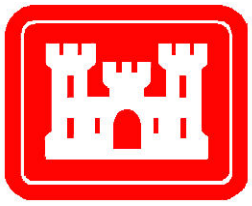

US Army Corps
of Engineers ®

RESIDENT MANAGEMENT SYSTEM
USER MANUAL
Government Manual Vol 3

RMS 3.0
Version 5.0

US Army Corps of Engineers

RMS Center

Kansas City, Kansas, USA

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7.0 QA/QC

In this section, guidance will be provided on how to enter and manage the data for the Government Quality Assurance (QA) aspects of a contract. This module is where the Government enters data to substantiate the of quality workmanship throughout the life of the contract. It is essential that the Quality Assurance/Quality Control module be properly maintained to ensure all phases of the contract are maintained in the highest standards in accordance with regulations and the terms of the contract.

Obtaining quality construction is a combined responsibility of the construction Contractor and the Government. The mutual goal must be a quality product and strict adherence to the contract requirements. A cooperative and professional working relationship should be established to realize this common goal. All contract documents should establish the quality required in a project to be constructed.

Quality Assurance is required on all construction contracts. The extent of assurance shall be commensurate with the value and complexity of the contracts involved and the requirements of this regulation.

Quality assurance is the process by which the Government assures product delivery expectations are met. This process starts well before construction and includes reviews of the plans and specifications for biddability, constructability, operability, environmental responsibility, plan-in-hand site reviews, coordination with using agencies or local interests, establishment of performance periods and quality control requirements, field office planning, preparation of QA plans, reviews of quality control plans, enforcement of contract clauses, maintenance of quality assurance and quality control inspection and work records, and acceptance of completed construction.

RMS application assists in accomplishing numerous tasks by providing a comprehensive and systematic means to enter, record and retrieve contract data. The QA/QC modules available in RMS are listed below:

QA Daily Reports: Where the Government enters the daily report documenting the day's events and activities.

QC Daily Reports: This module is where the Contractor writes daily reports documenting the day's events and activities.

QA/QC Summary: A graphical representation of the status of the various QA/QC elements with a point and click interface for accessing a list view of the selected item.

Weather Delays: This module presents the weather delays for the month at a glance

Features of Work: Where the Contractor lists all the features of work needed to complete the work.

Three Phase Inspections: Where the Contractor develops a list of common deficiencies to watch for with each feature of work.

Hazard Analysis: Use this module to log and track Activity Hazard

QC Requirements: Use this module to log and track contract requirements, user schools, installed property, and transfer property.

Equipment Checks: Use this module to log and track inspection dates and usage of equipment on site.

Dredging Equipment: On contracts which include dredging, use this selection to log and track dredging equipment.

Exposure Hours: This module is where the Contractor records and submits monthly exposure hours.

QA Tests: Use this module to enter the tests to be performed by, or on behalf of, the Government.

Required Verfications: Use this module to view and verify QC Requirements that require Government verfication.

Planned Interviews: Use this module to enter the Labor Interviews planned for the prime and each subcontractor.

Monitoring the contract progress is a responsibility of both the Government and the Contractor. As a contract progresses, both the Contractor and the Government provide daily reports as on progress made. These reports include activities started/completed, inspections performed, QC requirements met, problems experienced and, if any, accidents were encountered, as well as a variety of other information. The Quality Assurance option provides a place to enter all of this information pertaining to the Government.

Some Contractor information is required to have a complete Government Daily QA Report. For example, the Contractor must report an activity completed prior to the Government recording a rating on the efforts of the quality control for that activity. This information can be entered manually from written reports or electronically from the Contractor mode of RMS (in the QC-RMS).

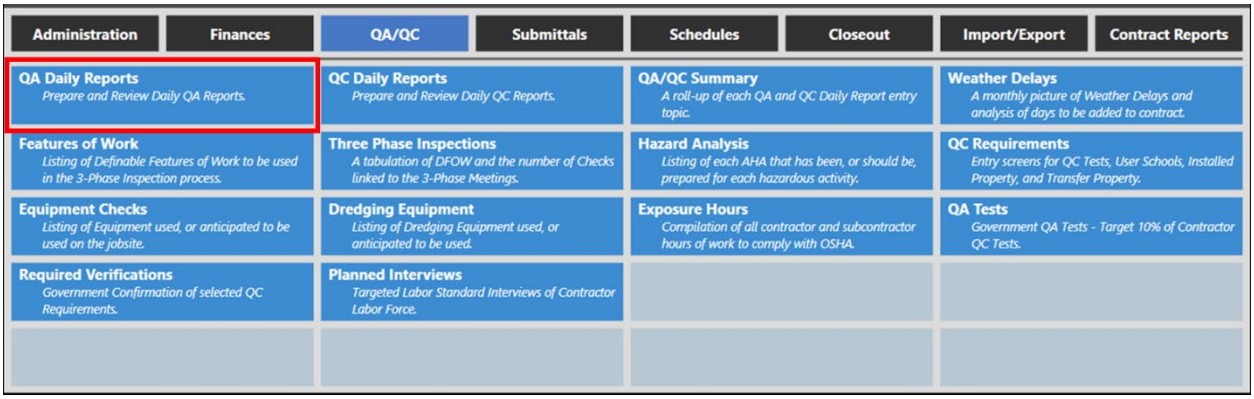
Planning is required before the Government or a Contractor can adequately prepare the Daily Reports. The Government, or the Designer accomplishes some of the planning, long before the contract exists. This includes what RMS refers to as QC Requirements as was discussed in detail in the previous section.

The daily quality assurance reports are a vital tool in documenting the contract development and progress. The QA Report menu option provides a means to enter all of this information pertaining to the Government required data entry.

At many sites, the Government representative will enter the data directly into RMS at the end of each day. At other sites, it may be more efficient for the representative to write a report that will be entered into the system at a later date and time. In either scenario RMS is capable of handling the task.

Although the Government data is entered in the QA Report menu option and the Contractor data is entered in the QC Report menu option, much of the data is interdependent. For example, a QC requirement such as a QC test must be reported as completed in the QC Report, QC Tests option before it can be verified in the QA Report, Verify QC Requirements option.

7.1 QA Daily Reports

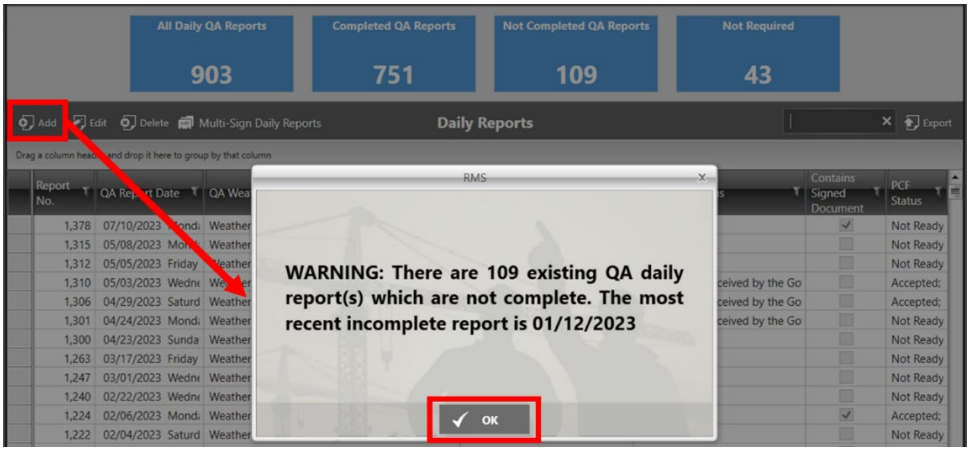


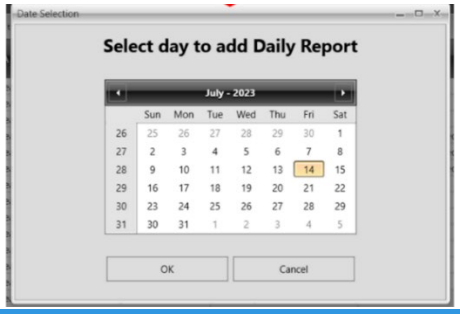
QA Daily Reports are an extremely important tool in assisting the Government to assure the quality requirements of the contract are being satisfied.

7.1.1 Adding a QA Daily Report

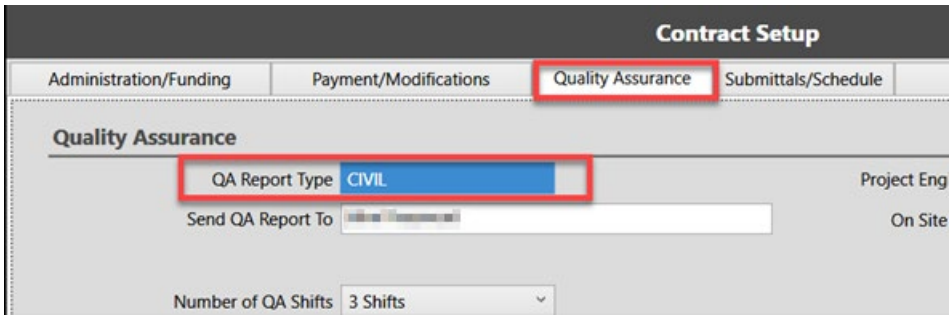
Adding a QA (Government mode) daily report involves opening a contract, then navigate to ***QA/QC | QA Daily Reports***. Next, click on the *Add* button (as shown below).

When clicking on the *Add* button, the first thing that may pop up is a notice showing how many incomplete Daily Reports exist (and if the previous report has not been completed). Clicking *OK* on this window will bring the user to a calendar to choose a date for the QA Daily Report.





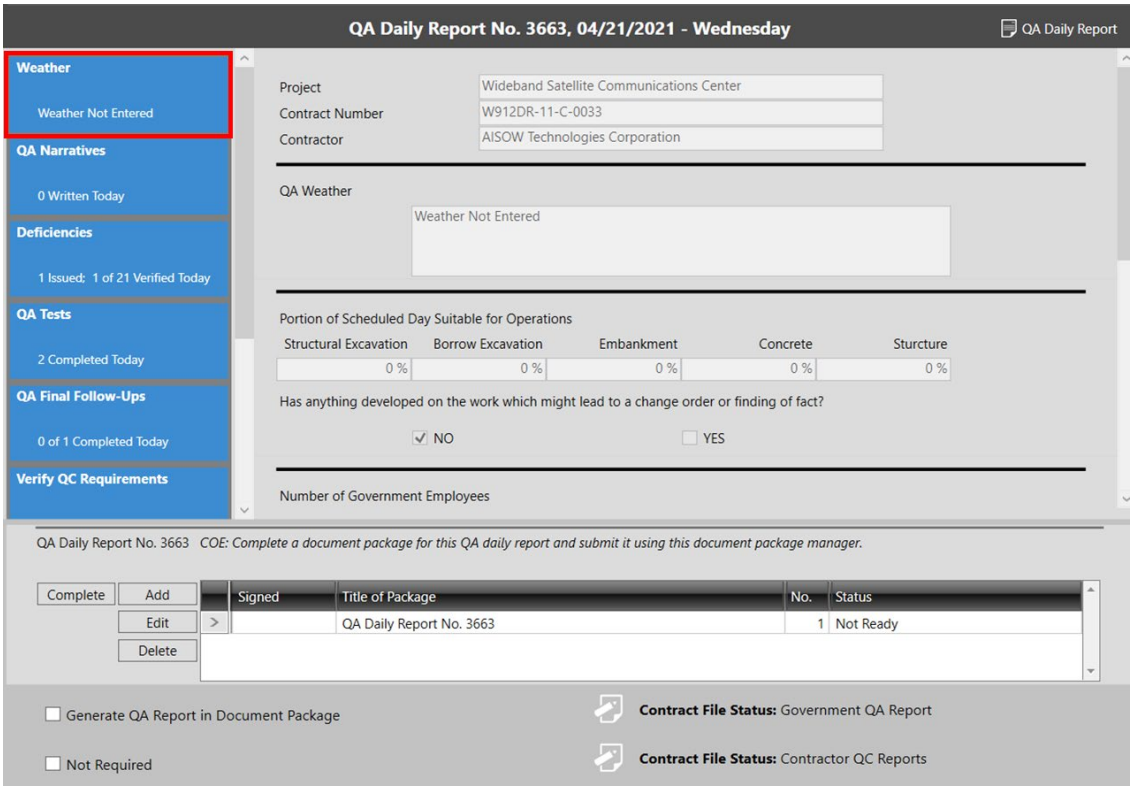
There are two different types of Daily Reports – Military and Civil reports. These will change the way the weather tab data entry looks. The daily report type is set in the ***Contract Setup | Quality Assurance*** tab then choose the QA Report Type.



Enter the Weather to begin the report.

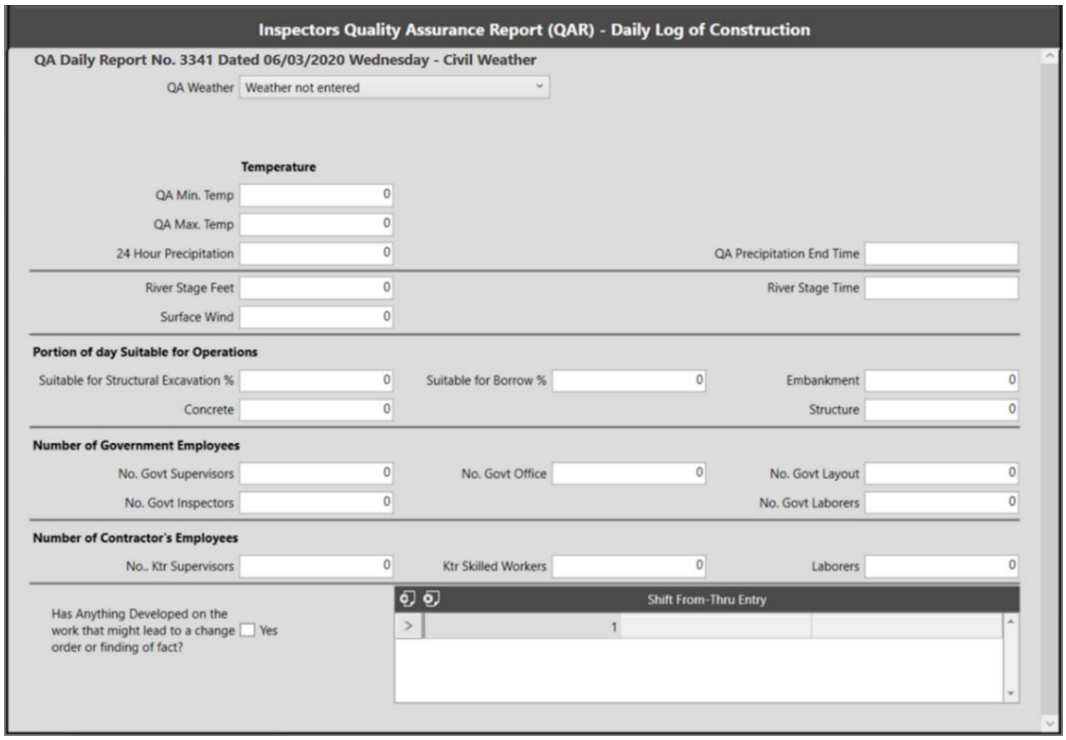
> *Note:* When a new Daily Report is started, a Document Package will automatically be created. Add supporting documents as needed throughout the process of completing the report. The completed Daily Report will be added to this Document Package once the report is completed.

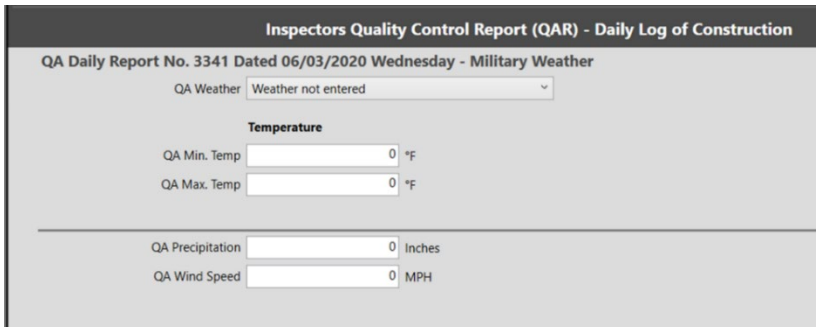
To enter the weather for a report, click on the *Weather* tile on the upper left-hand side of the *QA Daily Report* (see below):



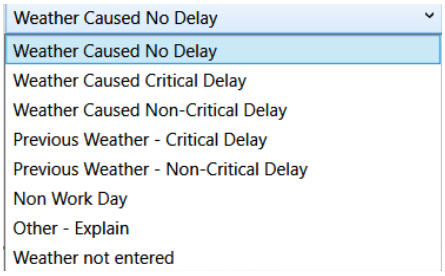
The type of QA report set in *Contract Setup*, will determine which Weather Edit view will be displayed.

A Civil QA Daily Report's Weather Edit view is shown in the figure below.





A Military QA Daily Report's Weather Edit view is shown in the figure to the left.



To set the weather for the report, click on the *QA Weather* dropdown menu and select the appropriate description, as seen in the figure on the right.

Record the minimum and maximum temperatures for the shift worked and the amount, if any, of precipitation and wind that occurred.

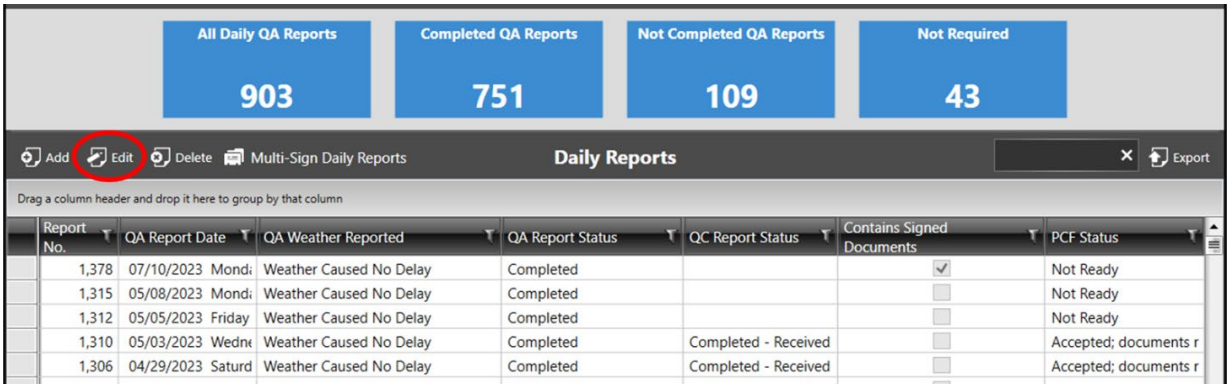
The QA Representative records opinion(s) as to the portion of day that is suitable for operations occurring on the job site, in the listed categories. The value entered is a percentage of the shift. For example, if only half the day was suitable for concrete work, then 50% would be entered in that block.

Vertical construction projects (e.g., Military type contracts) are usually more susceptible to wind than is a land-based civil works project. That is why wind is not a specific category, as was on the Military report. In addition, depending on the type of civil works project, such as a dredging project, rain may not be a factor. A careful determination should be made to adequately compensate the Contractor for time extensions due to adverse weather conditions. The Civil report also tracks and verifies both Contractor and Government manpower at the job site.

If something developed that might lead to a change order or finding of fact (for example changed conditions encountered) a check mark should be placed in the Yes block. However, it is also customary to enter a Narrative in the report and fully explain such development.

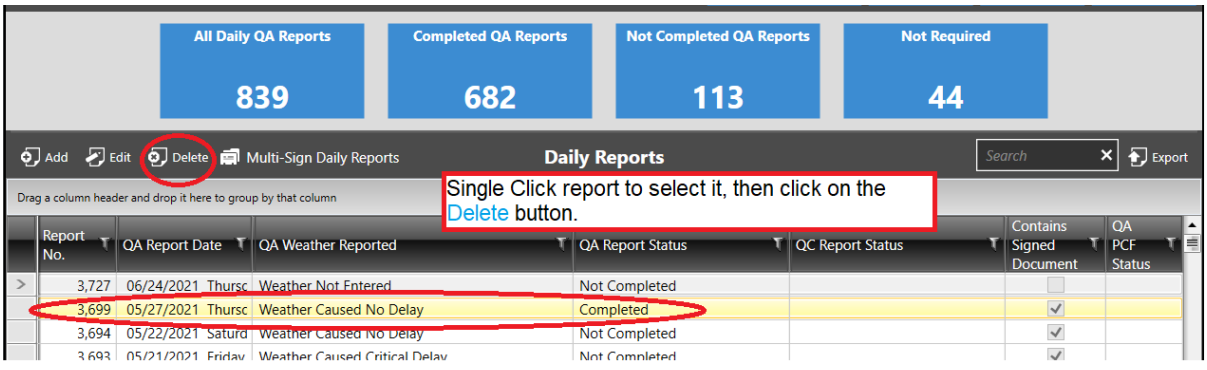
Note: Weather can, and often does, adversely affect construction progress. Time extensions should be granted for adverse days that are over and above those anticipated within the contract. Consequently, it is critical that the Government complete this section accurately and impartially. RMS uses the information within this section to calculate any weather delay days due to the Contractor. (RMS does not use the similar data from the QC Report that the Contractor may report.) This calculation is based on the weather days allotted in the contract and that may be exceeded by extended weather condition.

7.1.2 Editing a QA Daily Report



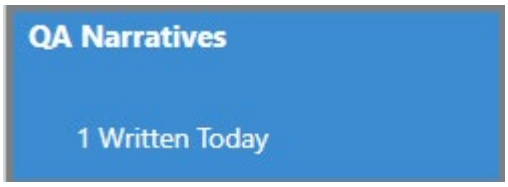
In the main view of the ***QA Daily Reports*** module, single click the item to edit and then click the *Edit* button or double click on the item that needs to be edited. All areas that are not greyed out can be edited in the edit view that displays. Click the *Back* button to save the information.

7.1.3 Deleting a QA Daily Report



To Delete, single click on the item to delete and click on the *Delete* button, then confirm deletion.

7.1.4 QA Narratives

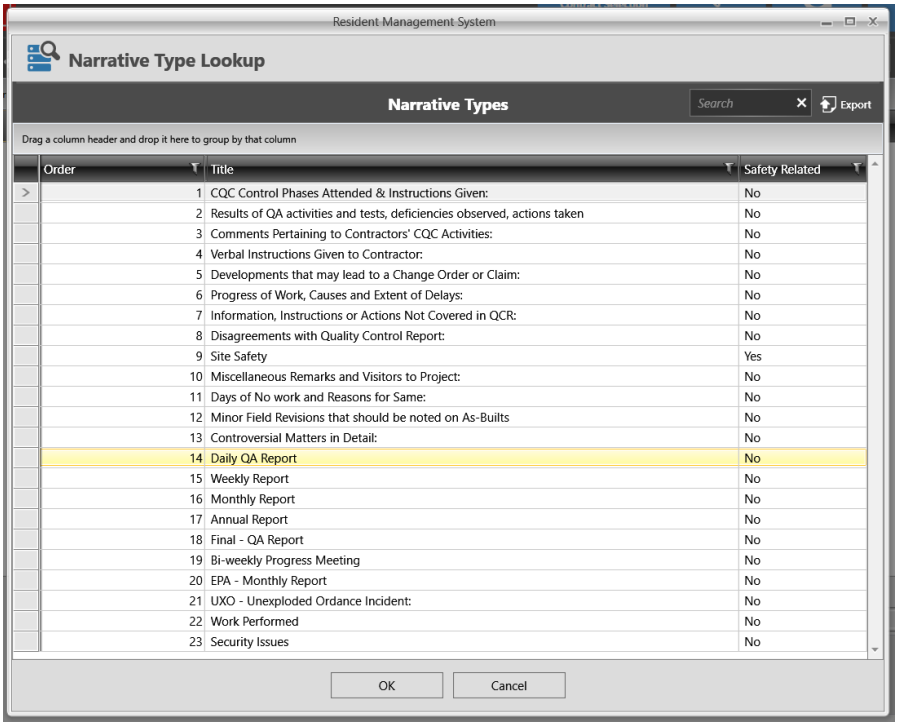


The QA Narrative provides the Government with a wide variety of topics to record the days' activities. When a narrative is added, a Lookup is provided with several topics to choose. These topics are the headings that are printed on the report for each narrative or group of narratives.

