	------------	---------------

Letters Answering H-0002

Dated	Letter No.	Brief Summary
-------	------------	---------------

## C.2 Milestone Not Scheduled

Navigate to the *Milestone Schedule* module.

Administration	Finances	QA/QC	Submittals	<b>Schedules</b> <span style="color: red; font-size: 24px;">1</span>	Closeout	Import/Export	Contract Reports
Activity Schedule <small>View Activity Start and Finish dates and Summary of Schedule.</small>	<b>Milestone Schedule</b> <span style="color: red; font-size: 24px;">2</span> <small>Manage contract Scheduled and Actual event dates.</small>	Placement Schedule <small>Review and manage contract actual and projected placement values.</small>	Feature Schedule <small>View or manage Start &amp; Finish dates of Features of Work and Inspection dates.</small>				

Enter the scheduled date for the Milestone in question. For instructions on updating milestone schedule dates, please see the [section 9.2 Milestone Schedule in Volume 3](#) of the government manual.

**Milestone Schedule**

**Active Contract**

Award Duration: 0      Option Duration: 0      Current Duration: 0 days

All Events	Design	Construction	Post Construction	System	District	Contract
37	20	6	11	13	24	0

Add Edit Delete All Events Search X Export

Drag a column header and drop it here to group by that column

Group	Phase	Milestone Event	Original Date	Scheduled Date	Scheduled Time	Actual Date	Status
> System	Construction	Contract Required Completion	02/28/2022	02/28/2022		N/A	N/A
System	Construction	NTP Acknowledged		02/27/2022		02/28/2022	Completed
System	Construction	Contract Award		03/01/2022		03/02/2022	Completed
District	Design	Release of Claims Received		07/03/2022			Reschedule Needed
System	Construction	Red Zone Meeting					Not Scheduled
System	Post Construction	Project Fiscal Completion					Not Scheduled
System	Post Construction	Beneficial Occupancy Date					Not Scheduled
System	Post Construction	Contract Physical Completion					Not Scheduled

**3**

### C.3 Milestone Reschedule Needed

Administration	Finances	QA/QC	Submittals	Schedules <b>1</b>	Closeout	Import/Export	Contract Reports
Activity Schedule <i>View Activity Start and Finish dates and Summary of Schedule.</i>		Milestone Schedule <b>2</b> <i>Manage contract Scheduled and Actual event dates.</i>	Placement Schedule <i>Review and manage contract actual and projected placement values.</i>		Feature Schedule <i>View or manage Start &amp; Finish dates of Features of Work and Inspection dates.</i>		

Update the scheduled date for the Milestone in question. For instructions on updating milestone schedule dates, please see [section 9.2 Milestone Schedule in Volume 3](#) of the government manual.

Milestone Schedule							
Active Contract							
Award Duration		Option Duration		Current Duration			
0		0		0 days			
All Events	Design	Construction	Post Construction	System	District	Contract	
37	20	6	11	13	24	0	
Add Edit Delete All Events Search Export							
Group	Phase	Milestone Event	Original Date	Scheduled Date	Scheduled Time	Actual Date	Status
System	Construction	Contract Required Completion	02/28/2022	02/28/2022		N/A	N/A
System	Construction	NTP Acknowledged		02/27/2022		02/28/2022	Completed
System	Construction	Contract Award		03/01/2022		03/01/2022	Completed
District	Design	Release of Claims Received		07/03/2022			Reschedule Needed <b>3</b>
System	Construction	Red Zone Meeting					Not Scheduled
System	Post Construction	Project Fiscal Completion					Not Scheduled
System	Post Construction	Beneficial Occupancy Date					Not Scheduled
System	Post Construction	Contract Physical Completion					Not Scheduled

### C.4 Activity Final Follow Up Needed

Navigate to the [QA Daily Reports](#) module.