A *Narrative* is a paragraph or *Edit Memo* field used to describe conditions and/or elements related to that day's work. RMS can accept an unlimited number of narratives for a particular day. The paragraphs may contain observations and comments, such as: verbal instructions to the Contractor, controversial matters, disagreements with the Contractor, and so forth.

When adding a QA Narrative, the user is presented with the option of manually adding a QA Narrative or copying narratives from a previous daily report.

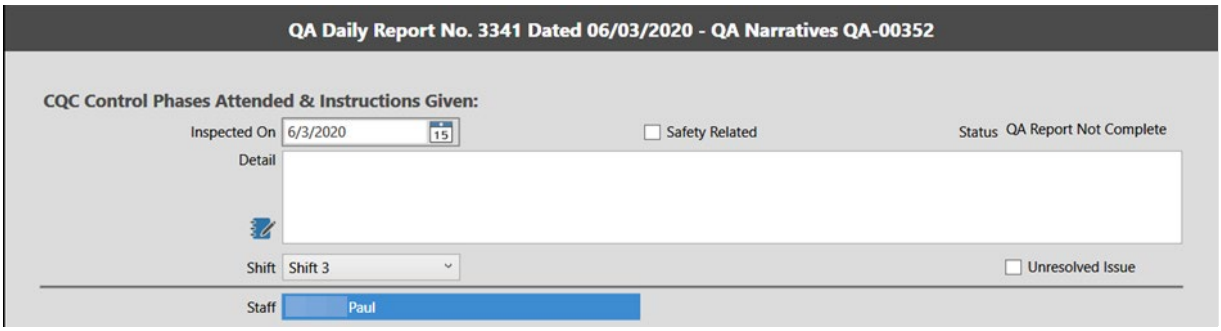
Manually adding a QA Narrative by clicking on the *Add* button will prompt the user to select the Narrative Type:



To edit a Narrative, make a selection and click on the *Edit* button. To delete a Narrative, make a selection and click on the *Delete* button, then follow the prompts to confirm deletion.

The *Library* contains narratives for Civil Works Contracts, Military Contracts, and any other report types desired. For example, if an Office is conducting HUD inspections, specific narratives may be needed to coincide with the internal reporting system.

Clicking *OK* presents the user with the Narrative edit screen below:



Select the *Safety Related* checkbox if the narrative is related to safety.

Select the *Unresolved Issue* checkbox if the item will require further action or confirmation.

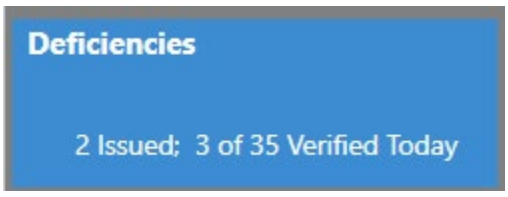
Enter the shift via the *Shift* dropdown (shifts are configured in the ***Administration | Contract Setup*** area).

Each narrative is linked to the QA Representative entering the comment, as selected in the *Staff* lookup field (blue *Staff* box).

Click *Back* to go back to the Narrative list and save this particular QA Narrative to the database.

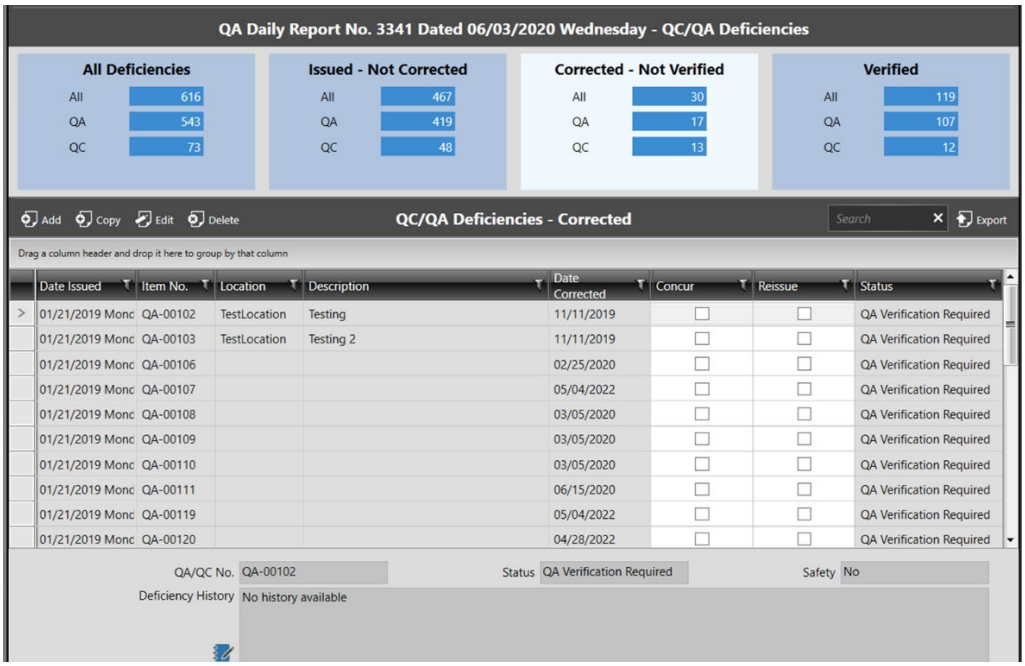
To ensure consistency between offices, Districts often have certain mandatory narratives that must be included on every report. It is possible to create a QA report for a date in the future that contains all the narratives, then use the *Copy Narratives from Previous Report* option to easily include the mandatory narratives without needing to manually select each one for every report. Select the Narrative to copy from the lookup provided and confirm the selection.

7.1.5 Deficiencies



Deficiency Items by QA gives the Government a means to communicate to the Contractor comments resulting from an inspection, site visit, or various other reviews. This communication may be of a positive or negative nature. The comment can complement the Contractor and the workforce, or can document a problem, deficiency, or safety item. Using QA Comments function in RMS, the Government can draw the Contractor's attention to an overlooked item, faulty workmanship, or job site conditions, to name a few. If the comment is issued as an action item, the comment is placed on a QC list to be corrected by the Contractor, reported corrected by the Contractor, and then verified by the Government. The Government can then track the action until it is reported completed and the Government concurs that the action is completely satisfactory.

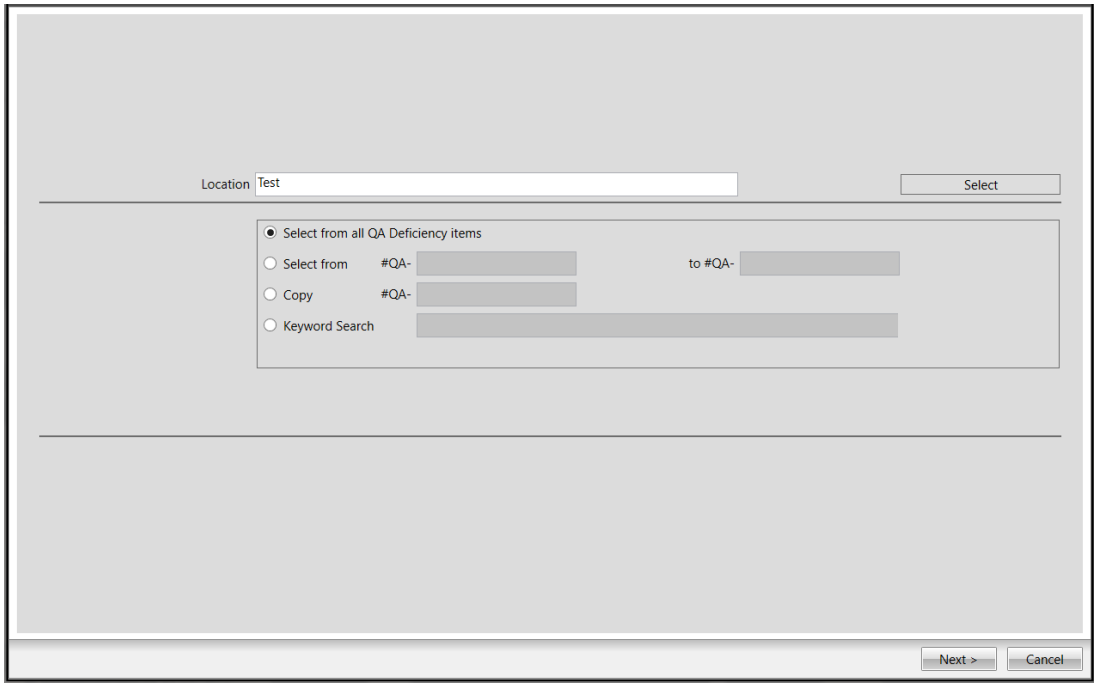
The *QA/QC Deficiencies* area allows for various sorting based on *All Deficiencies*, *Issued - Not Corrected*, *Corrected - Not Verified*, and *Verified*. Each one of these sorting options can be further sorted down to *All*, *QA*, or *QC* at the top. The default view is the *Corrected – Not Verified* view.



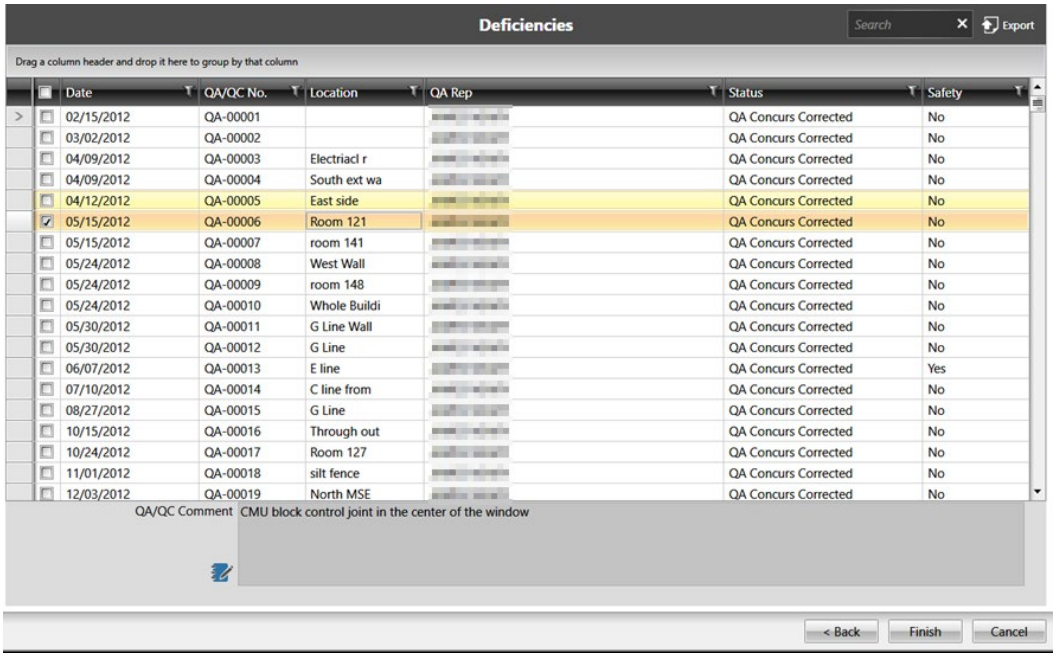
While individual items can be edited and added by using the corresponding buttons, RMS also allows users to agree with or reject the Deficiency using the *Concur* or *Reissue* checkboxes, respectively.

An item needing concurrence is awaiting QA Verification and will be listed as *QA Verification Required*. Items verified, will be listed as *QA Concurs Corrected*. QC Deficiency items that are set as reissued will be removed from the list and be sent back to the Contractor for corrections. QA Deficiency items that are set as reissued, will remain in the list with an update to the Deficiency History showing the rejection.

RMS allows copying of deficiencies from specific locations with use of the *Copy* button.

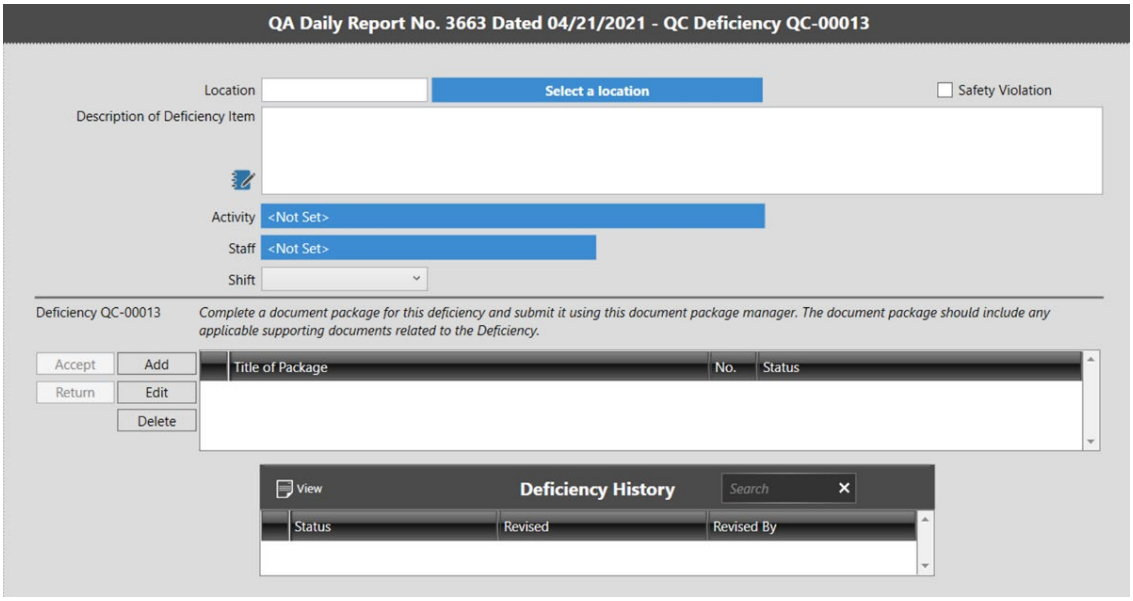


Click *Next* when the location and filtering options have been entered.



Select the Deficiency to copy and click *Finish* to complete copying the Deficiency into the Daily Report.

Adding a Deficiency brings up the screen displayed below:

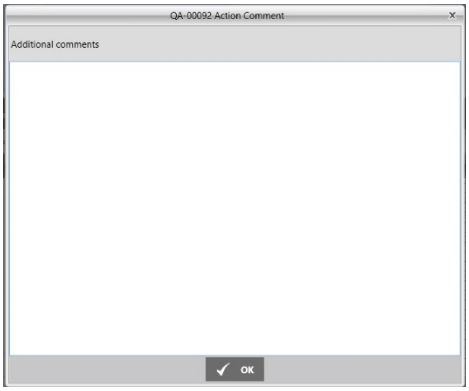


Similar to Narratives, choose the Shift, whether or not the deficiency is related to an activity, and at the top, locations can be added (typed in) or selected from the lookup. The lookup is a combined list of previously entered locations. Check the Safety Violation box if the issue is related to a safety violation.

If users need to add any documents to a deficiency, it can be done in the Document Package section of the deficiency itself. Please see the section on Document Packages (Volume 1, section 2.4 of the Government manual) for how to add documents to this Document Package.

The *Deficiency History* in a newly created QA/QC deficiency or while editing a QA/QC deficiency, will show the following informational changes:

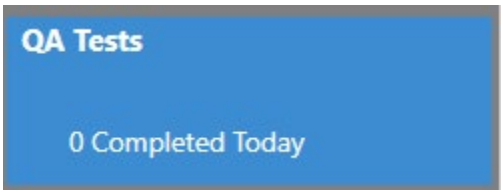
- A Deficiency is added by way of either the *Add* button or the *Copy* button.
- A Deficiency is corrected.
- A Deficiency is marked as Concur.
- A Deficiency is returned or reissued.



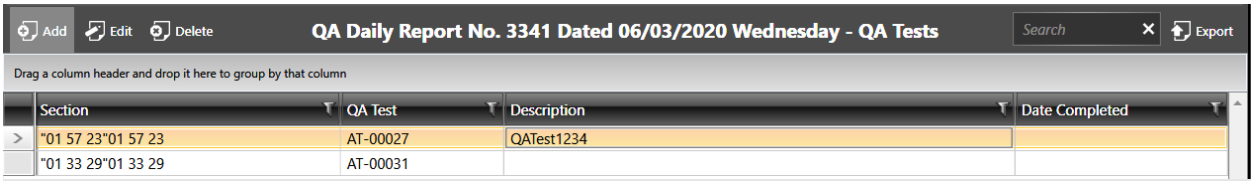
Note: When a deficiency is marked corrected, concur, or reissue, a prompt is presented requiring a comment or explanation for the action. As seen on the right.

When the Contractor has reported that one or more Deficiency Items have been corrected, the Government is responsible to inspect and verify that it was corrected satisfactorily. If the Contractor has reported a Deficiency Item corrected, it will remain on the Pay Estimate Worksheet until this Verification is recorded. If the Contractor has not corrected the deficiency satisfactorily, the Worksheet will show as being an outstanding Contractor action item. However, if the Contractor has reported it corrected, and the Government has not recorded the results of this verification, it will show as an outstanding Government action.

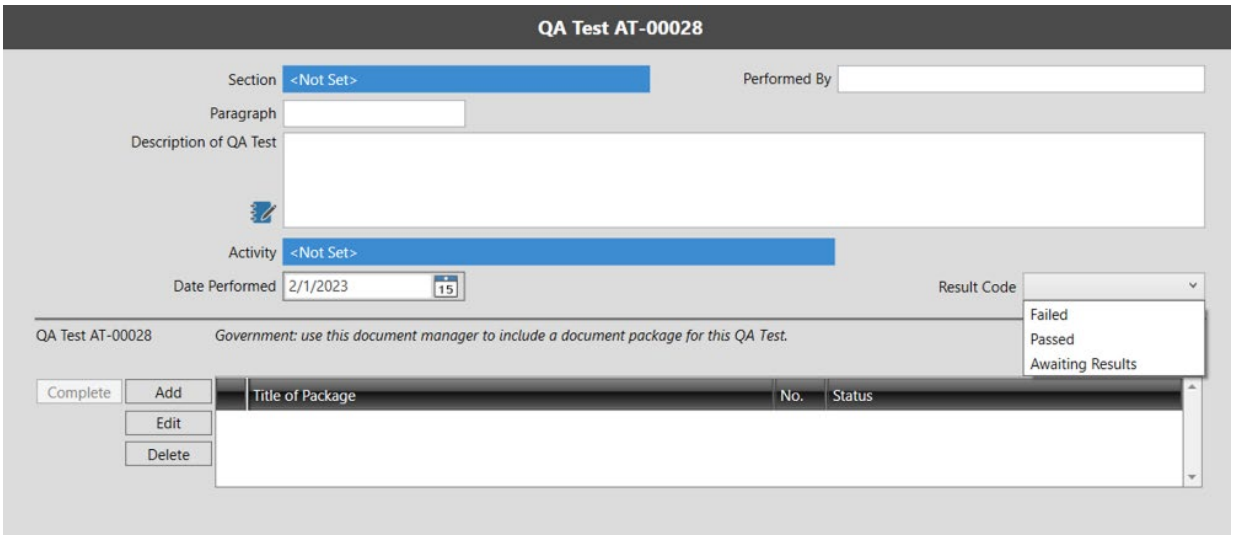
7.1.6 QA Tests



Not only are Quality Control Test records required, but Government personnel must also perform Quality Assurance Tests and record the results of such tests. Engineering Regulation ER 1180-1-6 specifies the percentage of QC tests the QA should perform. This selection affords RMS the ability to track and record this required data.



Click the *Add* button to add a new test or double click on a test listed to view the *QA Test Edit View*.



This screen records the following information for this QA Test, and the data should be filled out completely:

Section: Use this lookup field to choose the Specification Section number associated with the test.

Paragraph: Enter the paragraph associated with the above mentioned Specification Section.

Performed By: Enter the name of the person who will (or did) perform the test.

Description of QA Test: Enter a full description of the test and any relevant comments on the test.

Activity: Use this lookup field to select the Pay Activity associated with this test.

Date Performed: Pick the date on which the test was completed.

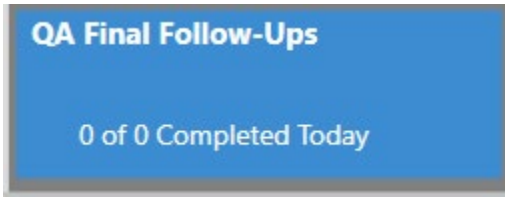
Result Code: Choose the status of the test. This will only show once the *Date Performed* date has been entered.

The Document Package section is available if documents need to be attached to this QA test. Click on *Add* to add a new Document Package, if needed. Refer to the instructions found in Section 2.4 Document Packages in Volume 1 of this RMS Government Mode manual. Click the *Back* button to save the changes.

Continue to add/edit any other QA Tests for as many tests that were accomplished for the day's report.

To delete a QA Test, make a selection and click the *Delete* button. Then follow the prompts to confirm deletion.

7.1.7 QA Final Follow-Ups

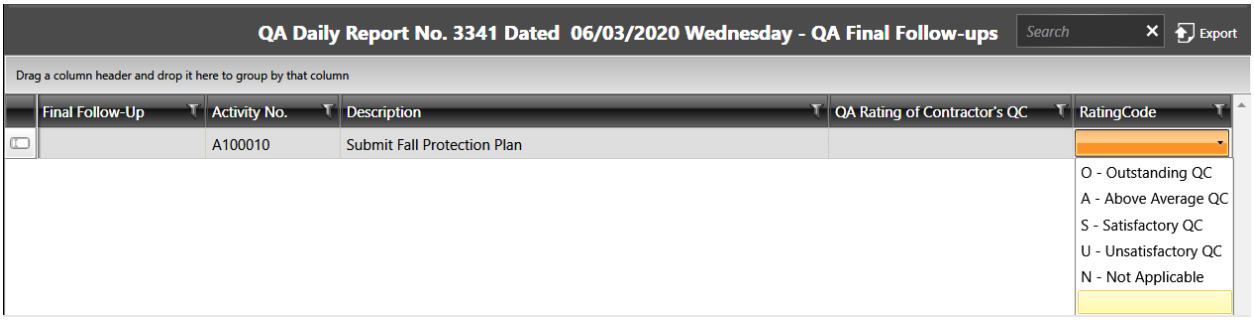


RMS allows the Government Representative to document the Contractor's Quality Control efforts, successes, and failures. An effective and conscientious QC program will almost always result in a good quality project. When the Contractor has reported that one or more Pay Activities has been completed, the Government is responsible to inspect and verify that the activities were completed satisfactorily. A satisfactorily completed activity is not always the sign of an acceptable QC program. The activity itself may be of outstanding quality (and even far exceed the minimum requirements of the contract), however, it may be more due to Government successes and not the Contractor's. In this case, the Contractor is rated with a less than Outstanding rating.

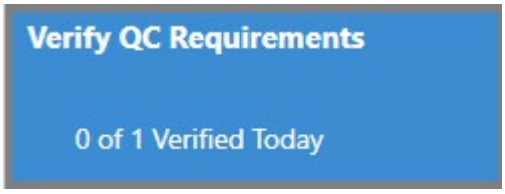
Note: The rating is for the Quality Control efforts, not the quality of the activity.

If the Contractor has reported an Activity complete, it will remain on the Pay Estimate Worksheet until this Final Follow-up Inspection is recorded. If the Contractor has not completed it satisfactorily, the Worksheet will show it being an outstanding Contractor action. However, if the Contractor has reported it completed, and the Government has not recorded the results of the Final Follow-up Inspection, it will show as an outstanding Government action. QA Final Follow-ups are ratings by the Quality Assurance Representative when the Contractor reports a pay activity complete. These individual QC ratings (one for each activity) will assist when determining the Contractors' overall Quality Control performance evaluation at the end of the contract. These ratings become the backup for the Contractor's final, or interim, performance evaluation. This is extremely important for substantiating an outstanding or unsatisfactory rating for the Contractor.

The Government enters the Rating Code and RMS will automatically populate the date of occurrence based on the date of the QA daily report.



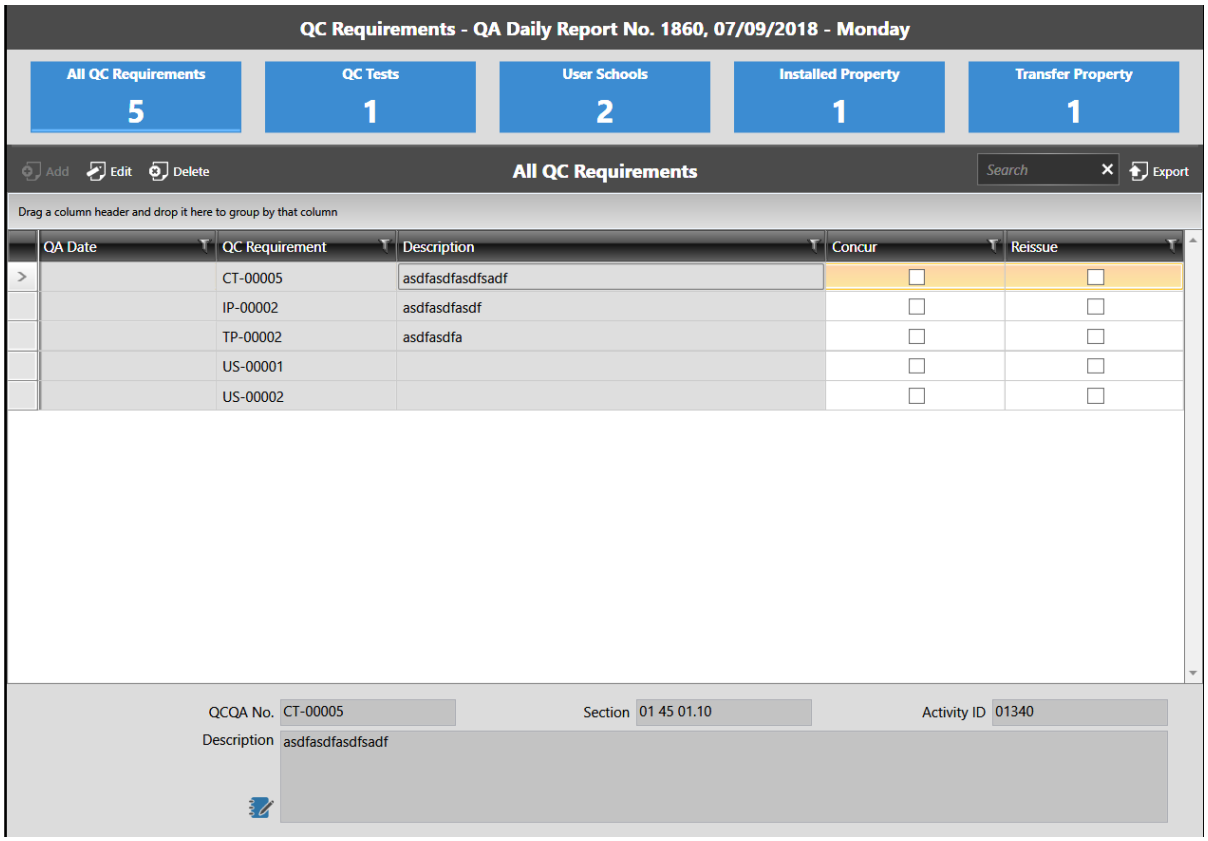
7.1.8 Verify QC Requirements



RMS titles this group of actions or contract requirements as *Verify QC Requirements*. Many of these actions are critical enough to be specifically verified by the Government. It would not be reasonable that the Government QA Staff be required to verify 100% of these actions, therefore only a representative number should be selected from each of the categories as requiring specific verification from the QA Staff. This selection should take place during the initial planning stages of the contract, after the requirements are identified and coordinated with the Contractor's CQC Plan.

The first tab of this section is the Required Verifications – Summary Tab. It is intended to provide a quick overview for the Manager to see at a glance the number of each item and the percentage of each item that will be verified.

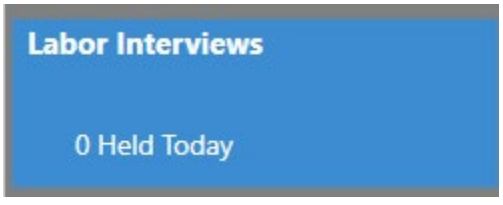
The QC Requirements appear in the Contractor's QC Daily Report screens, until the requirements are updated and reported complete (with a passing grade if the requirement is a test). Just as with completed activities, once a QC Requirement is reported complete, it appears in the Government QA Report area to be verified if required. If the action taken by the Contractor complies with the requirement, the item is officially complete. If the requirement is reissued, it appears again in the Contractor's list and the cycle repeats itself.



Indicate whether there is concurrence that the item is completed satisfactorily or reissue the item back to the Contractor for further action. The date of QA Daily Report will populate in the QA Date column once a checkbox is selected.

Note: The sorting tiles on the top (All QC Requirements, QC Tests, User Schools, Installed Property, and Transfer Property) will display only those types of QC requirements listed in the tile.

7.1.9 Labor Interviews



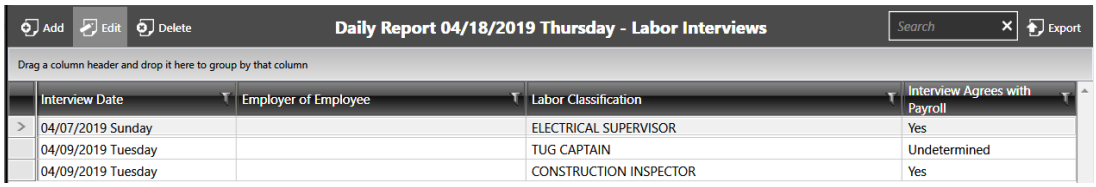
Labor Standard Interviews are required by the U.S. Department of Labor and are to be performed periodically throughout the life of the contract. If the regional Wage Decision (Labor Rate Table) has been entered during the planning stages of the contract, RMS can pull in the correct hourly rate for the employee's labor

classification and calculate the dollars due to the employee if not paid correctly. If the employee is paid less than the labor classification amount from the Wage Decision, RMS displays the rate Difference Due and the Amount Due in the appropriate blocks.

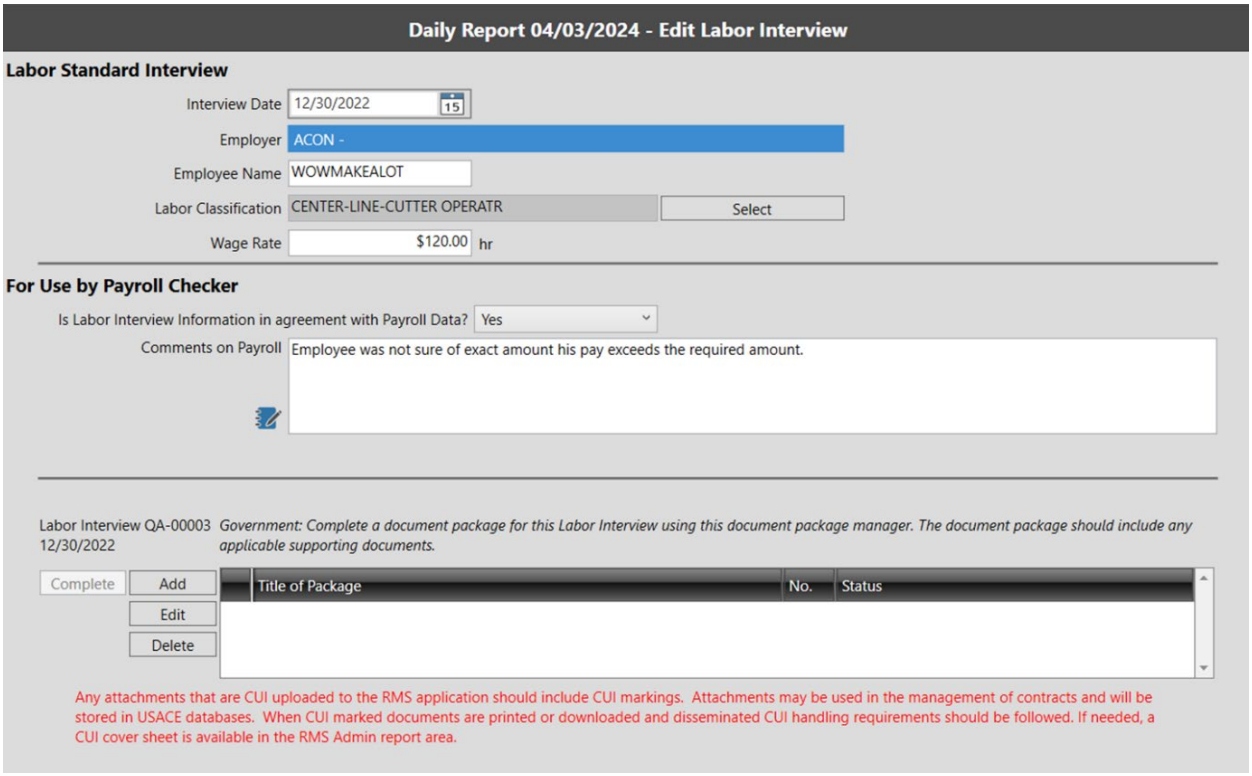
> *Note:* Access to this module has been limited to user's who have completed the UPASS PII (Personally Identifiable Information, such as bank account numbers, phone numbers, SSN and other information used to identify a person) training. User's that log in to RMS using a CAC will have access to this module, however, users who log in with a username, must submit PII Training certification proof to the PII Admin for the user's district to obtain access to this module. To get access to PII in RMS, please contact the PII District Admin for the district. There is a list of all district PII Admin's 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 PII district admins) to obtain this link.

After conducting the interview and completing the appropriate form, enter the information into RMS by clicking the *Add* button. To edit a prior entry, click the *Edit* button. To delete a prior entry, click the *Delete* button.

> *Note:* For OCONUS Contracts, Labor Interviews are not required for overseas contracts, although there are exceptions.



From the above screen users can *Add*, *Edit*, or *Delete* Labor Interviews.



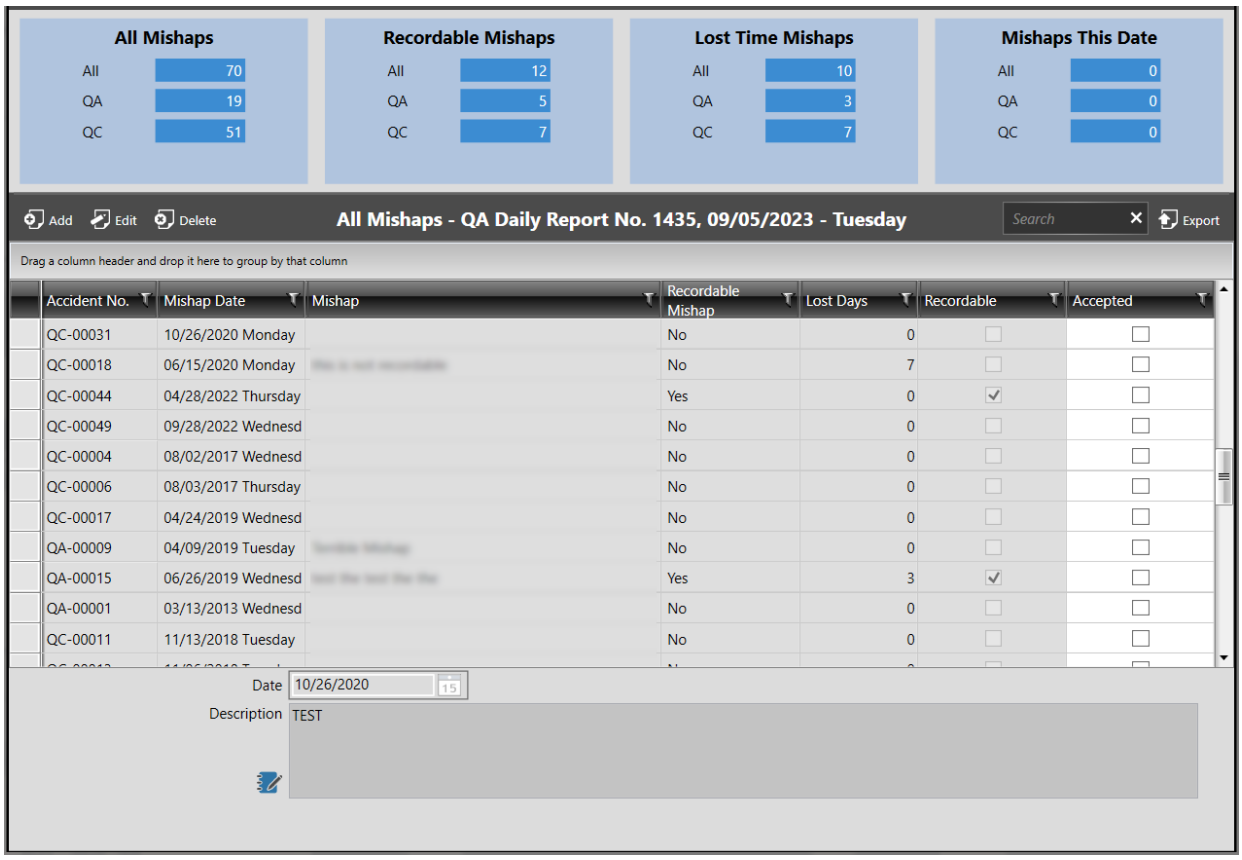
From the information gathered from the employee, enter the name, address, classification, and hourly wage reported.

Note: While there is a Document Package provided for this area it is important not to upload anything with PII into RMS.

7.1.10 Mishap Reporting

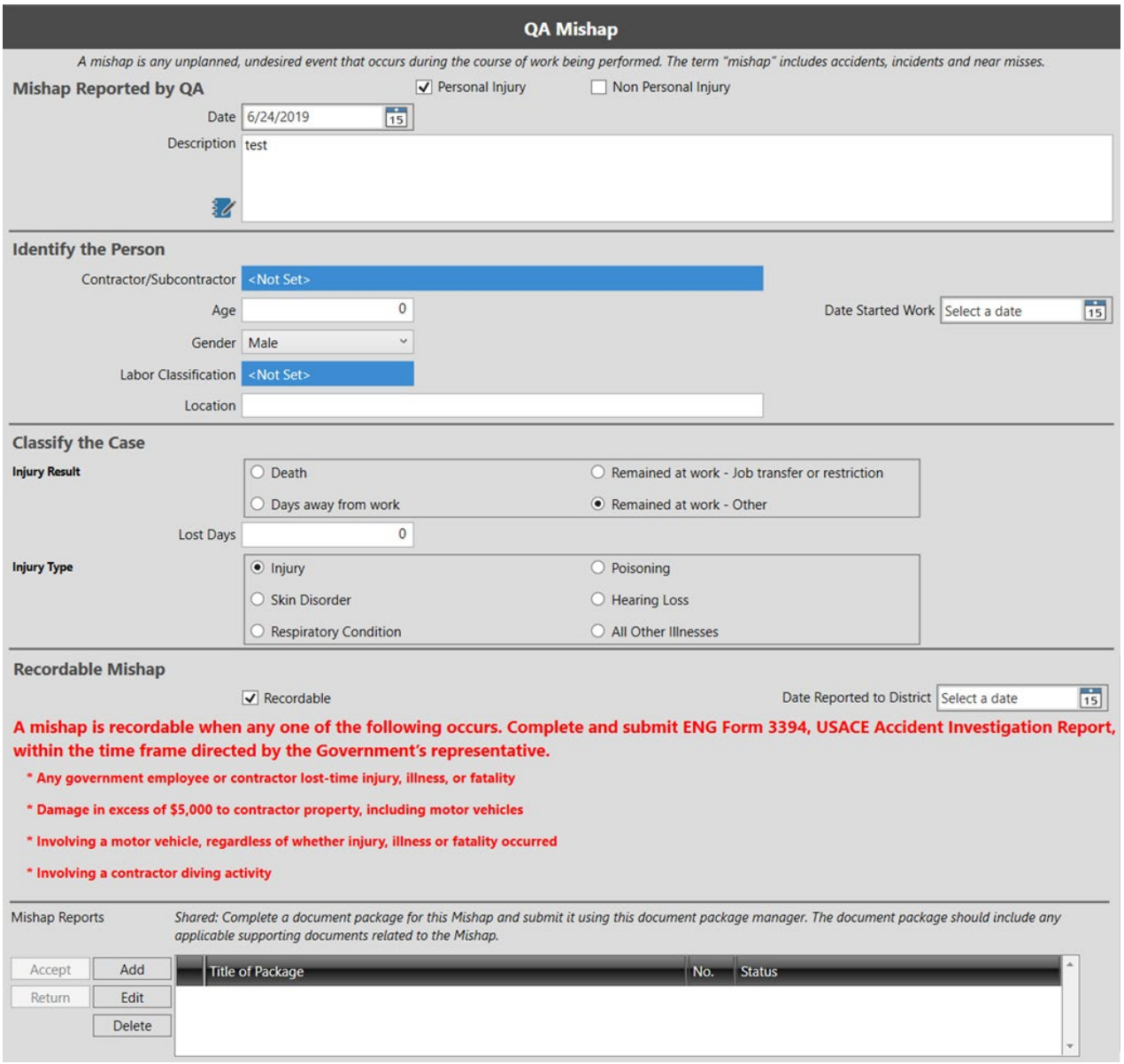
Construction Accident Reporting typically begins with the Contractor. The Contractor will first enter the details of the accident in Contractor Mode. The Government can then make comments on the accident in the Daily QA Report. The Government can also make comments on accidents that do not appear on the QC Report. For example, if a Government Employee is injured not directly on the site of the work, the QA Report might address the issue in some detail.

It is important for the Contractor to utilize the appropriate call chain and notify the Government as soon as possible so the Government can provide essential direction and assistance. The Government will work with Contractor to determine if the accident is reportable or recordable.



QC Mishaps will have the "QC" prefix, while QA Mishaps will have the "QA" prefix on the *Accident No.*. Click *Add* to include a report of any mishap occurring on the report date or click *Edit* to edit

a mishap already created. Adding or editing a mishap created in GM will display the QA Mishap editing screen below:



Enter the following information:

Personal Injury: Check this box if a person was injured.

Non Personal Injury: Check this box if there was property damage only and no person was injured.

Date: The date for which the report is being created will automatically populate and cannot be changed.

Description: Describe the mishap in as much detail as possible. Include Contractor involved, location, time, activity in progress, actions taken, any environmental factors, etc.

Contractor/Subcontractor: Identify the Contractor for which the injured employee works. Click

on the blue box to display the Subcontractor Lookup table. Select the Contractor involved in the mishap.

Age: Input the age of the injured employee.

Date Started Work: Click on the calendar widget to select the date on which the injured employee first started working on the contract.

Gender: Select the injured employee's gender, male or female.

Labor Classification: Identify the Labor Classification with which the injured employee is associated. Click on the blue box to display the Labor Classifications Lookup table. Select the appropriate occupation.

Location: Identify where the mishap took place. This field is limited to 50 characters.

Injury Result: Identify the status of the injured employee because of the mishap. Select from one of the options.

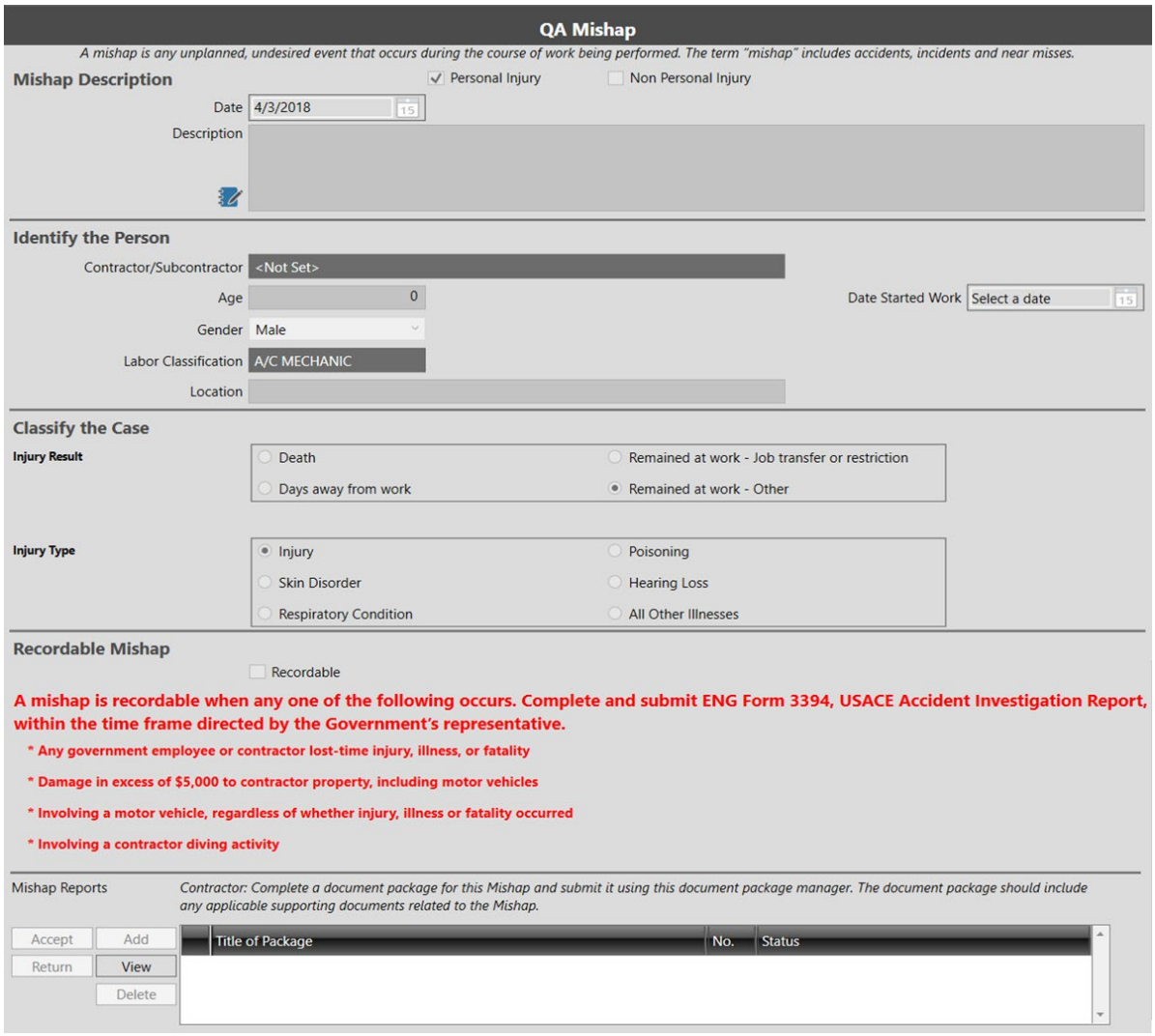
Injury Type: Identify the type of injury sustained by the injured employee. Select from one of the options.

Recordable? Check this box if the Mishap meets any of the Recordable criteria listed in the screen.

A shared Document Package is available for scanned documents or any other attachments.

> *Note:* If recordable is checked additional information will such as, the lost days and the date it was reported to the district will be requested.