Administration	Finances	QA/QC <b>1</b>	Submittals	Schedules	Closeout	Import/Export	Contract Reports
QA Daily Reports <b>2</b> <i>Prepare and Review Daily QA Reports.</i>		QC Daily Reports <i>Prepare and Review Daily QC Reports.</i>	QA/QC Summary <i>A roll-up of each QA and QC Daily Report entry topic.</i>		Weather Delays <i>A monthly picture of Weather Delays and analysis of days to be added to contract.</i>		
Features of Work <i>Listing of Definable Features of Work to be used in the 3-Phase Inspection process.</i>		Three Phase Inspections <i>A tabulation of DFOW and the number of Checks linked to the 3-Phase Meetings.</i>		Hazard Analysis <i>Listing of each AHA that has been, or should be, prepared for each hazardous activity.</i>		QC Requirements <i>Entry screens for QC Tests, User Schools, Installed Property, and Transfer Property.</i>	
Equipment Checks <i>Listing of Equipment used, or anticipated to be used on the jobsite.</i>		Dredging Equipment <i>Listing of Dredging Equipment used, or anticipated to be used.</i>		Exposure Hours <i>Compilation of all contractor and subcontractor hours of work to comply with OSHA.</i>		QA Tests <i>Government QA Tests - Target 10% of Contractor QC Tests.</i>	
Required Verifications <i>Government Confirmation of selected QC Requirements.</i>		Planned Interviews <i>Targeted Labor Standard Interviews of Contractor Labor Force.</i>					

Open a draft QA Daily Report or create a new one, if needed.

All Daily QA Reports	Completed QA Reports	Not Completed QA Reports	Not Required		
913	755	115	43		
Add Edit Delete Multi-Sign Daily Reports Daily Reports Search Export					
Report No.	QA Report Date	QA Weather Reported	QA Report Status	QC Report Status	Contains Signed Documents
1,310	05/03/2023 Wednes	Weather Caused No Delay	Not Completed	Completed - Received by the Gov't	<input type="checkbox"/>

Navigate to the [QA Final Follow-Ups](#) submodule within the QA Daily Report.

**QA Daily Report No. 376, 06/26/2024 - Wednesday** QC Daily Report   QA Daily Report

<b>Weather</b>	Project: Ryans and Rupas Test Contract
Weather Not Entered	Contract Number: E100269999999
<b>QA Narratives</b>	Contractor: The Ranger Group, LLC
0 Written Today	QA Weather: Weather Not Entered
<b>Deficiencies</b>	QA narratives: No QA narratives entered today
0 Issued; 0 of 1 Verified Today	QA Deficiency: (Describe QA Deficiency items issued, verify QA Deficiency items reported corrected by contractor) No deficiency items issued/corrected today
<b>QA Tests</b>	To be implemented. To see data click the report button above.
0 Completed Today	
<b>QA Final Follow-Ups</b>	
0 of 1 Completed Today	
<b>Verify QC Requirements</b>	
0 of 5 Verified Today	
<b>Labor Interviews</b>	

Find the Activity in question and select the appropriate *Rating Code*.

**QA Daily Report No. 376 Dated 06/26/2024 Wednesday - QA Final Follow-Ups** Search   Export

Drag a column header and drop it here to group by that column

Final Follow-Up	Activity No.	Description	QA Rating of Contractor's QC	RatingCode
<input type="checkbox"/>	001	NTP Notice to Proceed		<div style="border: 1px solid red; padding: 5px;"> <ul style="list-style-type: none"> <li>O - Outstanding QC</li> <li>A - Above Average QC</li> <li>S - Satisfactory QC</li> <li>U - Unsatisfactory QC</li> <li>N - Not Applicable</li> </ul> </div>

For further instructions on QA Daily Reports recording Activity Final Follow-Up, see section [7.1.7 QA Final Follow-Ups in Volume 3](#) of the government manual.

### C.5 Issues/Remarks Out of Date

Navigate to the *Contract Status* module.

<b>1</b>	Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
	Contract Description <small>Enter award description and funding source. Contract location should be entered.</small>	Contract Status <small>Enter status/delay codes. Update Issues and Photo.</small>	Contract Personnel <small>Assign PDT and view User Roles.</small>	Contract Documents <small>Legacy Documents prior to Document Packages. Use Contract File for current documents.</small>	Contract File <small>Identify and send documents to PCF.</small>	Contract Setup <small>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</small>	P2 Projects <small>Link RMS Contract to P2 Project.</small>	Correspondence <small>Create, edit, and view, Letters and Memos.</small>
	Request for Information <small>Respond to RFI's from Contractor.</small>	Contract User Entries/Special Data <small>Insert data for District generated macros for reporting.</small>	Prime Contractor <small>Identify Contractor for payment purposes and view Contractor Staffing.</small>	Subcontractors <small>Identify Subcontractors, POC's, and Trades.</small>	Contractors Onsite <small>Enter dates that Subcontractors will be on-site.</small>	Contractor Insurance <small>Track General, Auto, and Workman's Comp Insurances.</small>	Contractor Payrolls <small>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</small>	Labor Interviews <small>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</small>
	Action Item Control <small>Control selection, severity and responsible parties for contract action items.</small>	Contract Notification Control <small>Control which notifications you will receive for this contract.</small>	Contractor Mode Record Locks <small>Lock selected records to prevent changes in Contractor Mode.</small>	Mobile Files <small>Organize files uploaded from linked mobile devices.</small>				

Navigate to the *Phase – Status / Issues* tab.

Contract Status			
Contract - Status Photos	Contract - Monthly Progress	Phase - Status / Issues	Field Staff Working Notes
<b>Status Photo</b>			

Update the *Remarks*, *Issues Customer*, *Issues USACE*, and *Issues/Remarks as of* fields.

**Contract Status**

Contract - Status Photos    Contract - Monthly Progress    Phase - Status / Issues    Field Staff Working Notes

**Contract E100269999999 - (Single phase)**

Issues

Contract Status: <Not Set>    Primary Delay Code: <Not Set>

Remarks:     Issues/Remarks as of: 1/2/2023

Issues Customer:

Issues USACE:

4

Cost / Time Growth																							
Current Contract Including Completed Mods (Code 6)				Approved Contract Including Approved Changes (Code 5)				Proposed Contract Including Proposed Changes (Code 4)															
Base Award	\$1,000.00	30 days		Current Contract	\$1,000.00	30 days		Approved Contract	\$1,000.00	30 days		Options/Definitizations	\$0.00	0 days		Options/Definitizations	\$0.00	0 days		Options/Definitizations	\$0.00	0 days	
Original Contract	\$1,000.00	30 days		Orig Approved Contract	\$1,000.00	30 days		Orig Proposed Contract	\$1,000.00	30 days		Controllable Mods	\$0.00	0 days		Controllable Mods	\$0.00	0 days		Controllable Mods	\$0.00	0 days	
Controllable Mods	\$0.00	0 days		Uncontrollable Mods	\$0.00	0 days		Uncontrollable Mods	\$0.00	0 days		Uncontrollable Mods	\$0.00	0 days		Uncontrollable Mods	\$0.00	0 days		Uncontrollable Mods	\$0.00	0 days	
Current Contract	\$1,000.00	30 days		Approved Contract	\$1,000.00	30 days		Proposed Contract	\$1,000.00	30 days													
Controllable Growth		Total Growth		Controllable Growth		Total Growth		Controllable Growth		Total Growth													
% Cost	% Time	% Cost	% Time	% Cost	% Time	% Cost	% Time	% Cost	% Time	% Cost	% Time												
0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%												
Original Required Completion 06/13/2028				Approved Required Completion 06/13/2028				Proposed Required Completion 06/13/2028															
Current Required Completion 06/13/2028																							

For further instructions, see section [5.3 Contract Status](#) and section [5.3.3 Phase Status/Issues](#).

## C.6 Prime Contractor Full Name Not Entered

Navigate to the *Prime Contractor* module.