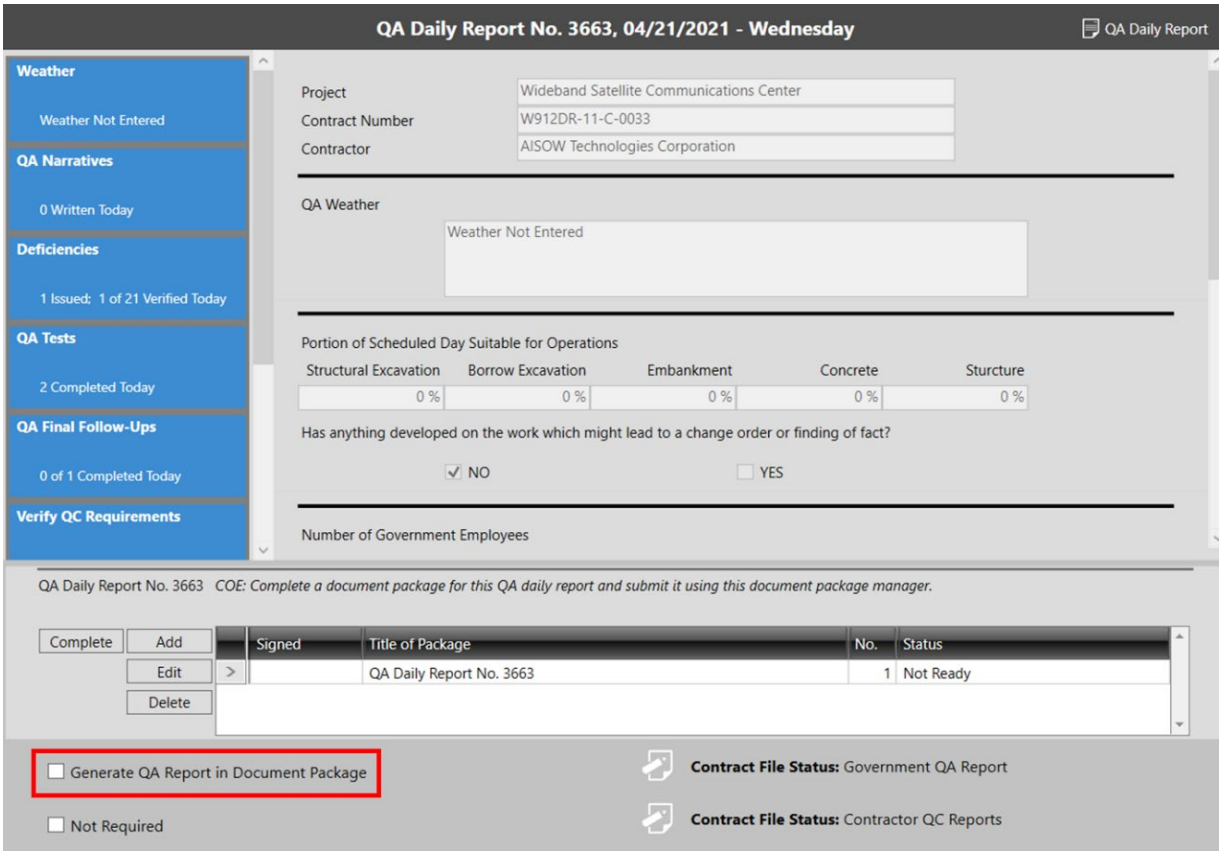
When viewing a QC Mishap, the same fields as seen in a QA Mishap will be displayed, but cannot be edited in GM, as seen below. The QC Mishap's Document Package is also shared between the Government and the Contractor.



7.1.11 Completing the QA Daily Report

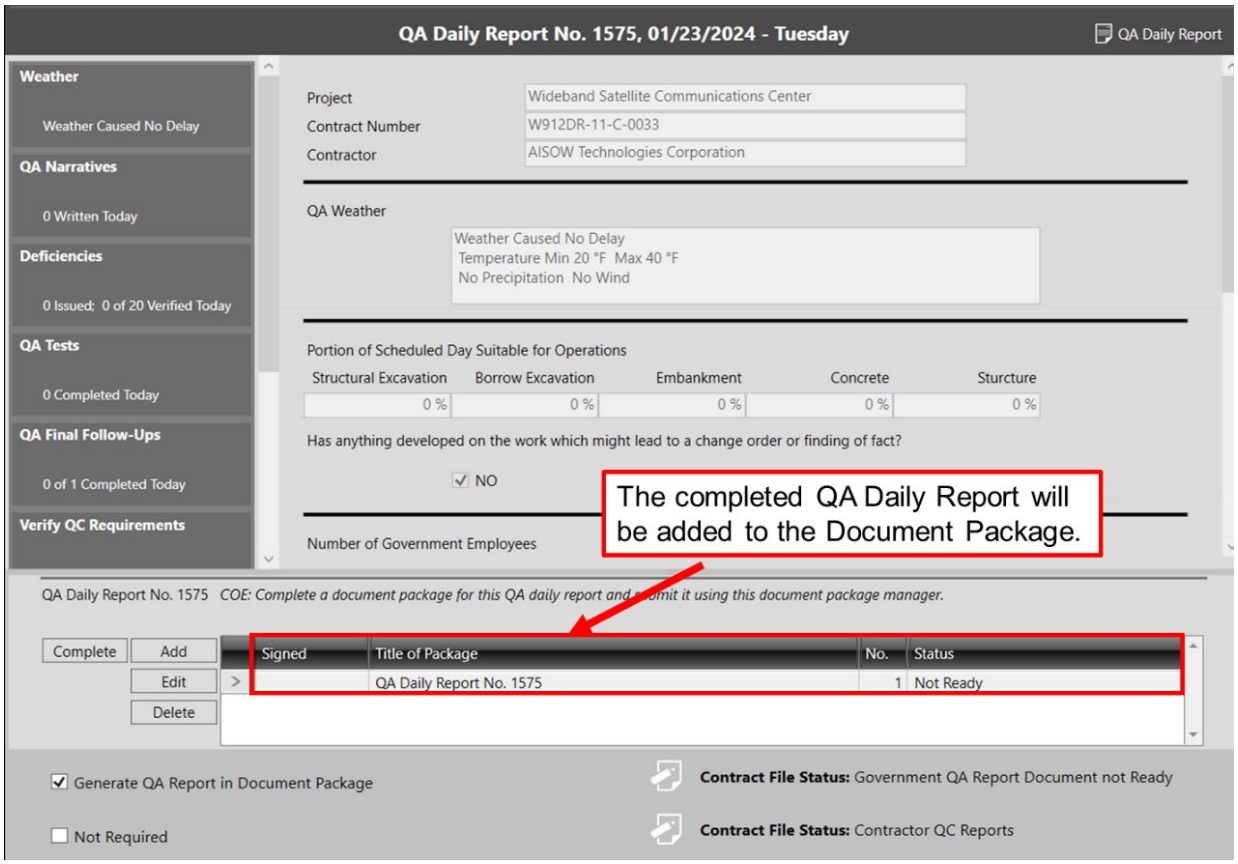
Completing the QA daily report is a multi-step process. There are two ways to complete the QA daily report. If multiple reports need to be completed at the same time, then the user can use the ***Multi-Sign QA Daily Reports*** option at the top of the QA Report list, to automatically complete the report. If there is only one report that needs to be completed, then the user can manually complete the report.

Once all information has been entered, it is possible to preview the report before it is completed. To preview the report before completing it, click on the *QA Daily Report* button in the upper right corner. If everything looks correct, the first step to completing the report is to check the *Generate QA Report in Document Package* checkbox at the bottom.



Note: The report is still not complete, the QA report must still be signed by both the QA representative and the Project engineer and the Document Package accepted before the report will be sent to PCF to complete the report.

Once this checkbox has been checked, RMS will create the QA report and place it in the first Document Package that was created previously when the report was started.



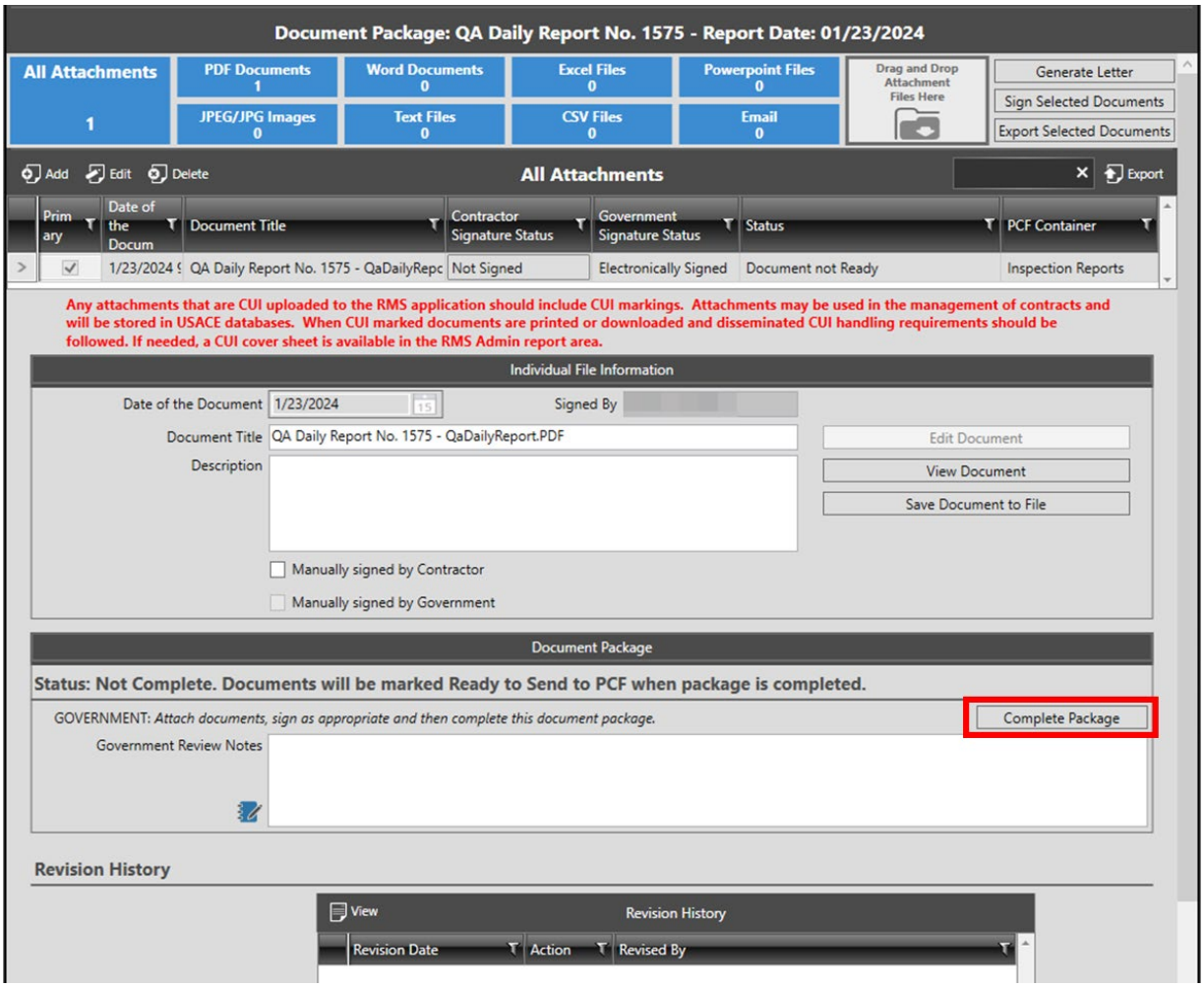
Note: If the Document Package was completed prior to checking the *Generate QA/QC Report in Document Package* checkbox, RMS will create a new Document Package and place the new report into that Document Package.

The QA representative will now need to go into the Document Package to sign the report. Please see the section 2.4 Documents Packages in Volume 1 of this manual for directions on signing this report.

Note: When signing as the QA representative, make sure to change the signature location to QA Rep.

Note: If there are multiple auto-generated QA Daily Reports in the Document Package, the *Primary* checkbox will be editable for those documents.This checkbox is used to signify the most current version of the auto-generated document. If needed, users can switch between each to indicate which copy is to be used as the primary document.

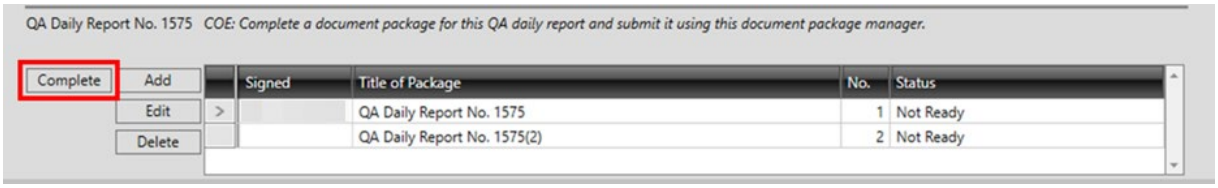
The final step in completing the report is for the Project Engineer to sign the QA report and complete the Document Package. A single Document Package can be completed by using the *Complete Package* button within the Document Package edit view.



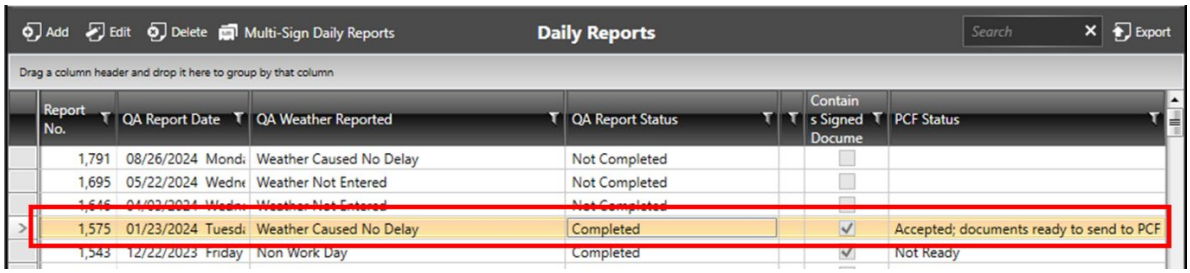
Note: Revision History is available for the Document Package within QA Daily Reports.

A *Complete* button outside of the Document Package data grid is also available. This button will complete all open Document Packages that contain documents and delete any empty document packages.

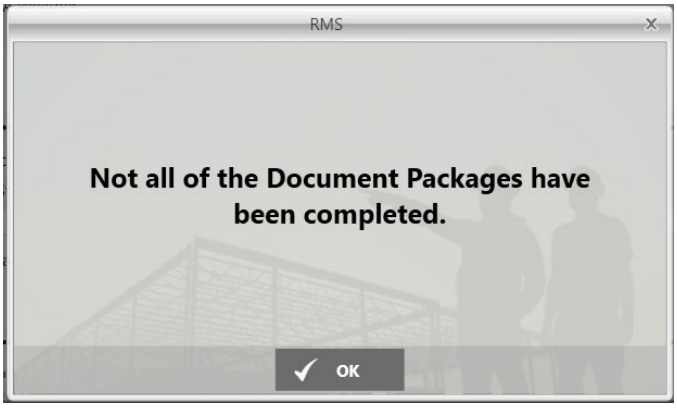
Note: Ensure that the QA Daily Report has been reviewed and all necessary signatures have been added before clicking this button.



Once the Document Package is complete, the report is complete. To confirm a QA report is complete, the QA Status will display “Accepted; documents ready to send to PCF”.



If there are any Document Packages that have not been accepted when navigating out of the daily report, users will see the window below. This is just to let users know that the Document Package may need to be completed before the QA Daily Report is fully finished.



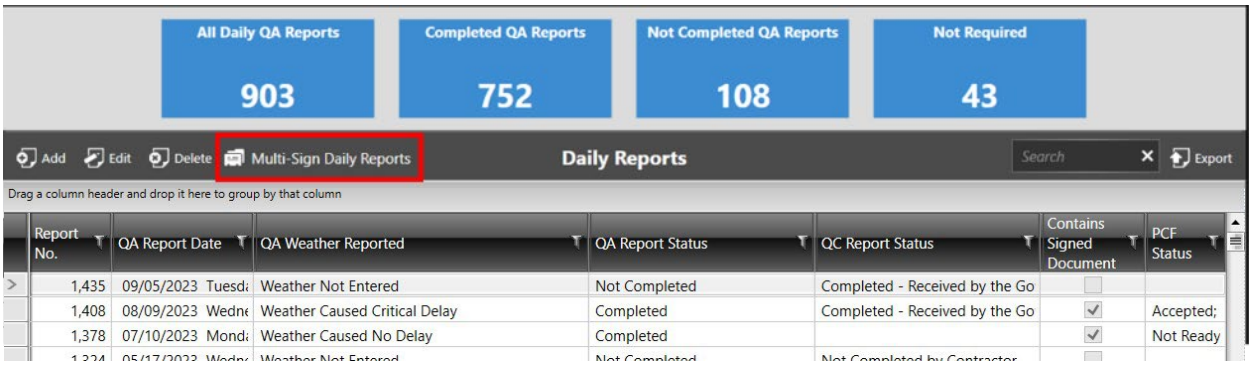
Note: This message will display upon exiting the daily report *only* after the *Generate QA Report in Document Package* checkbox has been checked.

Click *OK* to navigate back to the QA Daily Reports Selection View.

7.1.11.1 Multi-Sign QA Daily Reports

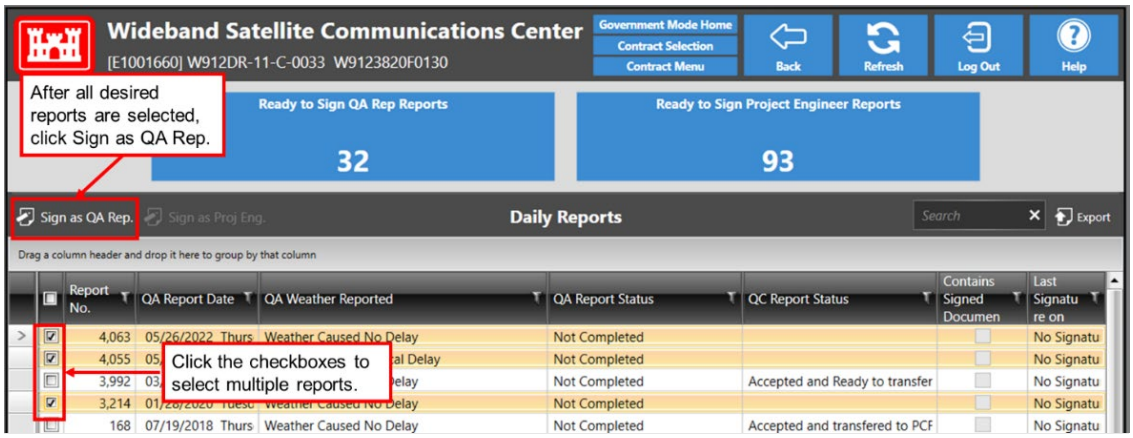
There are two signatures on the daily report, the QA representative, and the Project Engineer. The Project Engineer signature is the one that will complete the Document Package and send it off to PCF.

To sign multiple reports at a time, navigate to the ***QA Daily Reports*** module under the ***QA/QC*** tab and choose *Multi-Sign Daily Reports*.



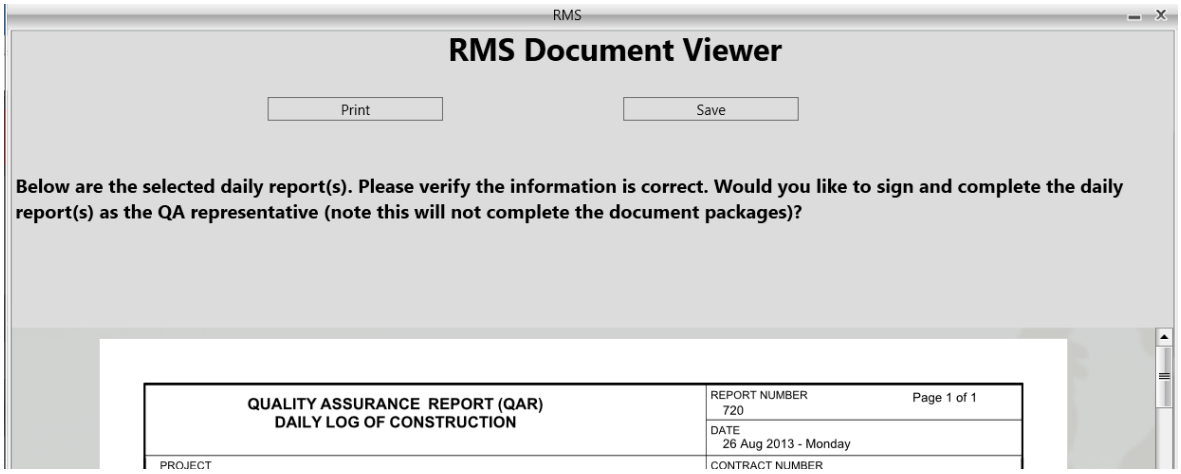
The first signature is the QA Rep signature. To sign as the QA Rep, click on the blue sort tile *Ready to Sign QA Rep Reports*.

Next, select all the reports that need to be signed by the QA Rep by clicking on the checkboxes to the left of the report. When all desired reports are selected, click on the *Sign as QA Rep*.



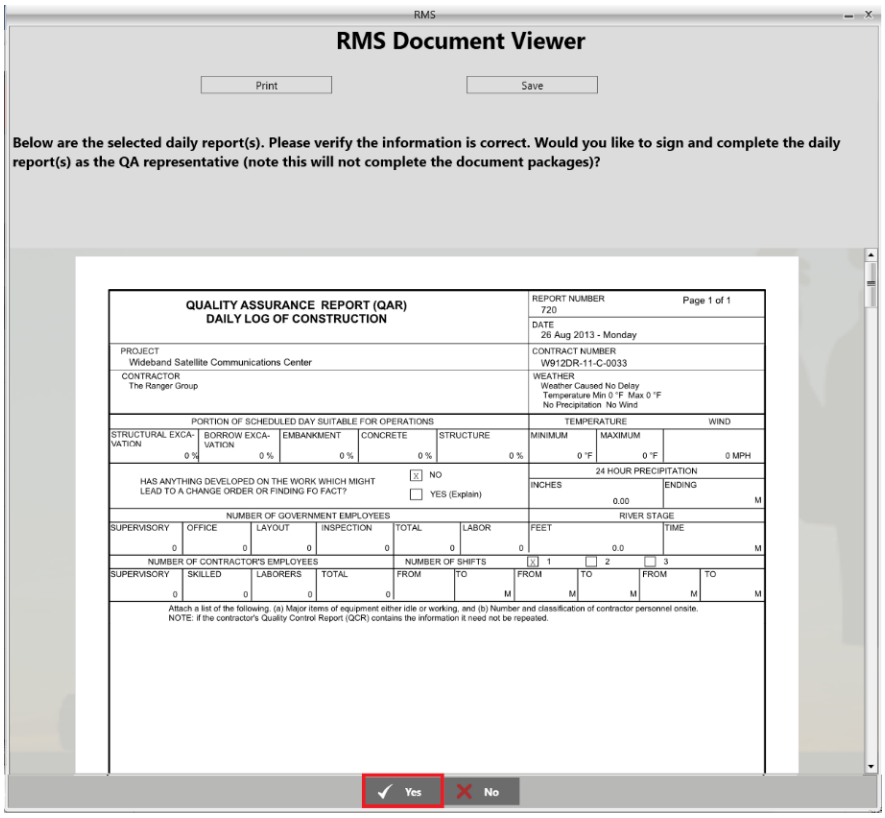
Note: Only reports that have NOT been marked as completed will display in this list. If a QA report has multiple Document Packages, then the report will display in this list twice.

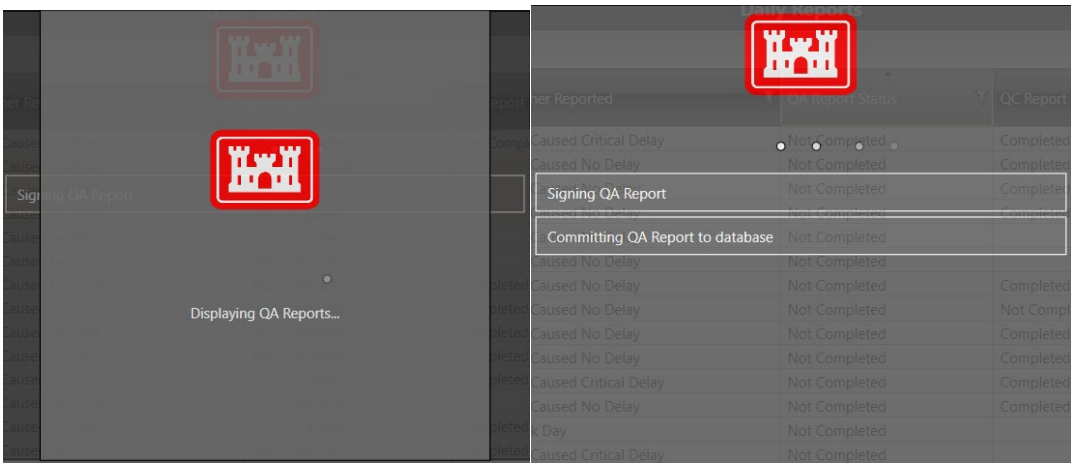
After clicking on the *Sign as QA Rep*, RMS will display a preview of all the reports that will be signed.