1 Administration	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>Contract Description</b> <i>Enter award description and funding sources. Contract location should be entered.</i>	<b>Contract Status</b> <i>Enter status/delay codes. Update Issues and Photo.</i>	<b>Contract Personnel</b> <i>Assign PDT and view User Roles.</i>	<b>Contract Documents</b> <i>Legacy Documents prior to Document Packages. Use Contract File for current documents.</i>				
<b>Contract File</b> <i>Identify and send documents to PCF.</i>	<b>Contract Setup</b> <i>Determine how contract is to be managed by QA and QC staff. Setup submittal register.</i>	<b>P2 Projects</b> <i>Link RMS Contract to P2 Project.</i>	<b>Correspondence</b> <i>Create, edit, and view Letters and Memos.</i>				
<b>Request for Information</b> <i>Respond to RFIs from Contractor.</i>	<b>Contract User Entries/Special Data</b> <i>Insert data for District generated macros reporting.</i>	<b>Prime Contractor</b> <i>Identify Contractor for payment purposes and view Contractor Staffing.</i>	<b>Subcontractors</b> <i>Identify Subcontractors, POC's, and Trades.</i>				
<b>Contractors Onsite</b> <i>Enter dates that Subcontractors will be on-site.</i>	<b>Contractor Insurance</b> <i>Track General, Auto, and Workman's Comp Insurances.</i>	<b>Contractor Payrolls</b> <i>Enter or Review Contractor Payrolls for Department of Labor reporting purposes.</i>	<b>Labor Interviews</b> <i>Conduct Labor Standard Interviews for Davis-Bacon Compliance.</i>				
<b>Action Item Control</b> <i>Control selection, severity and responsible parties for contract action items.</i>	<b>Contract Notification Control</b> <i>Control which notifications you will receive for this contract.</i>	<b>Contractor Mode Record Locks</b> <i>Lock selected records to prevent changes in Contractor Mode.</i>	<b>Mobile Files</b> <i>Organize files uploaded from linked mobile devices.</i>				

Enter the correct information into the *Contractor Full Name* field.

For further instruction on Prime Contractor, see section [5.12 Prime Contractor](#).

### C.7 QA Daily Report not Complete

Navigate to the *QA Daily Reports* module.

Administration	Finances	<b>1</b> QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
<b>2</b> QA Daily Reports <i>Prepare and Review Daily QA Reports.</i>	QC Daily Reports <i>Prepare and Review Daily QC Reports.</i>	QA/QC Summary <i>A roll-up of each QA and QC Daily Report entry topic.</i>	Weather Delays <i>A monthly picture of Weather Delays and analysis of days to be added to contract.</i>	Features of Work <i>Listing of Definable Features of Work to be used in the 3-Phase Inspection process.</i>	Three Phase Inspections <i>A tabulation of DFOW and the number of Checks linked to the 3-Phase Meetings.</i>	Hazard Analysis <i>Listing of each AHA that has been, or should be, prepared for each hazardous activity.</i>	QC Requirements <i>Entry screens for QC Tests: User Schools, Installed Property, and Transfer Property.</i>
Equipment Checks <i>Listing of Equipment used, or anticipated to be used on the jobsite.</i>	Dredging Equipment <i>Listing of Dredging Equipment used, or anticipated to be used.</i>	Exposure Hours <i>Compilation of all contractor and subcontractor hours of work to comply with OSHA.</i>	QA Tests <i>Government QA Tests - Target 10% of Contractor QC Tests.</i>	Required Verifications <i>Government Confirmation of selected QC Requirements.</i>	Planned Interviews <i>Targeted Labor Standard Interviews of Contractor Labor Force.</i>		

Open the report in question.

All Daily QA Reports	Completed QA Reports	Not Completed QA Reports	Not Required
913	755	115	43

Report No.	QA Report Date	QA Weather Reported	QA Report Status	QC Report Status	Contains Signed Documents
1,952	02/03/2025 Monday	Weather Not Entered	Not Completed		<input type="checkbox"/>
<b>3</b> 1,791	08/26/2024 Monday	Weather Caused No Delay	Not Completed		<input type="checkbox"/>

**Ensure all data/documents have been entered/uploaded before proceeding.**

Check the *Generate QA Report in Document Package* checkbox.

**QA Daily Report No. 1952, 02/03/2025 - Monday** QA Daily Report

**Weather**

Weather Not Entered

**QA Narratives**

2 Written Today

**Deficiencies**

0 Issued; 0 of 21 Verified Today

**QA Tests**

0 Completed Today

**QA Final Follow-Ups**

0 of 1 Completed Today

**Verify QC Requirements**

0 of 4 Verified Today

**Labor Interviews**

0 Held Today

**Mishap Reporting**

0 Mishaps Today

**Barrier Construction Reporting**

Project: Wideband Satellite Communications Center  
Contract Number: 12345  
Contractor: AISOW Technologies Corporation

---

QA Weather: Weather Not Entered

---

Portion of Scheduled Day Suitable for Operations

Structural Excavation	Borrow Excavation	Embankment	Concrete	Sturcture
0 %	0 %	0 %	0 %	0 %

Has anything developed on the work which might lead to a change order or finding of fact?

NO  YES

---

Number of Government Employees

Supervisory	Office	Layout	Inspection	Total	Labor
0	0	0	0	0	0

Number of Contractor's Employees

Supervisory	Skilled	Laborers	Total
0	0	0	0

Number of Shifts: 3

From	To	From	To	From	To

QA Daily Report No. 1952 COE: Complete a document package for this QA daily report and submit it using this document package manager.

Complete	Add	Signed	Title of Package	Status	No.
<input type="button" value="Complete"/>	<input type="button" value="Add"/>	<input type="button" value="Signed"/>	QA Daily Report No. 1952	Not Ready	1
<input type="button" value="Edit"/>	<input type="button" value="Delete"/>				

Generate QA Report in Document Package

4

Not Required

Contract File Status: Government QA Report

Contract File Status: Contractor QC Reports

Once the process has completed, open the Document Package, and sign the QA Daily report and any other documents requiring signatures. Click [Complete Package](#) to complete the Document Package.

**Document Package: QA Daily Report No. 1952 - Report Date: 02/03/2025**

All Attachments 1	PDF Documents 1	Word Documents 0	Excel Files 0	Powerpoint Files 0	Drag and Drop Attachment Files Here	Generate Letter
	JPEG/JPG Images 0	Text Files 0	CSV Files 0	Email 0		Sign Selected Documents

**All Attachments**

Primary	Date of the Document	Document Title	Contractor Signature Status	Government Signature Status
<input checked="" type="checkbox"/>	5/5/2025 3:08:36 PM	QA Daily Report No. 1952 - QaDailyReport.PDF	Not Signed	Not Signed

Any attachments that are CUI uploaded to the RMS application should include CUI markings. Attachments may be used in the management of contracts and will be stored in USACE databases. When CUI marked documents are printed or downloaded and disseminated CUI handling requirements should be followed. If needed, a CUI cover sheet is available in the RMS Admin report area.

**Individual File Information**

Date of the Document: 5/5/2025  
 Signed By: \_\_\_\_\_  
 Document Title: QA Daily Report No. 1952 - QaDailyReport.PDF  
 Description: \_\_\_\_\_

Manually signed by Contractor  
 Manually signed by Government

**Document Package**

GOVERNMENT: Attach documents, sign as appropriate and then complete this document package.

Government Review Notes: \_\_\_\_\_

**6** Complete Package

For further instructions on QA Daily Reports, see section [7.1 QA Daily Reports and the following subsections in Volume 3](#) of the government manual.

### C.8 QC Requirement Needs QA Review

Navigate to the [QA Daily Reports](#) module.