Note: Signatures will not display in this preview of the reports as the signatures have not been applied yet. After the signatures have been applied, the signatures can be viewed by going into the individual report's Document Package.

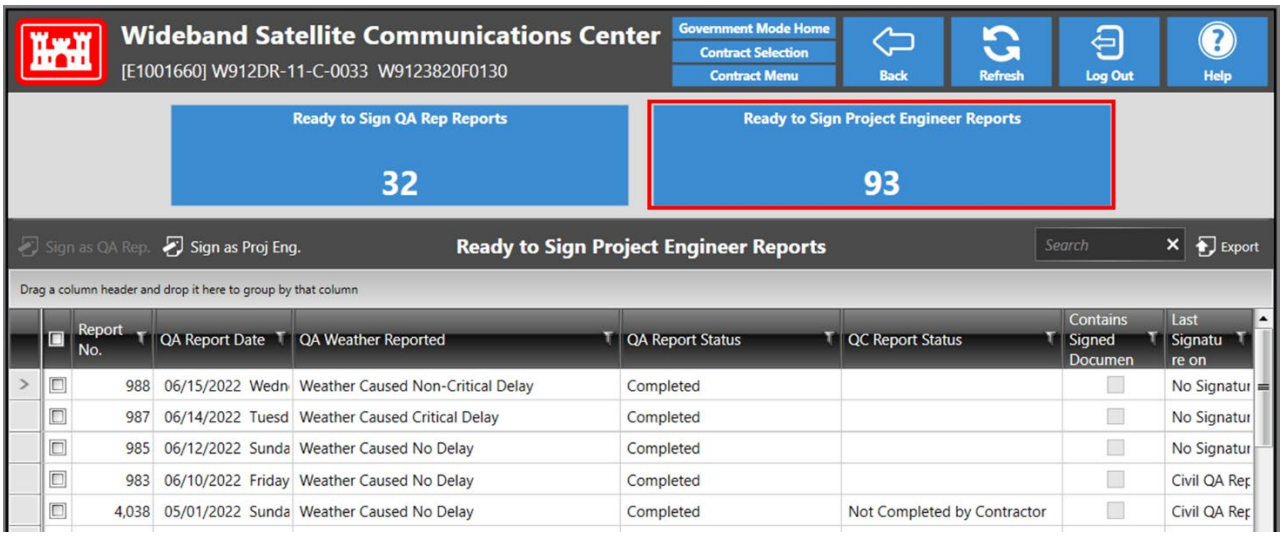
After reviewing all the reports, click on *Yes* to finish signing the reports. A prompt for the user's pin (if user is logged in with a CAC) or a password (if user is logged in with an email account) will display. After the pin/password has been entered, the screen will display the process of signing the documents.





The amount of time it takes for this process depends on the number and size of reports and the user's connection to RMS servers.

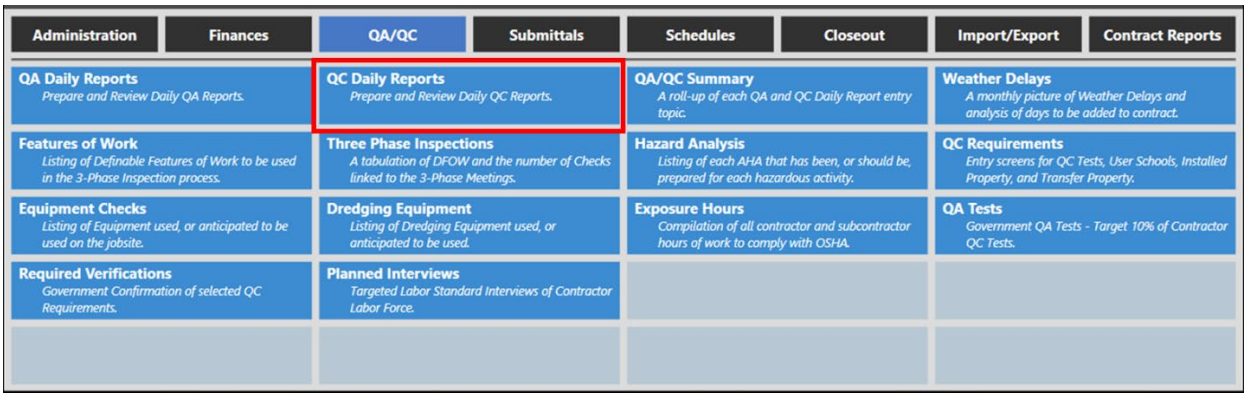
Once the QA Rep has signed the report, the Project Engineer can now sign and complete the documents to send to PCF. Back on the Multi-Sign Reports page, click on the blue sort tile for *Ready to Sign Project Engineer Reports*.



Note: Only reports that have been completed (occurs when signed by the QA Rep) but still has an open/uncompleted Document Package will display in this list. If there are two Document Packages in a report, then the report will show in this list twice. The user will need to go into that report and delete the extra Document Package before continuing.

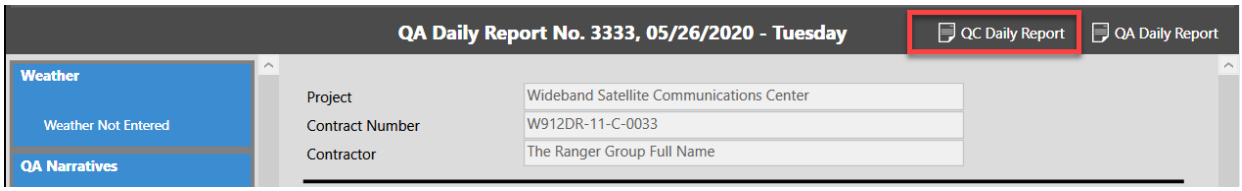
Use the checkboxes to the left of the reports to select the multiple reports to be signed, as seen in signing as the QA Rep. Once all desired reports are selected, click on the *Sign as Proj Eng.* button to begin the process of signing the reports. The process is the same as the process for signing as the QA Rep. Once the reports have been signed, the Document Package will be marked as complete, and the documents will be ready to send to PCF.

7.2 QC Daily Reports

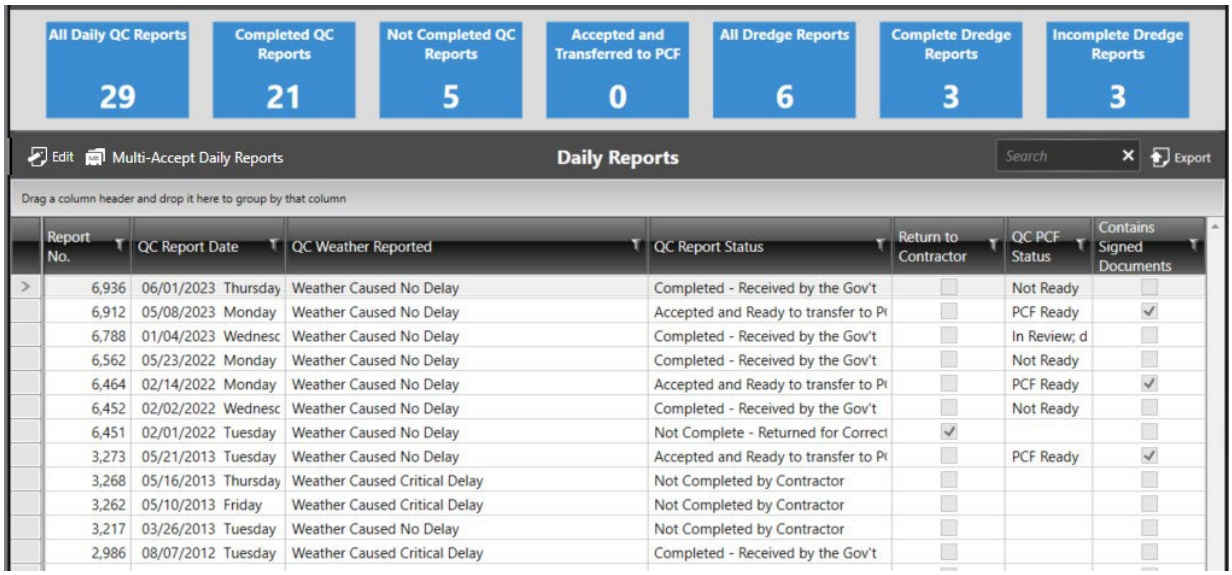


The *QC Daily Report* module allows the USACE Representative for the contract to view the QC Daily Reports that the Contractor enters and completes in Contractor Mode.

Note: When inside of a QA Daily Report, the QC Report can be accessed by using the *QC Daily Report* button in the top right corner of the screen if the corresponding QC Daily Report is completed (see below):



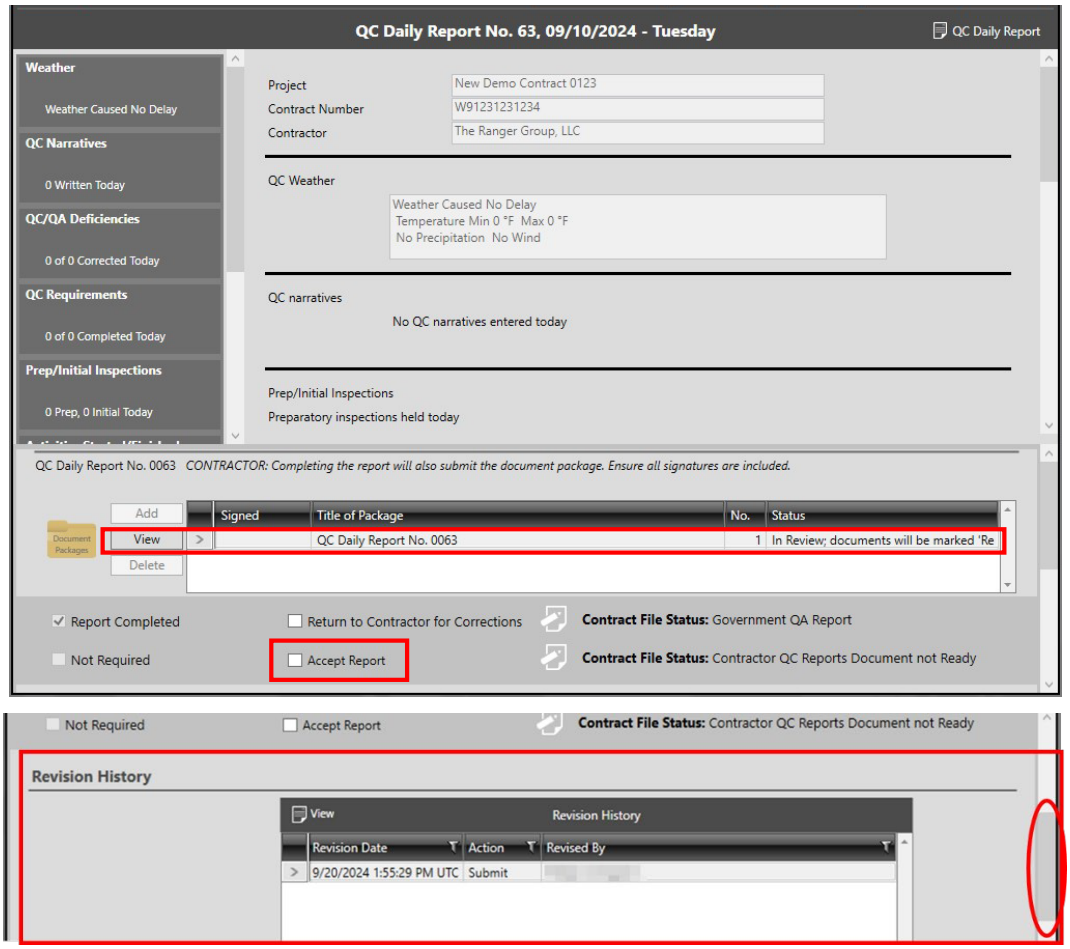
Back to the ***QC Daily Report*** module:



Report No.	QC Report Date	QC Weather Reported	QC Report Status	Return to Contractor	QC PCF Status	Contains Signed Documents
6,936	06/01/2023 Thursday	Weather Caused No Delay	Completed - Received by the Gov't	☐	Not Ready	☐
6,912	05/08/2023 Monday	Weather Caused No Delay	Accepted and Ready to transfer to P	☐	PCF Ready	☑
6,788	01/04/2023 Wednesc	Weather Caused No Delay	Completed - Received by the Gov't	☐	In Review; d	☐
6,562	05/23/2022 Monday	Weather Caused No Delay	Completed - Received by the Gov't	☐	Not Ready	☐
6,464	02/14/2022 Monday	Weather Caused No Delay	Accepted and Ready to transfer to P	☐	PCF Ready	☑
6,452	02/02/2022 Wednesc	Weather Caused No Delay	Completed - Received by the Gov't	☐	Not Ready	☐
6,451	02/01/2022 Tuesday	Weather Caused No Delay	Not Complete - Returned for Correct	☑		☐
3,273	05/21/2013 Tuesday	Weather Caused No Delay	Accepted and Ready to transfer to P	☐	PCF Ready	☑
3,268	05/16/2013 Thursday	Weather Caused Critical Delay	Not Completed by Contractor	☐		☐
3,262	05/10/2013 Friday	Weather Caused Critical Delay	Not Completed by Contractor	☐		☐
3,217	03/26/2013 Tuesday	Weather Caused No Delay	Not Completed by Contractor	☐		☐
2,986	08/07/2012 Tuesday	Weather Caused Critical Delay	Completed - Received by the Gov't	☐		☐

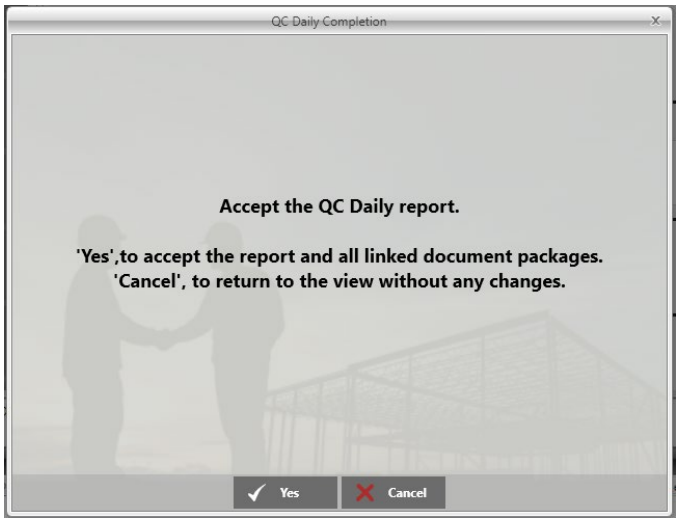
Note: If the contract is a dredging contract, the blue sort options on the top will display the Dredge sort options as seen in the figure above. Dredging reports can be reviewed by clicking on *Complete Dredge Reports* sort option, selecting the report needing review, opening the containing Document Package and reviewing the information there. Once completed, accept the Document Package to send the documents to PCF, if required. Otherwise, the only options available will be *All Daily QC Reports*, *Completed QC Reports*, and *Not Completed QC Reports*.

Editing a daily report displays the following screen and allows the USACE Representative to view the daily report as well as the signed QC Report (if the Contractor signed the daily report in the Document Package):



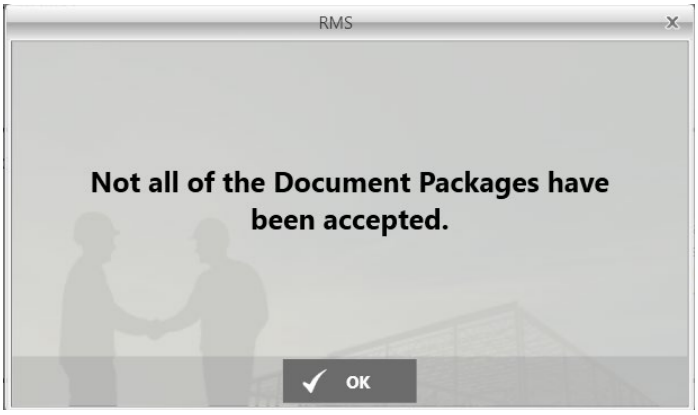
Note: Revision history can be found at the bottom of the screen in the *Revision History* table. This will capture actions taken on the QC Daily Report in CM and GM (Submit, Return, Accept). Select a revision entry and click the *View* button or double click a revision entry to open a read-only view of the QC Daily Report before the listed action was taken.

To complete the review of the QC daily report, the Government will need to go into the Document Package, sign any necessary attached documents (refer to the District Policy to determine if a document needs to be signed or not), and then check the *Accept Report* checkbox to accept both the report and any associated Document Packages.



Once the Document Package has been accepted, the documents can then be sent to PCF.

When attempting to leave this view without accepting any Document Packages, a warning will be displayed as a reminder. Clicking the *OK* button will return the user back to the QC Report Selection View.

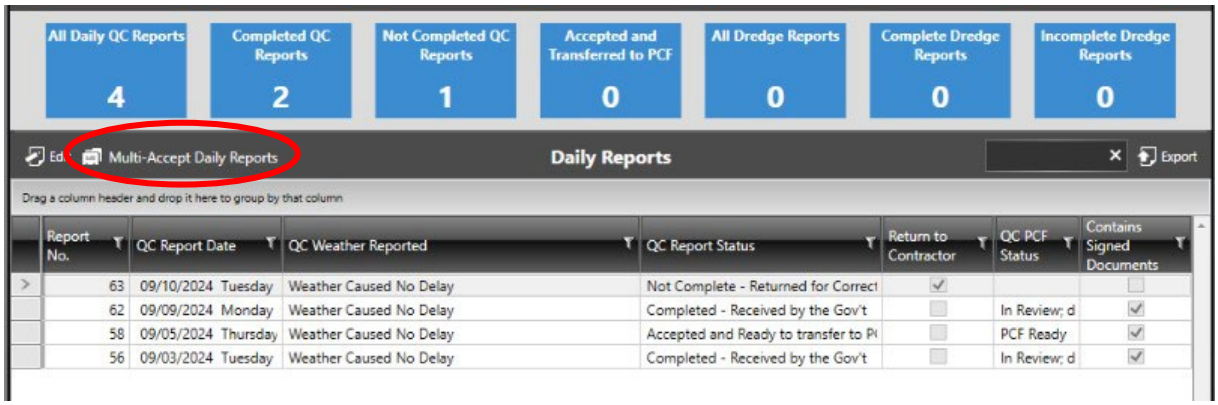


For directions on accepting and signing documents in the Document Package, please see the Document Package section 2.4 in Volume 1 of this manual.

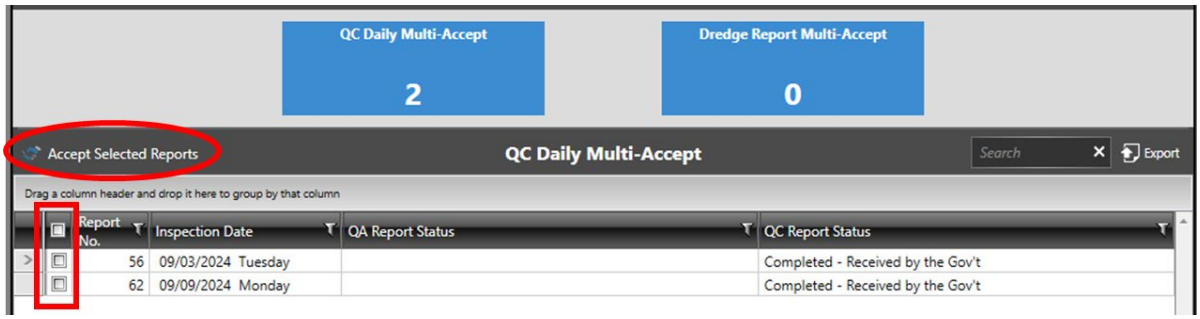
Note: If the Document Package status shows as “Not Ready”, then the Contractor did not submit the Document Package, and the Government will need to inform the Contractor to submit the Document Package before the Government can review the report.

7.2.1 Multi-Accept QC Daily Reports

If a contract has separate people assigned as a reviewer and an acceptor of the QC Daily reports, then RMS allows the acceptor to accept multiple QC Daily and/or Dredge reports at once by using the *Multi-accept Daily Reports* button.

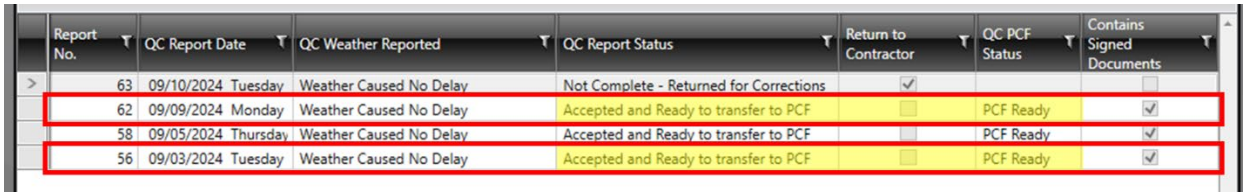


Upon clicking this button, the ***QC Daily Multi-Accept*** view will appear to allow selection of the reports that are ready to be accepted. Check each checkbox for the reports that are ready to be accepted or use the checkbox in the top row to select/deselect all reports.



Note: Ensure that review has occurred on selected reports prior to completing this action. This action cannot be reversed.

Once the desired selections have been made, click on the *Accept Selected Reports* button to complete the acceptance of the selected reports. The reports and any associated Document Packages will be accepted and the *QC Report/PCF Status* columns in the QC Daily Report selection view will reflect the accepted statuses.



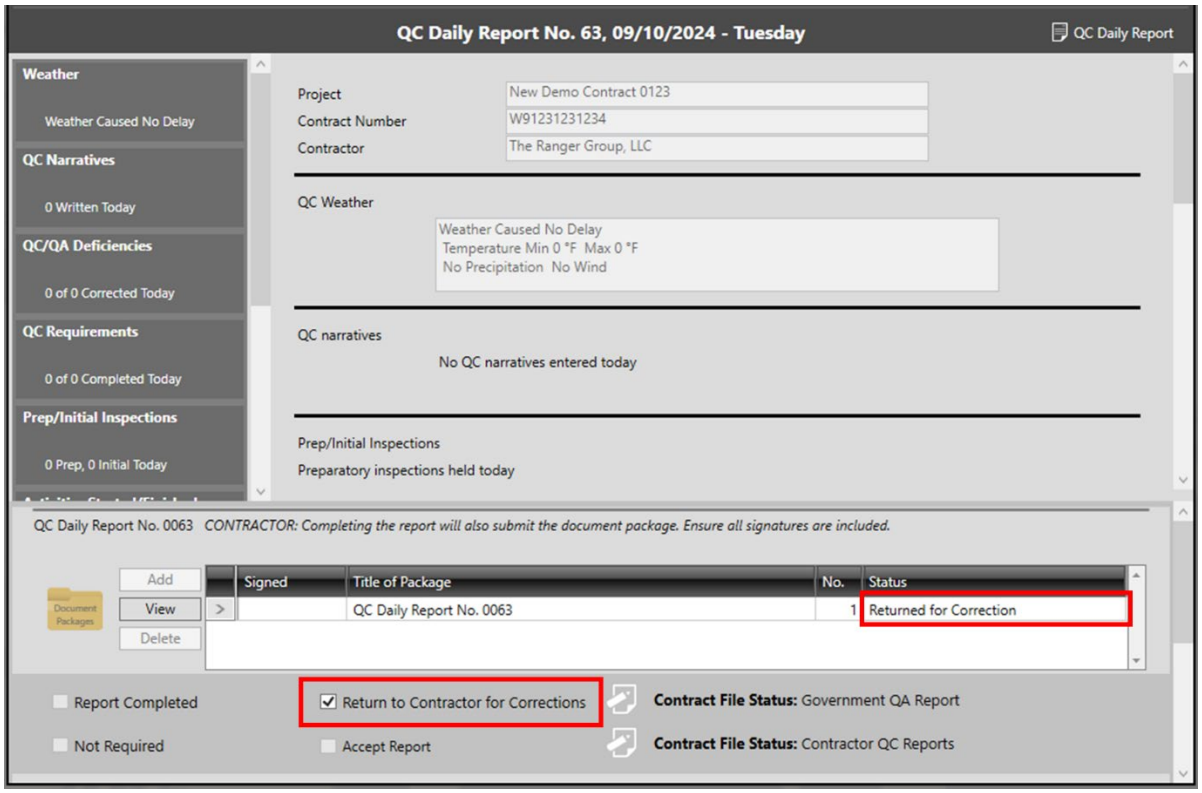
7.2.2 Returning QC Daily Reports for Corrections

There are two different ways to return QC Daily Reports back to the Contractor for corrections. Returns can be performed for a single report or on multiple reports at one time.