Administration	Finances	1 QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
		<b>2</b> QA Daily Reports <i>Prepare and Review Daily QA Reports.</i>	QC Daily Reports <i>Prepare and Review Daily QC Reports.</i>	QA/QC Summary <i>A roll-up of each QA and QC Daily Report entry topic.</i>	Weather Delays <i>A monthly picture of Weather Delays and analysis of days to be added to contract.</i>		
		Features of Work <i>Listing of Definable Features of Work to be used in the 3-Phase Inspection process.</i>	Three Phase Inspections <i>A tabulation of DFW and the number of Checks linked to the 3-Phase Meetings.</i>	Hazard Analysis <i>Listing of each AHA that has been, or should be, prepared for each hazardous activity.</i>	QC Requirements <i>Entry screens for QC Tests, User Schools, Installed Property, and Transfer Property.</i>		
		Equipment Checks <i>Listing of Equipment used, or anticipated to be used on the jobsite.</i>	Dredging Equipment <i>Listing of Dredging Equipment used, or anticipated to be used.</i>	Exposure Hours <i>Compilation of all contractor and subcontractor hours of work to comply with OSHA.</i>	QA Tests <i>Government QA Tests - Target 10% of Contractor QC Tests.</i>		
		Required Verifications <i>Government Confirmation of selected QC Requirements.</i>	Planned Interviews <i>Targeted Labor Standard Interviews of Contractor Labor Force.</i>				

Open a draft daily report or create a new one, if needed.

The screenshot shows a dashboard with four summary cards: All Daily QA Reports (913), Completed QA Reports (755), Not Completed QA Reports (115), and Not Required (43). Below the cards is a toolbar with 'Add', 'Edit', and 'Delete' buttons, and a 'Multi-Sign Daily Reports' button. A search bar and an 'Export' button are also present. A table below the toolbar has columns for Report No., QA Report Date, QA Weather Reported, QA Report Status, QC Report Status, and Contains Signed Documents. The first row is highlighted with a red box and contains the following data: Report No. 1,310, QA Report Date 05/03/2023, QA Weather Reported Wednes, QA Report Status Weather Caused No Delay, QC Report Status Not Completed, and Contains Signed Documents Completed - Received by the Gov't.

Click on the [Verify QC Requirements](#) submodule.

The screenshot shows the 'QA Daily Report No. 475, 09/01/2023 - Friday' submodule. On the left is a sidebar with sections: Weather (Weather Caused No Delay), QA Narratives (1 Written Today), Deficiencies (0 Issued; 0 of 1 Verified Today), QA Tests (0 Completed Today), QA Final Follow-Ups (0 of 0 Completed Today), **Verify QC Requirements** (4 of 10 Verified Today), and Labor Interviews. The main content area shows project details (Project: Ryans and Rupas Test Contract, Contract Number: E100269999999, Contractor: The Ranger Group, LLC), QA Weather (Weather Caused No Delay, Temperature Min 0 °F, Max 0 °F, No Precipitation, No Wind), QA narratives (Site Safety: 1,376 cubic yards material received., Rupa Rukum: 100% Rain Day for embankment placement will be claimed by the contractor., Unresolved: No), and a QA Deficiency section (No deficiency items issued/corrected today). The 'Verify QC Requirements' button in the sidebar is highlighted with a red box and a red circle with the number 4.

Find the QC requirement in question and check the [Concur](#) or [Reissue](#) checkbox, whichever one is applicable.

The screenshot shows the 'QC Requirements - QA Daily Report No. 475, 09/01/2023 - Friday' submodule. At the top are five summary cards: All QC Requirements (10), QC Tests (6), User Schools (2), Installed Property (1), and Transfer Property (1). Below the cards is a toolbar with 'Add', 'Edit', and 'Delete' buttons, and a search bar and an 'Export' button. A table below the toolbar has columns for QA Date, QC Requirement, Description, Concur, and Reissue. The first three rows of the table are highlighted with a red box, and the 'Reissue' checkbox in the second row is highlighted with a red circle and the number 5.

QA Date	QC Requirement	Description	Concur	Reissue
>	CT-00001		<input type="checkbox"/>	<input type="checkbox"/>
	CT-00002		<input type="checkbox"/>	<input type="checkbox"/>
	CT-00003		<input type="checkbox"/>	<input type="checkbox"/>

Complete the QA Daily Report, as needed. For further instructions on verifying QC Requirements, see section [7.1.8 Verifying QC Requirements in Volume 3](#) of the government manual.

## C.9 RFI Requires Answer

Navigate to the *Request for Information* module.

<b>1</b>	<b>Administration</b>	Finances	QA/QC	Submittals	Schedules	Closeout	Import/Export	Contract Reports
	<b>Contract Description</b> Enter award description and funding sources. Contract location should be entered.	<b>Contract Status</b> Enter status/delay codes. Update Issues and Photo.	<b>Contract Personnel</b> Assign PDT and view User Roles.		<b>Contract Documents</b> Legacy Documents prior to Document Packages. Use Contract File for current documents.			
	<b>Contract File</b> Identify and send documents to PCF.	<b>Contract Setup</b> Determine how contract is to be managed by QA and QC staff. Setup submittal register.	<b>P2 Projects</b> Link RMS Contract to P2 Project.		<b>Correspondence</b> Create, edit, and view Letters and Memos.			
<b>2</b>	<b>Request for Information</b> Respond to RFI's from Contractor.	<b>Contract User Entries/Special Data</b> Insert data for District generated macros for reporting.	<b>Prime Contractor</b> Identify Contractor for payment purposes and view Contractor Staffing.		<b>Subcontractors</b> Identify Subcontractors, POC's, and Trades.			
	<b>Contractors Onsite</b> Enter dates that Subcontractors will be on-site.	<b>Contractor Insurance</b> Track General, Auto, and Workman's Comp Insurances.	<b>Contractor Payrolls</b> Enter or Review Contractor Payrolls for Department of Labor reporting purposes.		<b>Labor Interviews</b> Conduct Labor Standard Interviews for Davis-Bacon Compliance.			
	<b>Action Item Control</b> Control selection, severity and responsible parties for contract action items.	<b>Contract Notification Control</b> Control which notifications you will receive for this contract.	<b>Contractor Mode Record Locks</b> Lock selected records to prevent changes in Contractor Mode.		<b>Mobile Files</b> Organize files uploaded from linked mobile devices.			

Navigate to the *RFI's not received* tile.

All RFI's 5	<b>3</b> RFI's not received 2	Outstanding RFI's 0	Complete RFI's 3
----------------	-------------------------------------	------------------------	---------------------

Add Edit Delete All RFIs Search X Export

Drag a column header and drop it here to group by that column

Date Requested	RFI No.	RFI Subject	Date Received	Date Answered	COR/ACO Approved
03/02/2022	RFI-0001	Training	03/02/2022	03/02/2022	<input checked="" type="checkbox"/>
05/31/2024	RFI-0002	Testing RFI	06/05/2024	06/05/2024	<input checked="" type="checkbox"/>
06/06/2024	RFI-0003	Request for Information	06/06/2024	06/06/2024	<input checked="" type="checkbox"/>
06/07/2024	RFI-0004G				<input type="checkbox"/>
06/26/2024	RFI-0010	Request Subject			<input type="checkbox"/>

Select the RFI that needs to be answered.

All RFI's 5	RFI's not received 2	Outstanding RFI's 0	Complete RFI's 3
----------------	-------------------------	------------------------	---------------------

Add Edit Delete RFI's not received Search X Export

Drag a column header and drop it here to group by that column

Date Requested	RFI No.	RFI Subject	Date Received	Date Answered	COR/ACO Approved
06/07/2024	RFI-0004G				<input type="checkbox"/>
06/26/2024	RFI-0010	Request Subject			<input type="checkbox"/>

Examine the RFI, then navigate to the Government Response tab to work the response. See section [5.10.3 Editing a GRFI / Responding to a Contractor RFI](#) for guidance on completing a response to a Contractor RFI.