7.2.2.1 Returning a Single Report

To return a single QC Daily Report, check the *Return to Contractor for Corrections* checkbox in that QC Daily Report's edit view. Checking this box will return both the report and Document Package back to the Contractor so that the corrections needed can be made.

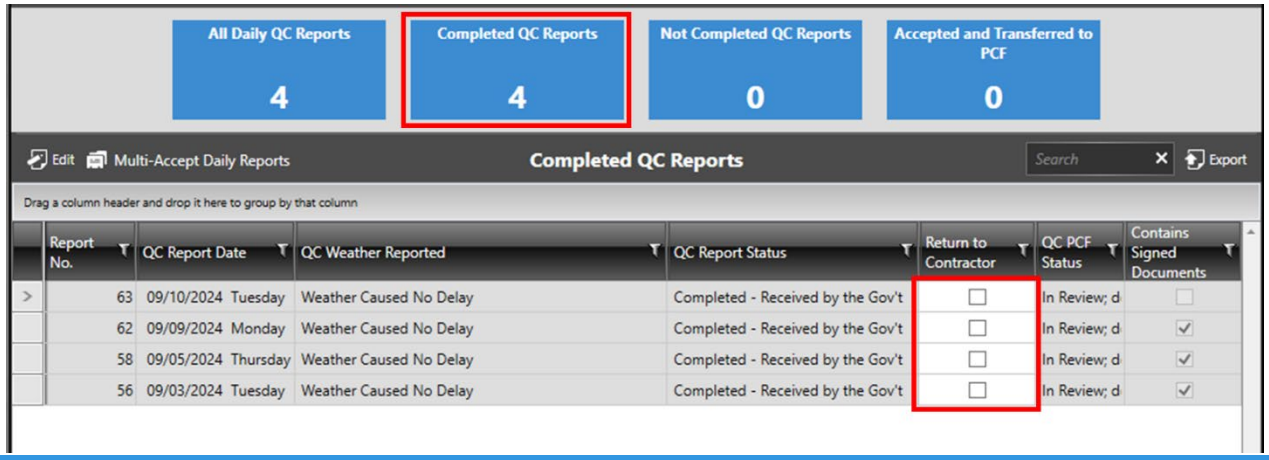
Note: Please be sure to communicate the corrections needed to the Contractor either verbally or in writing when performing a return.



7.2.2.2 Returning Multiple Reports

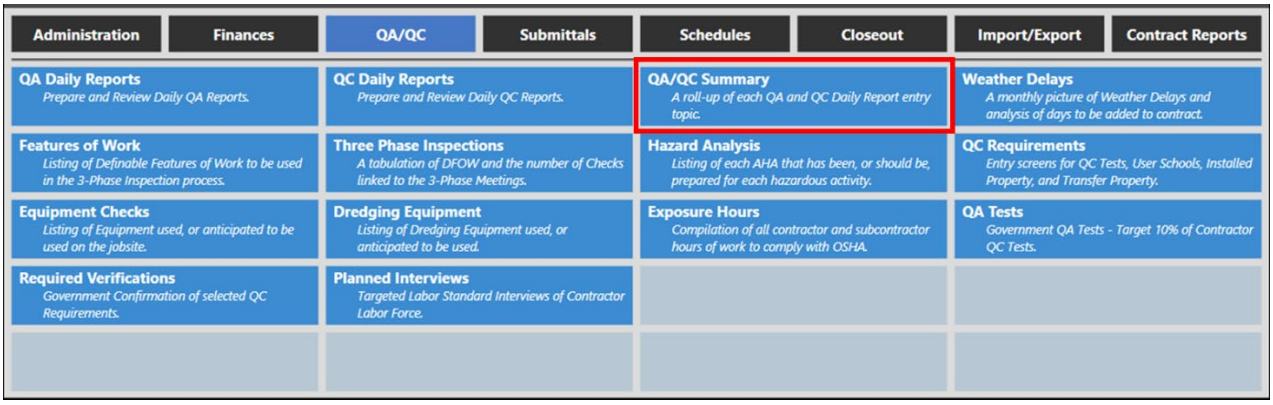
To return multiple reports for correction, click on the *Completed QC Reports* sorting option, and the *Return to Contractor* checkbox will activate.

Note: The *Return to Contractor* option is disabled in the *All Daily QC Reports* sorting option.

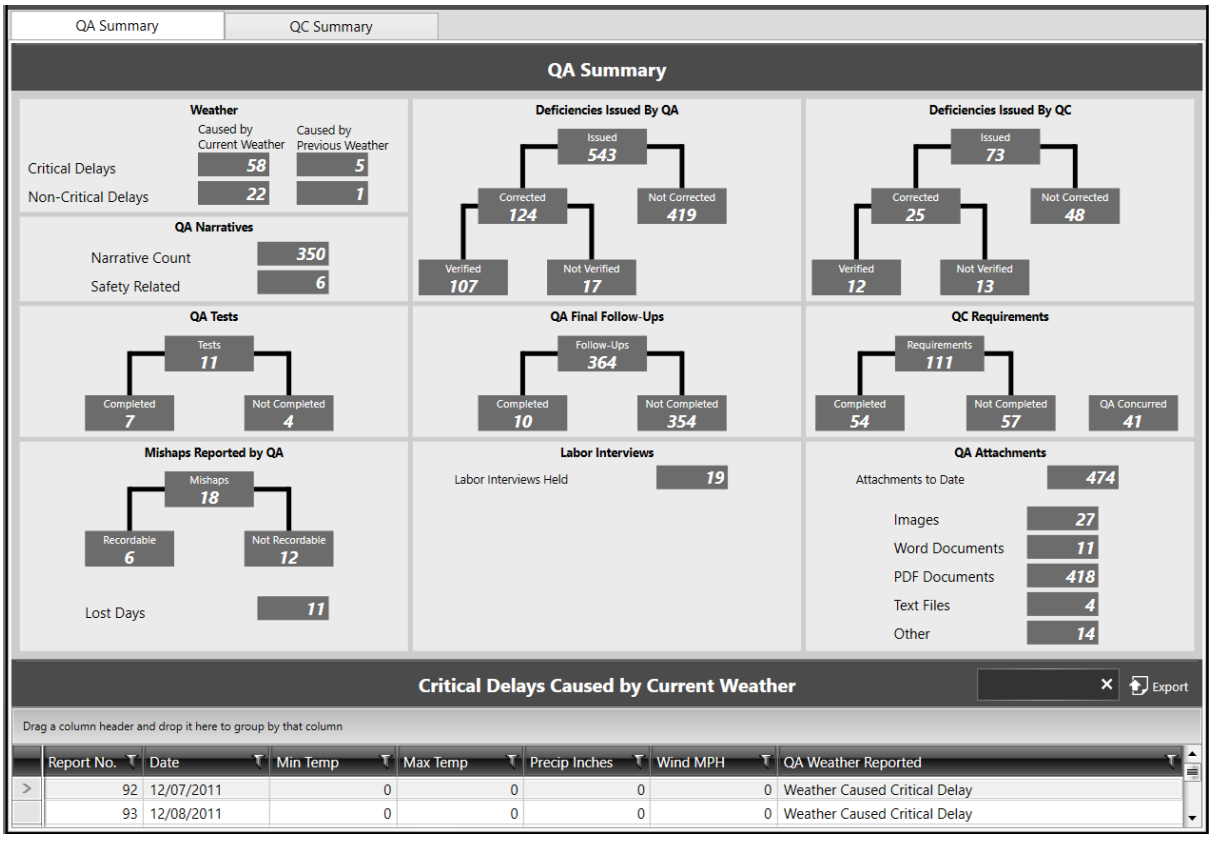


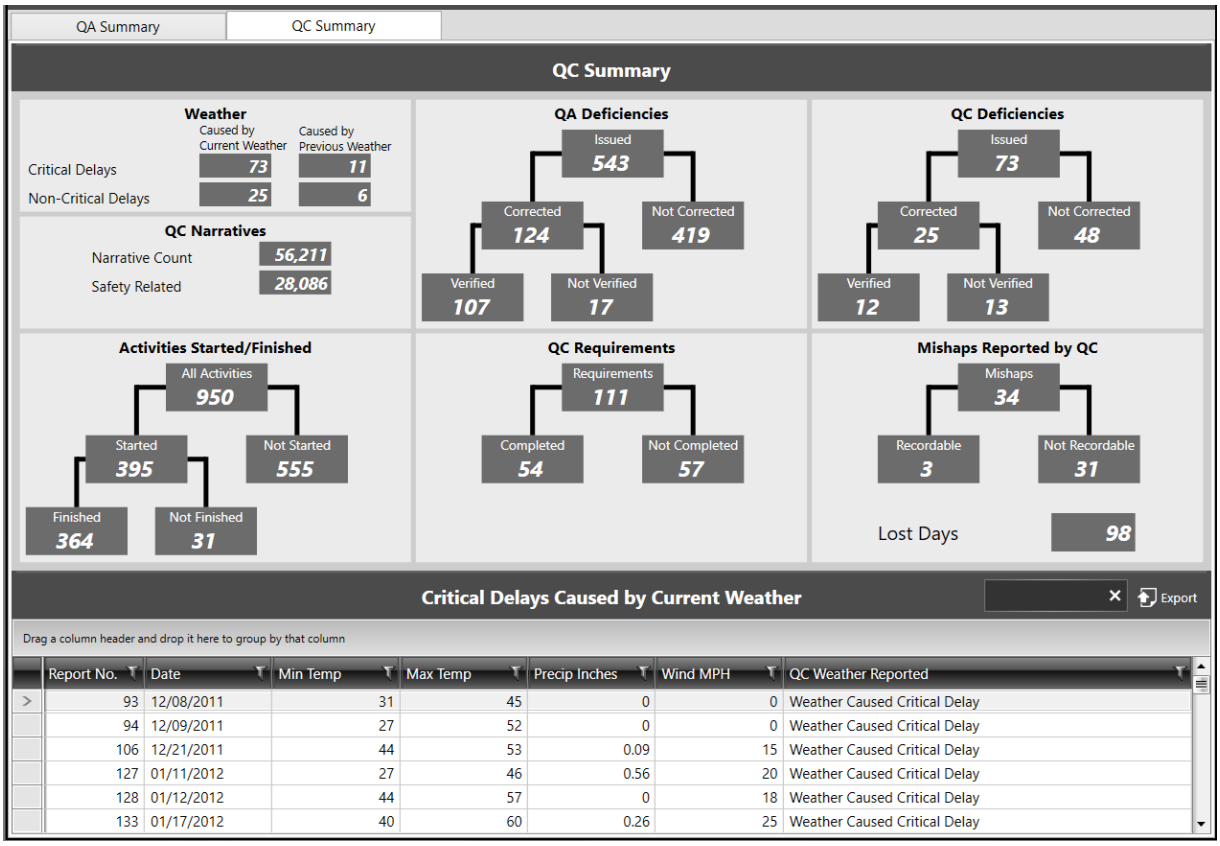
Note: As with returning a single daily report, returning multiple QC Daily Reports will also return the corresponding Document Packages for each Daily Report.

7.3 QA/QC Summary



The ***QA/QC Summary*** module is designed to provide an overall visual of all the dailies from both the QA and QC side. Each box can be clicked on, and the list below will show items in that list. For example, clicking on *Deficiencies issued by QA | Corrected* will list those 4 Corrected deficiencies below.

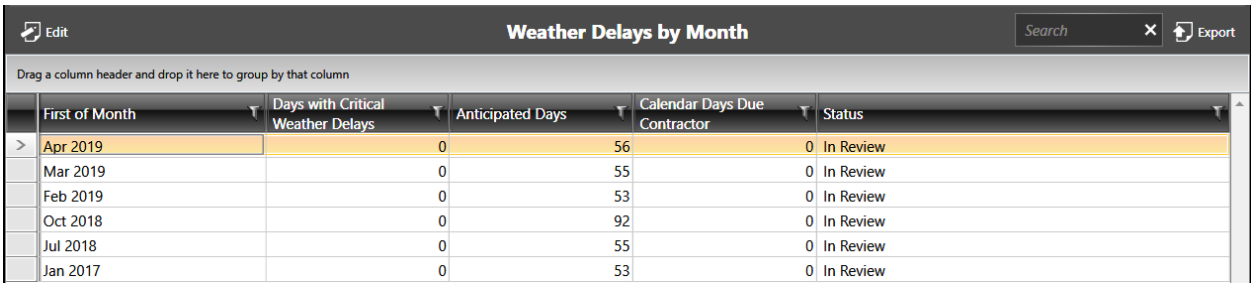




7.4 Weather Delays

The ***Weather Delays*** module presents the weather delays for the month at a glance. A Weather Delay occurs when more than 50% of a 24-hour period is unsuitable for the work in progress. In addition, severe weather, such as rain, may impact the days following the actual weather occurrence.

When the module is first opened, the users is presented with the list of all months starting from the NTP date to the current date. This list includes a summary of each month.



Edit | **Weather Delays by Month** | Search | Export

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

	First of Month	Days with Critical Weather Delays	Anticipated Days	Calendar Days Due Contractor	Status
>	Apr 2019	0	56	0	In Review
	Mar 2019	0	55	0	In Review
	Feb 2019	0	53	0	In Review
	Oct 2018	0	92	0	In Review
	Jul 2018	0	55	0	In Review
	Jan 2017	0	53	0	In Review

Days with Critical Weather Delays: is the number of days weather work was not completed due to weather.

Anticipated Days: is the number of days where it was anticipated that work would be delayed due to previous weather impacts.

Calendar Days Due to Contractor: is a calculated number based on the anticipated versus critical weather delays. It is the number of days the Contractor is due back because of unanticipated weather.

Status: **In Review** or **Review Complete**. When the Government is still analyzing or has yet to analyze the month, the status will remain **In Review**. Once the Government has completed analysis and marked the month complete, the status changes to **Review Complete**.

May 2012

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	1 Weather caused No Delay	2 Weather caused No Delay	3 Weather caused No Delay	4 Weather caused No Delay	5 Non Work Day
6 Non Work Day	7 Weather caused No Delay	8 Weather caused No Delay	9 QA: Weather caused Non-Critical Delay; QC: Weather caused No Delay	10 Weather caused No Delay	11 Weather caused No Delay	12 Non Work Day
13 Non Work Day	14 Weather caused Critical Delay; CRITICAL DELAY	15 Weather caused Critical Delay; CRITICAL DELAY	16 Weather caused No Delay	17 Weather caused No Delay	18 Weather caused No Delay	19 Non Work Day
20 Non Work Day	21 Weather caused Critical Delay; CRITICAL DELAY	22 QA: Weather caused Critical Delay; QC: Weather caused No Delay; CONFLICT RESOLVED	23 Weather caused Critical Delay; CRITICAL DELAY	24 Weather caused No Delay	25 Weather caused No Delay	26 Non Work Day
27 Non Work Day	28 Non Work Day	29 Weather caused No Delay	30 Weather caused No Delay	31 Weather caused No Delay	1	2

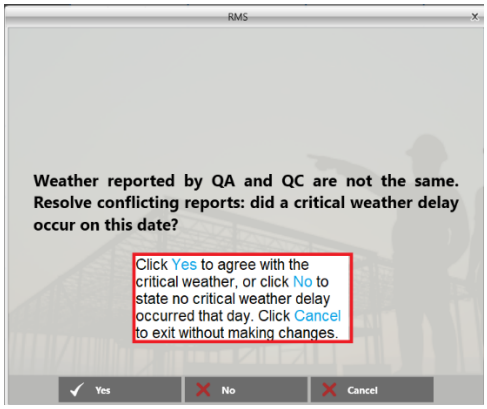
Weather Review	Work Days Due		Calendar Days Due	
○ In Review	Work Days Lost Due to Weather	4 days	Work Days Per Week	4 days
◉ Review Completed	Anticipated Work Days Lost	3 days	Weeks Due Contractor (1/4)	0.25 weeks
	Work Days Due Contractor	1 day	Calendar Days Due (0.25 x 7)	2 days

This is the view for May 2012 for a contract. It displays the comparison between the QA and QC daily reports on weather status and will display if there is any difference between the two reports.

Note: The system now allows the weather review to be completed without QA Reports.

7.4.1 Completing the Weather Delays

On the Data Grid called Weather Delays by Month, double-click on the Month Record to see a calendar view of weather recorded for each day of the month, as seen above.



Days that have entries for both the QA and QC reports showing for a single day, have different entries for the weather for that day and represent a conflict. By clicking on the unresolved item on the calendar, a message window appears asking if there was indeed a weather delay.

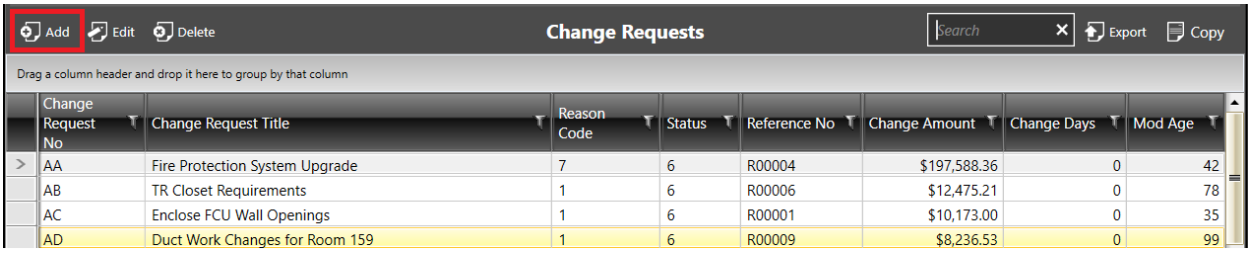
Note: both the QA and QC reports need to reflect the same information in order to complete the review of weather delays for that month.

7.4.2 Completing a Weather Delay Modification

If a weather delay results in time due to the Contractor, a weather delay modification may need to be created to increase the duration of the contract.

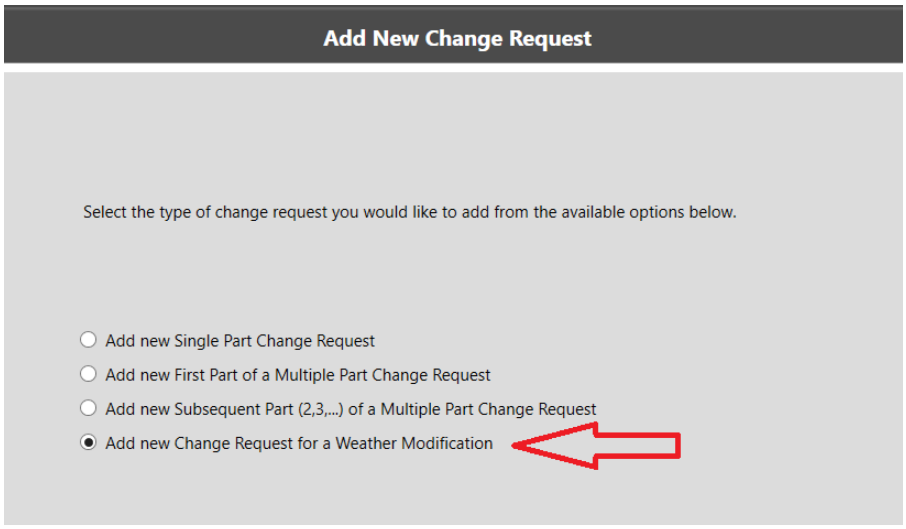
Note: The weather delay module must be completed for the month that the delay occurred in prior to the dates populating the BCD area. To edit the BCD item further, double-click on the item.

Completing a weather modification is done in two parts. The first part is creating a change request. A change request is generated in anticipation of a potential or real modification to the contract. The process generates what is known as a Basic Change Document or BCD. The BCD describes the change, the reason it is necessary, the initial estimated cost, and the time impact. The second part is creating a formal modification that may become part of the contract. To complete a weather modification, navigate to the ***Finances*** tab, then to the ***Contract Changes*** module. Click *Add*.

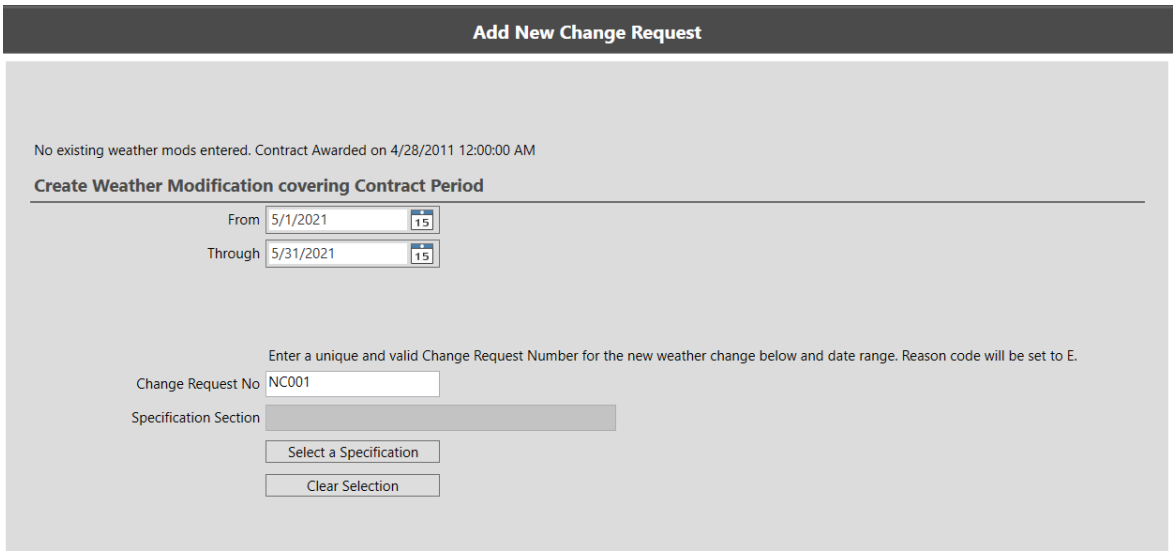


Change Request No	Change Request Title	Reason Code	Status	Reference No	Change Amount	Change Days	Mod Age
AA	Fire Protection System Upgrade	7	6	R00004	$197,588.36	0	42
AB	TR Closet Requirements	1	6	R00006	$12,475.21	0	78
AC	Enclose FCU Wall Openings	1	6	R00001	$10,173.00	0	35
AD	Duct Work Changes for Room 159	1	6	R00009	$8,236.53	0	99

This menu displays different types of change requests. Select *Add New Change Request for a Weather Modification* and click **Next**.