**Request For Information - RFI No. RFI-0010** RFI Form

Contractor RFI **Government Response** 5

**Government Response**

Return to Contractor for Corrections

Date Received   Answered    Answer Completed

Received by   Modification Required  COR / ACO Approved

Answer Prepared By

Govt Response

RFI Secondary Reviewers

Staff Name

Secondary Respondent  Secondary Response Due   Secondary Response Completed

Secondary Respondent Response

RFI-0010 Response *Shared: Prepare a document package for this RFI response and complete it using this document package manager. The document package should include the RFI response and any applicable supporting documents.*

Add	Title of Package	Status	No.

RFI-0010 Gov't Only *GOVERNMENT: Complete a document package for Government-only RFI Response using this document package manager. The document package contents will not be visible to the Contractor.*

Add	Title of Package	Status	No.

### C.10 Submittal Review Due

Navigate to the [Transmittal Log](#) module.

Administration	Finances	QA/QC	1 Submittals	Schedules	Closeout	Import/Export	Contract Reports
Specification Sections <i>List of Specification Sections required for this contract.</i>	Submittal Register <i>Required Submittal items to be provided to Contractor.</i>	2 <b>Transmittal Log</b> <i>Record of Submittal items transmitted for Government review or information.</i>		Submittal Assignments <i>Assign reviewer, review period and activities to submittal items.</i>			

Navigate to the [Pending Government Receipt](#) tile and enter a date in the [Date Received](#) field.

**Transmittal Log**

Register 01-Main Register	3 Pending Government Receipt	Transmittals in Review	Pending Contractor Acknowledgement	Completed Transmittals
Click to select another Register	1	2	1	0

Delete Search X Export

Drag a column header and drop it here to group by that column

Section	Transmittal Number	Submittal Items included on Transmittal	Contractor Prepared	Contractor Sent	Date Received	Classification
11111	11111-3	56	06/26/2024	06/26/2024	<input type="text" value="Enter date"/>	GA

June - 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
22	26	27	28	29	30	1
23	2	3	4	5	6	7
24	9	10	11	12	13	14
25	16	17	18	19	20	21
26	23	24	25	26	27	28
27	30	1	2	3	4	5

4

Navigate to the [Transmittals in Review](#) tile and select the transmittal to be worked.

Section	Transmittal Number	Submittal Items included on Transmittal	Contractor Sent	Government Received	Review Due	Date Returned to Contractor	Classification
11111	11111-1	22	07/18/2022	07/30/2022	08/29/2022		GA
11111	11111-2.1	55	06/26/2024	06/26/2024	07/26/2024		GA
11111	11111-3	56	06/26/2024	06/26/2024	07/26/2024		GA

Review the submittals included in the transmittal and fill out the fields, as needed. See section [8.3.1 Government Review Process](#) in Volume 3 of this manual for guidance on how to complete a transmittal.

**Transmittal 11111-3 - in Review**

Date Prepared: 6/26/2024 | Date Received: 6/26/2024 | Review Due: 7/26/2024

Received By: [Redacted] | Date Sent to Contractor: Select a date

Item	Description	Primary Reviewer	No. of Copies	Classification	QC Code	Variation	QA Code	Attachment
56			6	GA	A	<input type="checkbox"/>		0 Attachments: N/A

Paragraph: [Redacted] | Drawing: [Redacted]

**Contractor / Government Remarks** | Secondary Reviewer Remarks

Contractor Remarks to Government: [Redacted]

Government Remarks to Contractor: [Redacted]

**Government - Apply QA Codes and Complete Transmittal**

To complete and submit the Transmittal, click to create and sign a 4025; or, click to manually attach a signed copy. Ensure all files are added before completing.

Include digital signature title

Apply QA Codes and Complete 4025 | Manually Attach Signed 4025

Transmittal 11111-3 | Shared Package: Complete a document package for the transmittal package and submit it using this document package manager. The document package should include the signed 4025 and all supporting documents.

Title of Package	Status	No.

Transmittal 11111-3 | Government: Complete a document package for the transmittal package and submit it using this document package manager.

Title of Package	Status	No.

Return to section [Action Item Control](#).