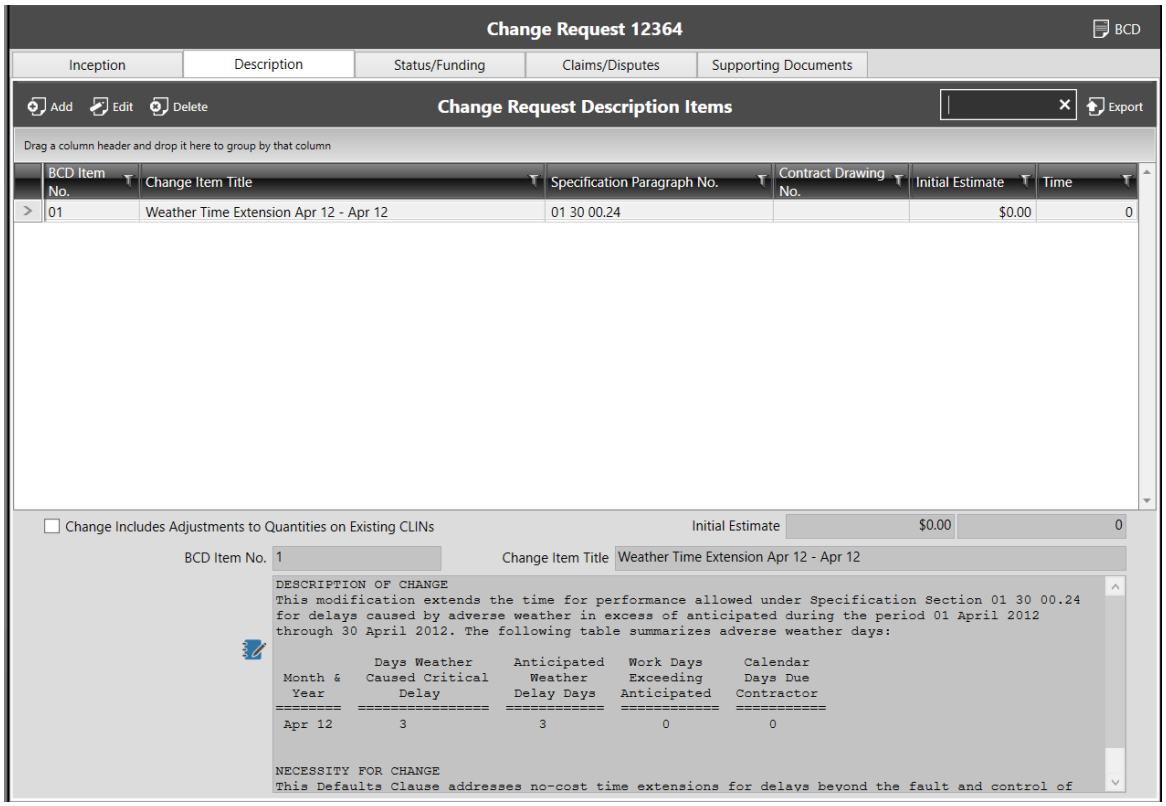
From here, choose the dates that the Weather Modification will cover for the contract period. If there were adverse weather delays in the month of January select a *From* date towards the beginning of the month and a *Through* date towards the end of the month.



Alter the change request number by typing in a unique and valid change request number in the change request number field.

The reason code will automatically be set to E, which stands for Excusable Delay for no fault. Add a specific section to reference this change request by clicking *Select a Specification* button or leave this section blank. Then click *Finish* at the bottom right of the screen.

For this type of contract change, the ***Description*** tab automatically creates a BCD item that will display a description of the change as seen at the bottom. If this table is not populating with information, most likely the weather delays for that month have not been completed yet.

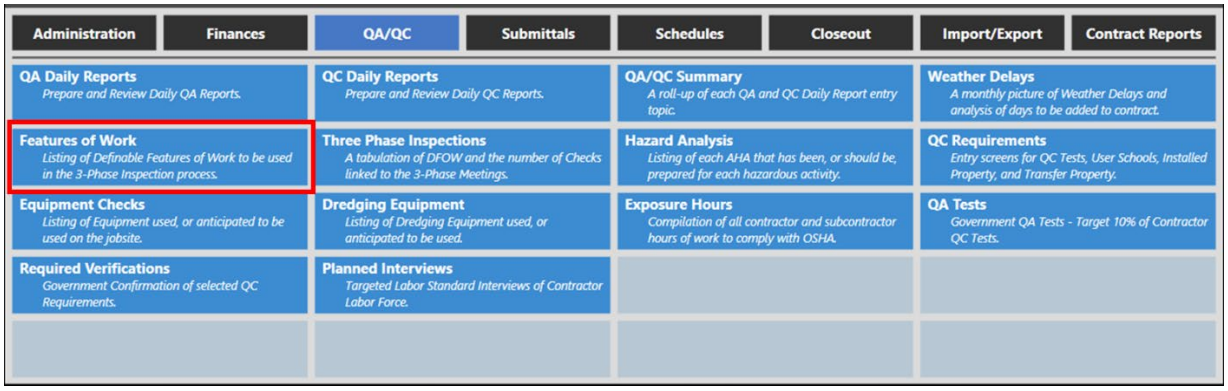


From here the user can edit the BCD item by double clicking on the item or selecting the item and clicking on the *Edit* button. Then add or subtract information, as needed.

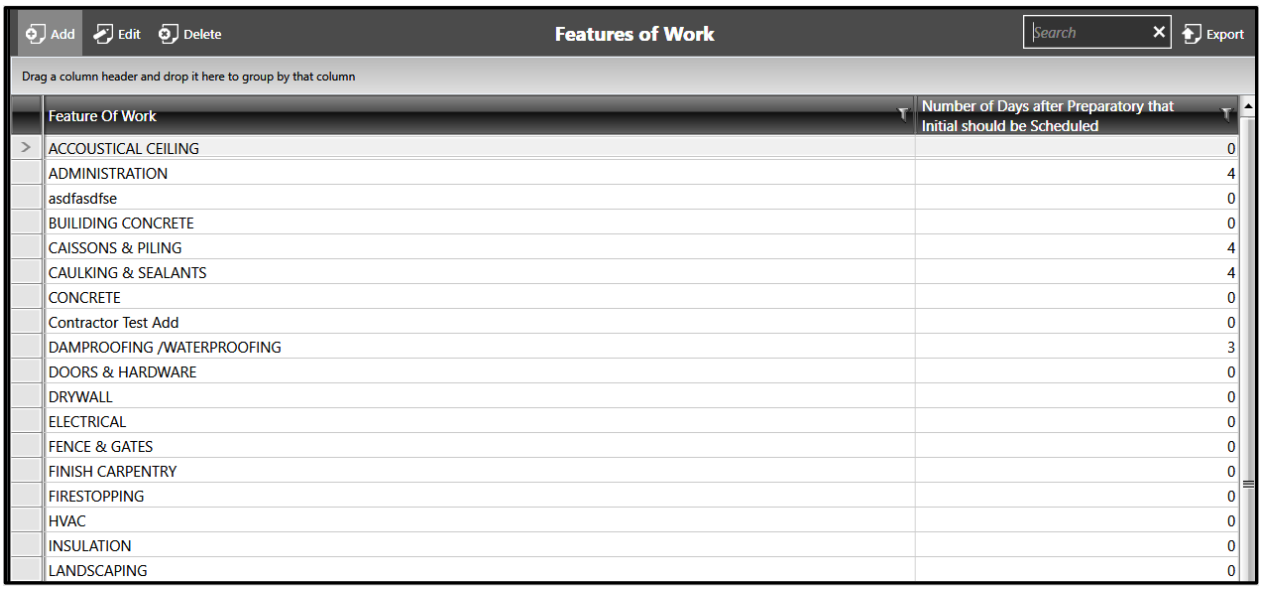
User's can also delete the BCD item by clicking on the *Delete* button, though that is not advisable for a Weather Modification.

For further instructions on completing a contract change or linking it to a modification, see sections 6.6 Contract Changes or 6.7 Contract Modifications in Volume II of the Government manual.

7.5 Features of Work

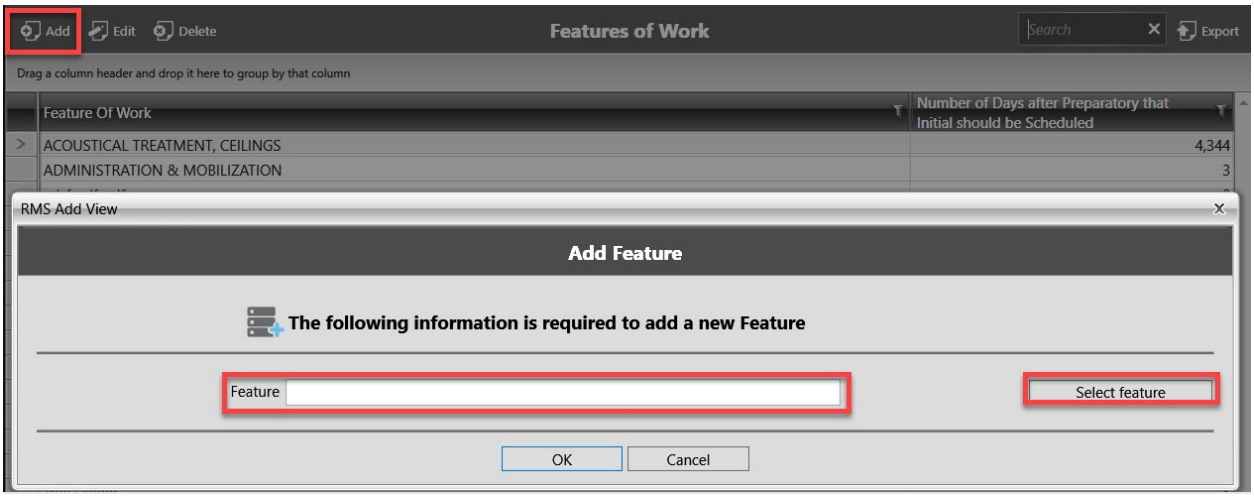


In accordance with the terms of the contract, the Definable Features of Work are required to be listed in the Contractors' Quality Control Plan. Using RMS to create that list is an easy way for the Contractor to meet these requirements. However, even more importantly, Features of Work are tied to the Contractor's pay activities providing both the Government and the Contractor invaluable information.



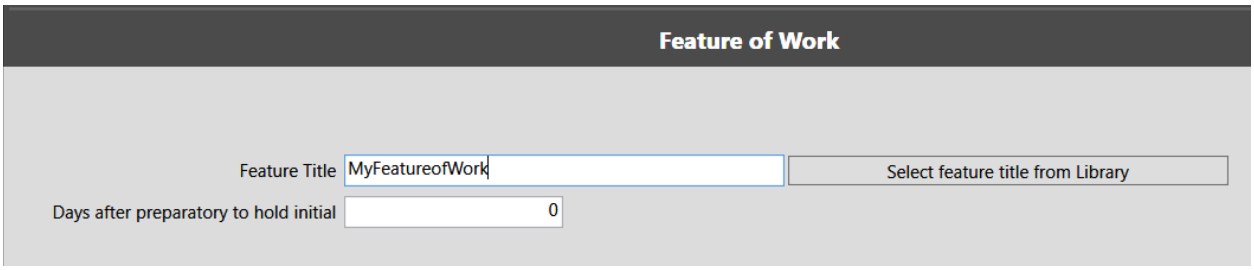
Press the *Add* button to create each *Feature of Work*. Then, enter the data in the pop-up screen by using the lookup provided, or by typing directly into the cells. Close the window when completed and repeat as needed.

Adding a feature of work:



Note: Users can either enter the Feature of Work manually, by selecting from a library of pre-entered features of work or the Features of work (FOW) can be imported in bulk via the SDEF file by entering up to 30 characters into the DESCRIPTION of the FOW activity code in the scheduling software. If NAS/SDEF import is not being used, then Features of Work can be manually entered directly in RMS.

Once a title is entered – the Feature Edit Screen allows entry of a count of days to hold initial preparatory:



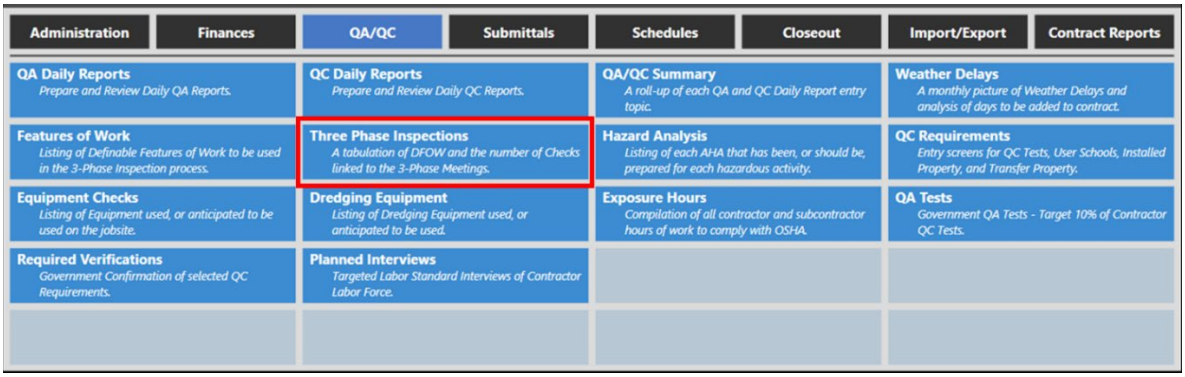
The planned number of days between the Preparatory and Initial Inspection should be carefully selected. The Initial Inspection always takes place following the Preparatory Inspection, but AFTER a representative sample of the work has been placed. This is to ensure that the quality and workmanship reflect the agreements reached and discussions that took place during the Preparatory Inspection meeting.

Features of Work are general categories of construction work that are referenced in the contract specifications. A feature can be thought of as a phase of work requiring a separate Preparatory Inspection (typically, there is at least one for every technical specification section, with many sections having multiple features).

Within RMS, Features of Work are tied to 3-phase inspection checks. As such, Features of Work are an integral part to the power of the RMS Inspection Check sheets and should be thought through quite carefully.

> *Note*: Feature type is user defined. This is not predefined by the system. It is very important that both the Government and Contractor use a uniform description of the work described under each Feature type. This will help to remove any confusion of descriptions listed on reports and checks.

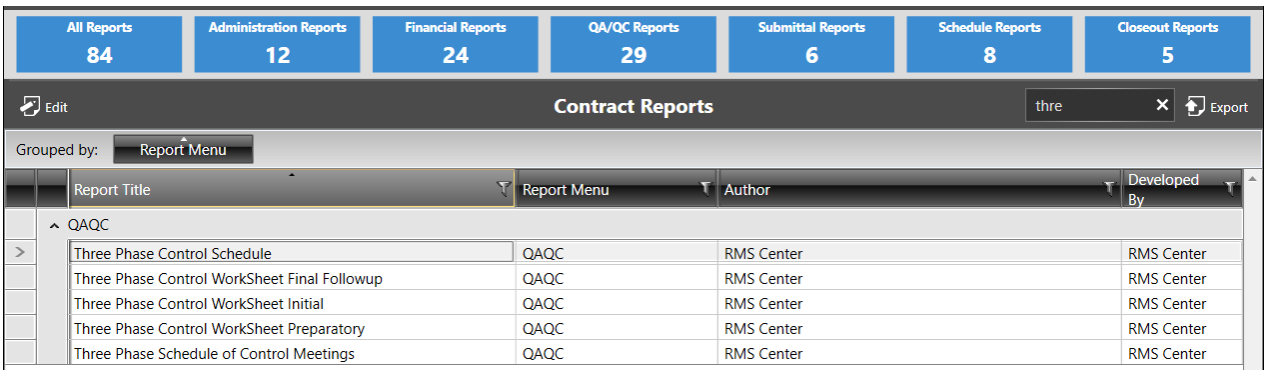
7.6 Three Phase Inspections



As part of the Contractor's QC Plan, Definable Features of Work for a construction contract are identified by the Contractor to plan Preparatory, Initial and Follow-Up inspections of the work. These planned inspections are then used to create the Feature Schedule for a contract. To set the Feature Schedule, the Contractor must enter the schedule dates for each type of inspection related to a Features of Work using this, Three Phase Inspections module.

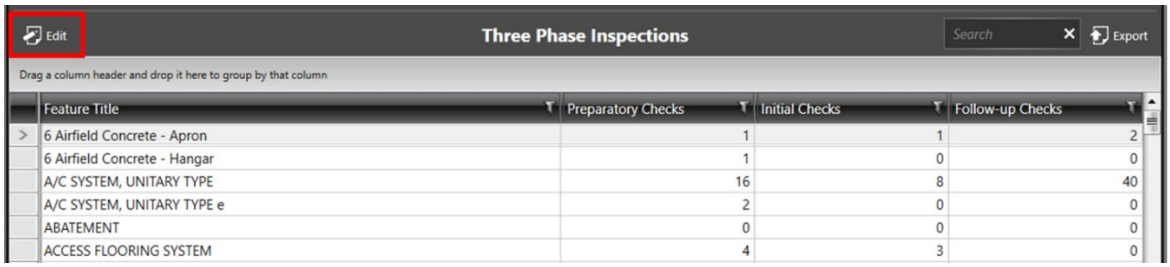
Most construction contracts (even those with 1000's to tens of 1000's of work activities) have fewer than 30 features of work. This rolled up feature schedule makes an excellent schedule for easily monitoring the progress on a contract. The customers find this schedule very easy to understand.

This section can also be used to help build an agenda of items to talk about during the Preparatory, Initial and Final Follow Up meetings for each Feature of Work, depending on district policy. Once data is entered into this module, there are multiple reports that users can use to assist with planning meeting agendas.

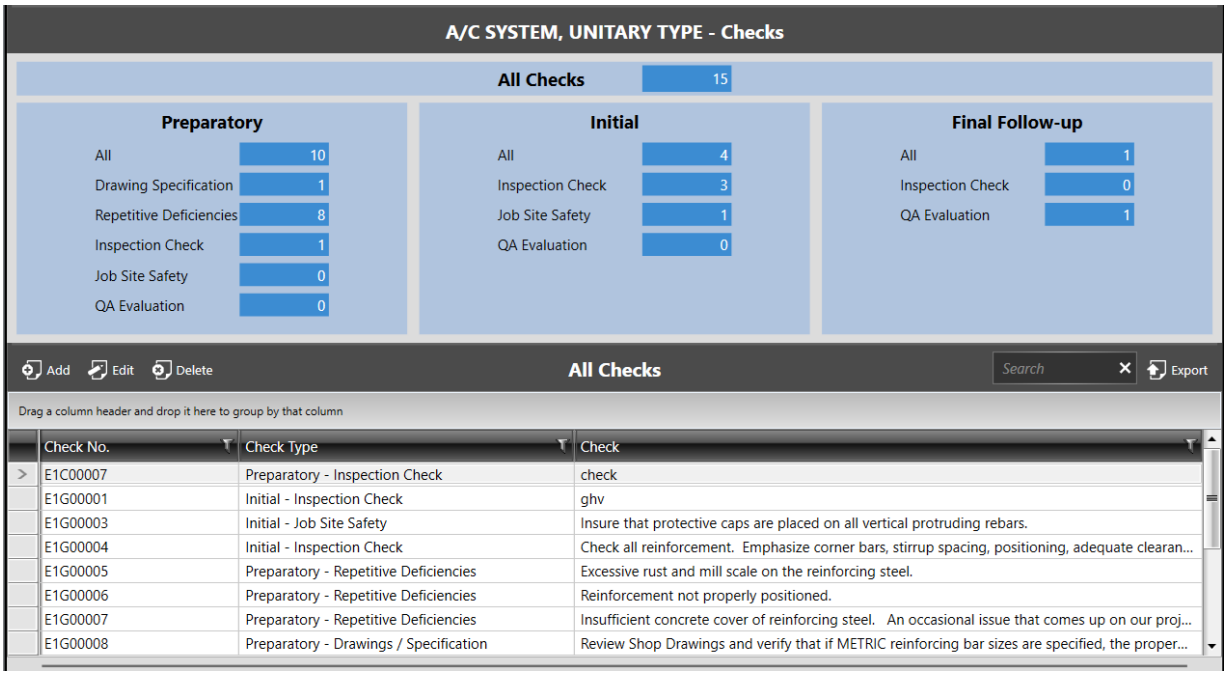


Select a Feature Title and click *Edit* to setup or edit a Feature of Work's Preparatory, Initial, or Follow-Up Checks:

Note: If there are no Features listed in this module, the Contractor will need to enter those using the ***Features of Work*** module.

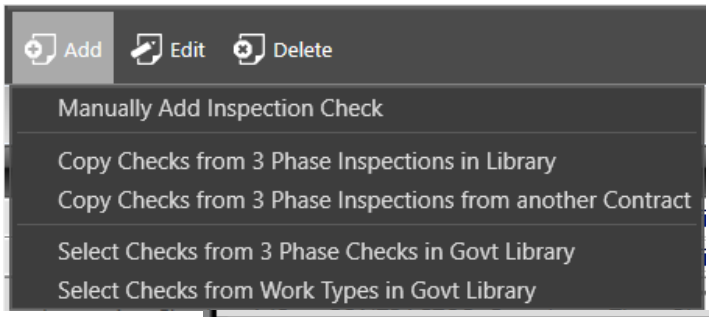


The Three Phase Inspections Checks Edit View will then display as shown below.

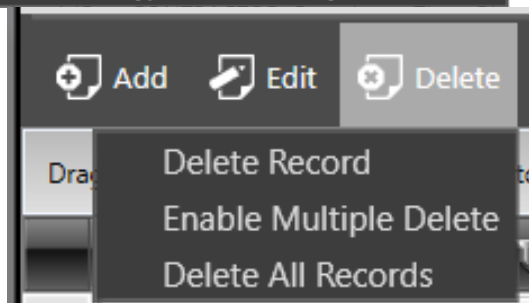


Use the sort tiles at the top to view the different types of checks associated with the previously selected **Feature**.

To add a check, click the *Add* button. Users can choose from adding an item manually, where a custom Check Type can be used, or copy checks from other locations, as shown on the right.



To delete a check, select the check to be deleted and click on *Delete*.

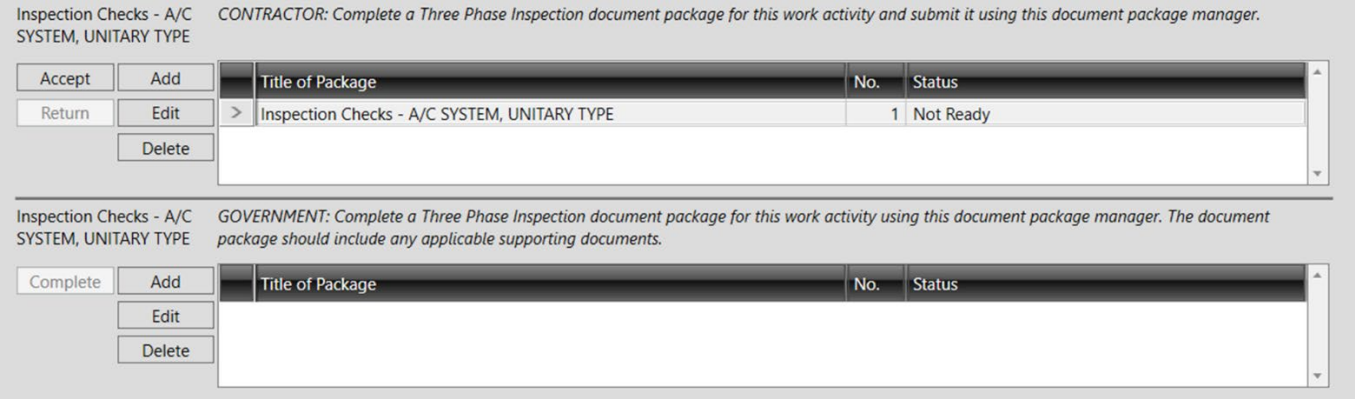


Select *Delete Record* to only delete a single check. Select *Enable Multiple Delete* to delete more than one check at a time.

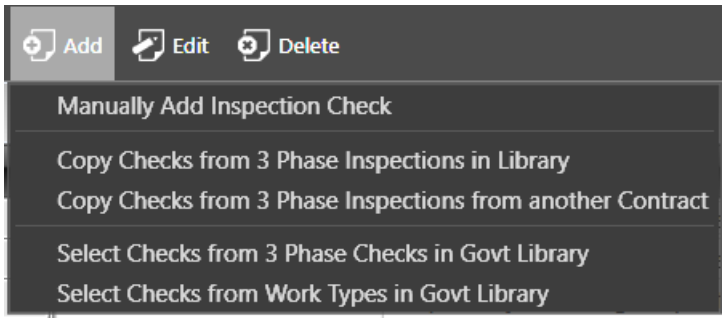
Select *Delete All Records* to delete all checks. **Use extreme caution when using this, and only perform this action after verifying that it should be performed.**

Double clicking on the check type or selecting it and clicking on *Edit*, will allow users to update the information that is displayed in the *Check* column.

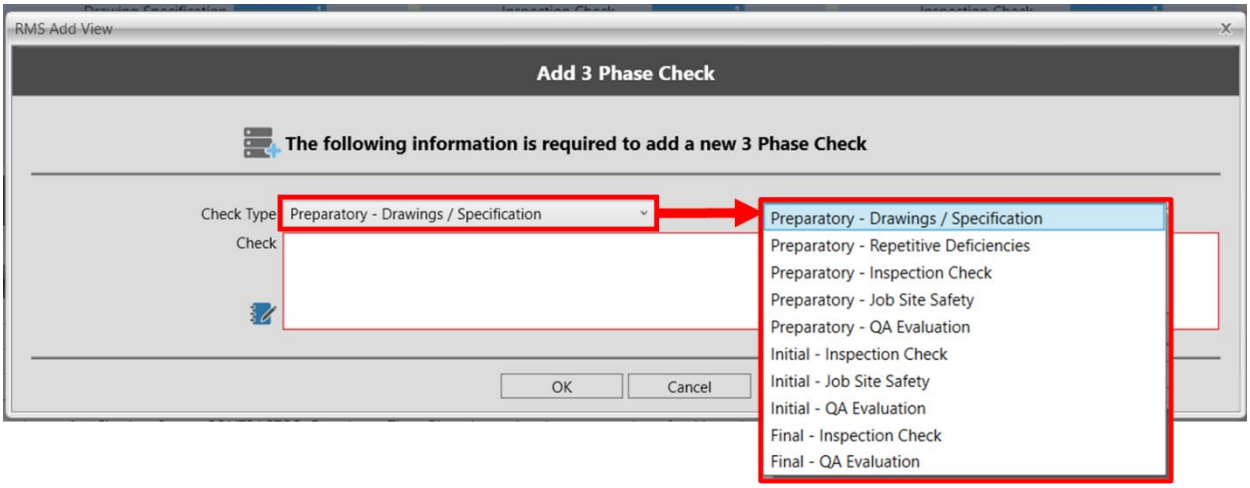
At the bottom of the screen, there is a Contractor Document Package and a Government Document Package for attachments.



Note: Checks can be sorted by All Checks, Preparatory, Initial, or Final Follow-Up and even then further filtered down based on check type.

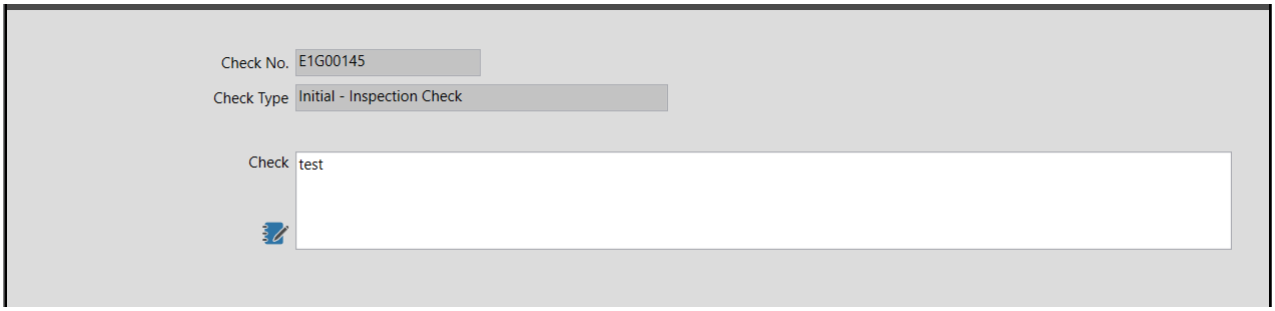


Adding a check allows users to manually add inspection checks and copy from libraries or from another contract. If adding the check manually, select the *Check Type*, enter a title for the check in the *Check* text box, and click *OK*.

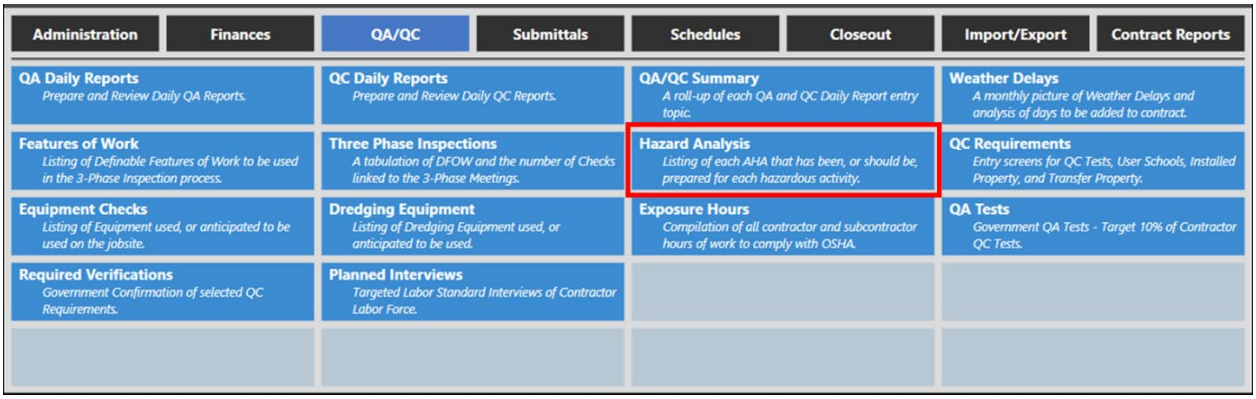


Note: Usually, the Contractor enters this data in Contractor Mode.

To edit a check, select the check and click on the *Edit* button. The *Check* text box will be editable.



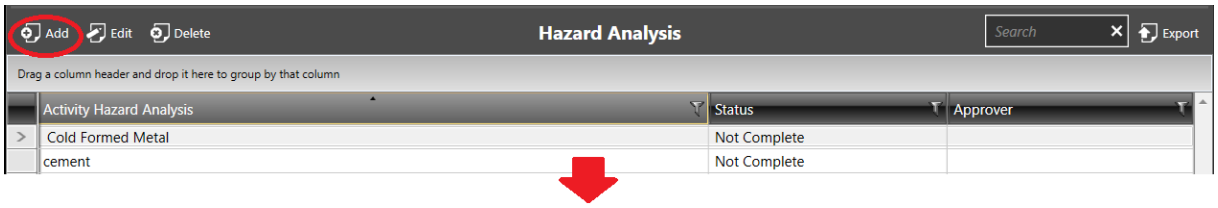
7.7 Hazard Analysis

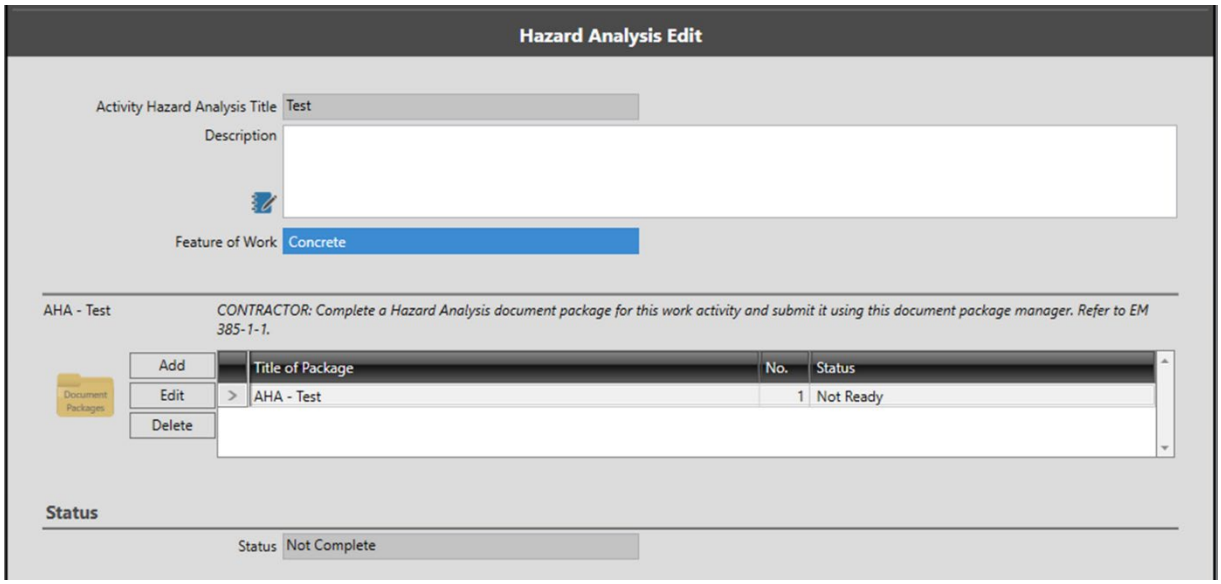


The ***Hazard Analysis*** module is used to record descriptions of hazards and the related work activity. The Activity Hazard Analysis (AHA) defines the work sequence, anticipated hazards, conditions, equipment, materials, personnel, and the control measures to be implemented to eliminate or reduce each hazard to an acceptable level of risk and assigns a Risk Assessment Code for each step. The USACE uses the AHA as part of a total risk management process.

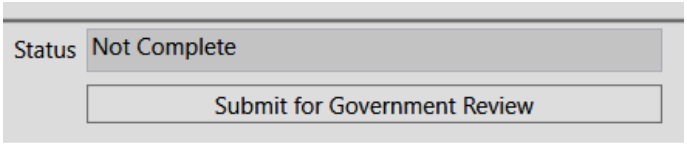
As required by EM 385-1-1, Safety and Health Requirements Manual, detailed project-specific hazards and controls must be provided in AHAs for each Definable Feature of Work (DFOW). No work can begin on a DFOW until the initial AHA has been accepted by a responsible Government safety representative addressing project-specific hazards and discussed with all engaged in the activity, including the Contractor, and subcontractor(s) performing the particular DFOW, and Government on-site representatives at preparatory and initial control phase meetings.

If a Hazard Analysis only needs to be edited, select an item, and click the *Edit* button. If deleting a Hazard Analysis, select an item, and click the *Delete* button.

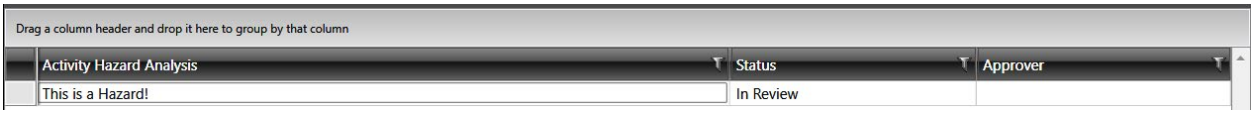




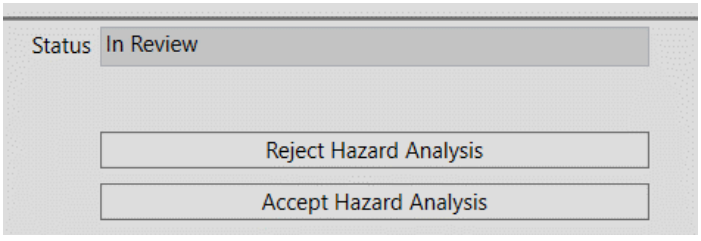
The *Status* field is inactive because this field is updated by the system as the item is moved throughout the submission process (submitted to the Government, rejected/approved by Government, etc.). The Contractor will see this in Contractor Mode:



Once the Hazard Analysis is submitted, the Government will see AHA in the ***Hazard Analysis*** module with the status of *In Review*.

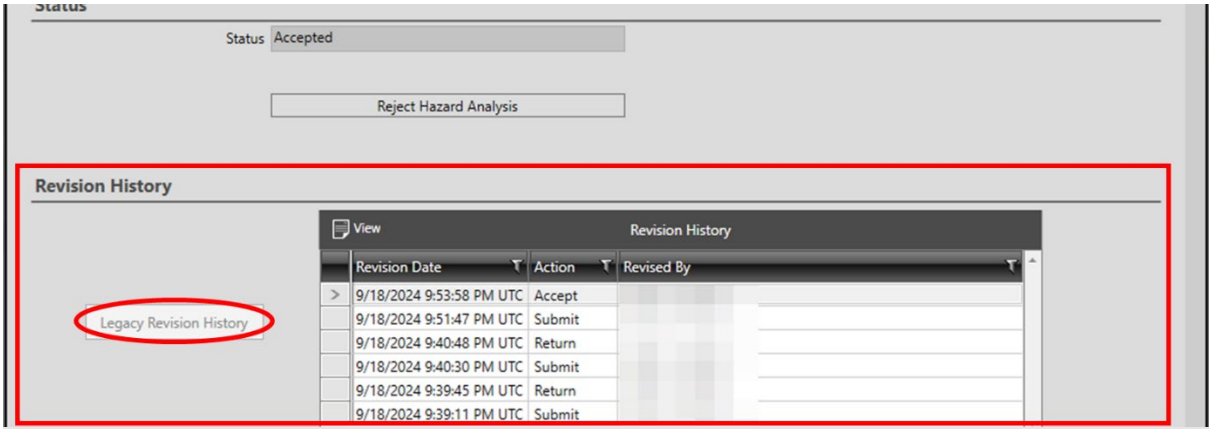


Upon receipt of an AHA, the Government will review and determine whether to accept or reject the specific hazard analysis by using the *Reject Hazard Analysis* and *Accept Hazard Analysis* buttons.



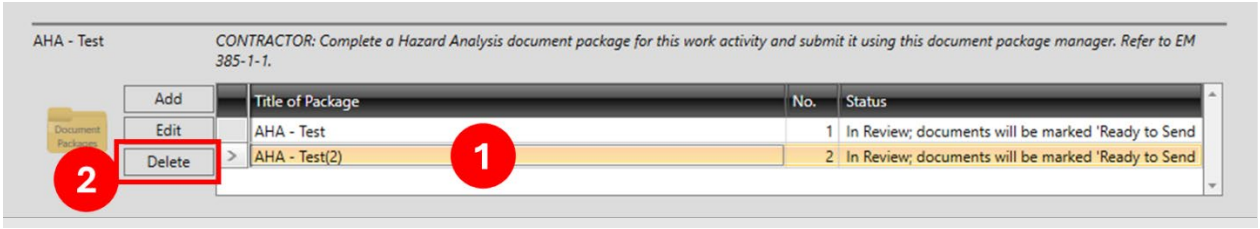
Regardless of which button is clicked, revision history for the item will be recorded in the *Revision History* table along with the name of the user who made the update when any action is taken on the acceptance or rejection of the AHA. To view a revision entry, select the line and click on the *View* button or double click on the revision entry to open.

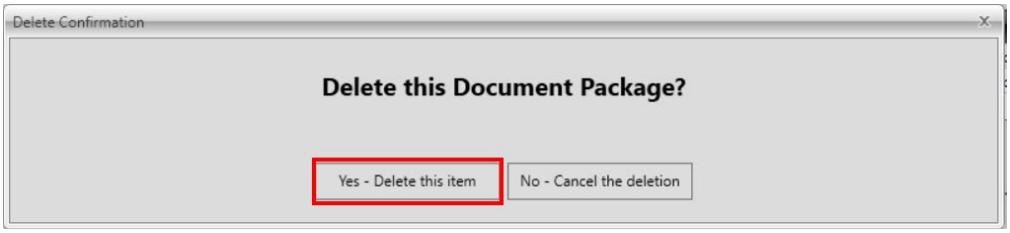
Note: The *Legacy Revision History* button will be available to view revision history information present on screens for AHAs created and/or edited before the release of patch 491 on July 25, 2024.



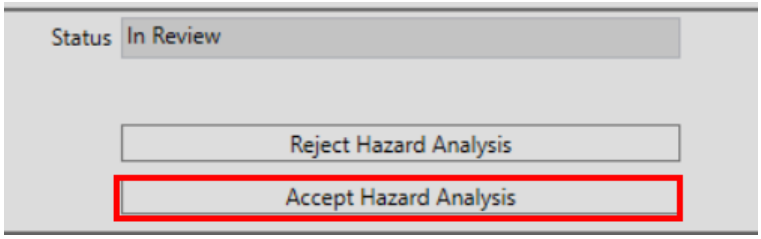
When an AHA is rejected by the Government, the status of both the AHA and the associated Document Packages will update to *Returned for Corrections*.

If the documents within the previously rejected Document Package do not need to go to PCF, then single click on the package to select it and click *Delete*. RMS provide a prompt to confirm deletion.

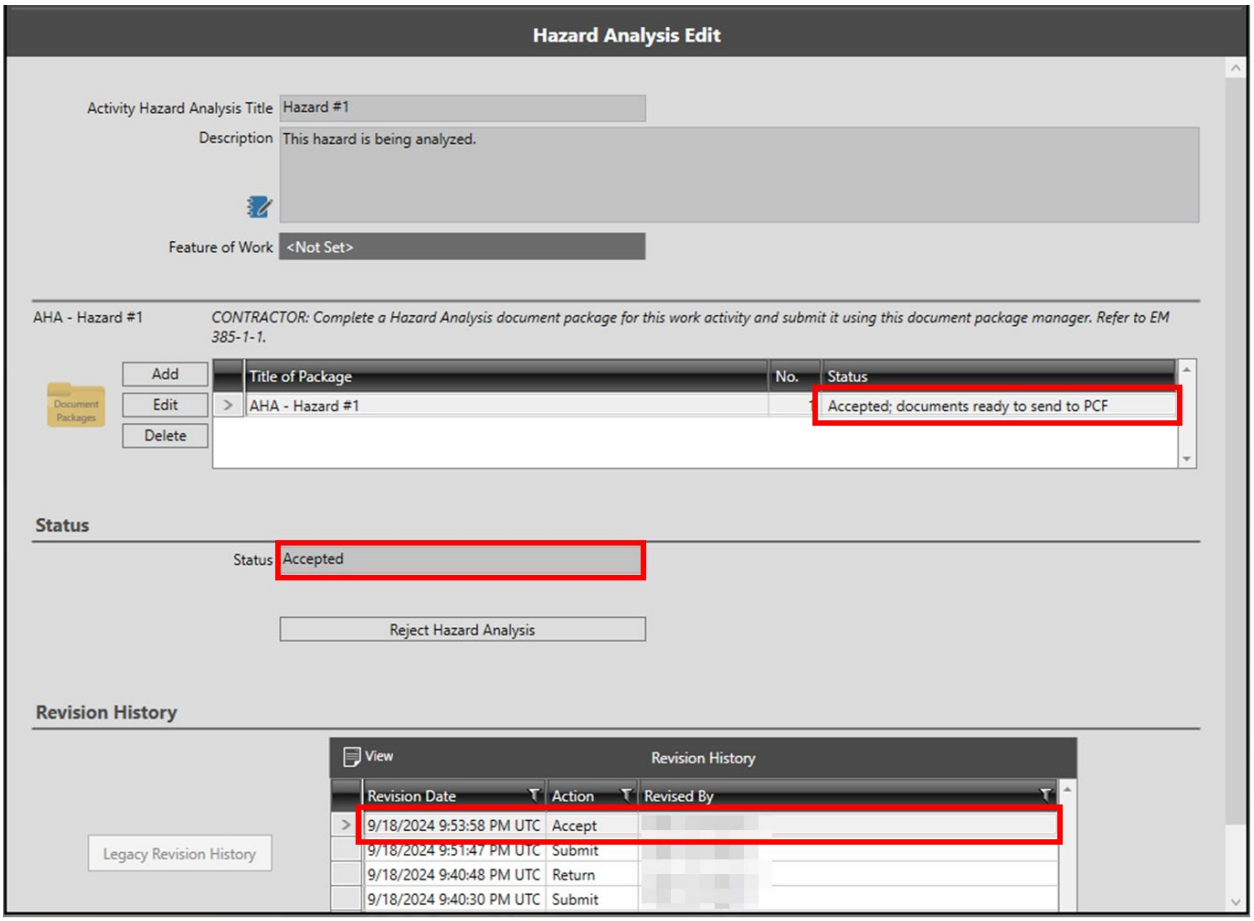




If the AHA is considered acceptable, then click *Accept Hazard Analysis* to accept and complete the AHA along with any associated Document Packages.



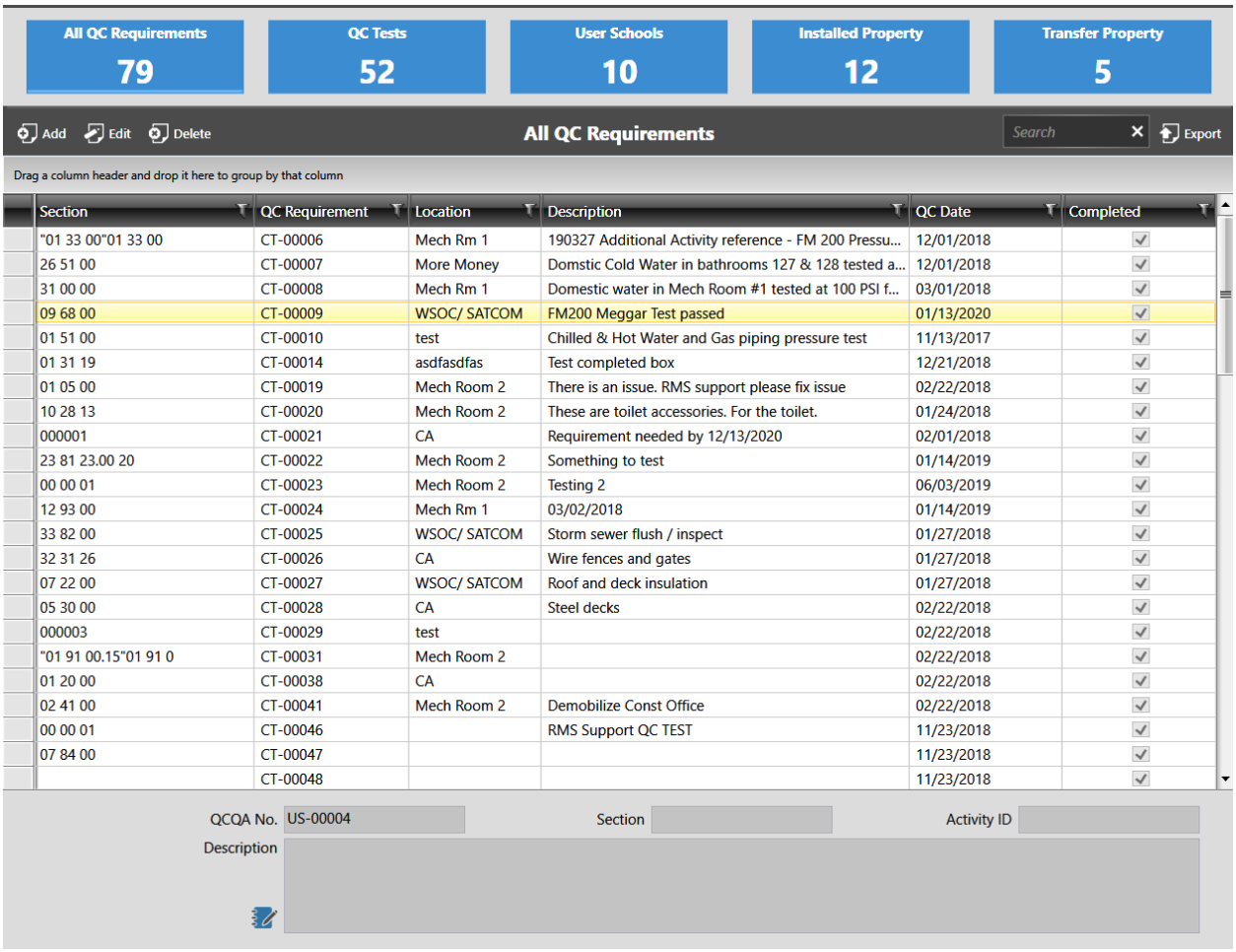
The *Status* for both the AHA and all associated Document Packages will update to reflect acceptance, and an Accept revision entry will be stored in the *Revision History* table.



Click the *Back* to exit the view.

7.8 QC Requirements

QC Requirements is the collective term given to contract requirements for QC Tests, User Schools, Installed Property and Transfer Property. The Contractor is responsible for developing complete lists of all these requirements and inputting these into RMS. The requirements are usually found in the specifications and will require a careful reading of the specifications to identify the complete list of QC Requirements.



Section	QC Requirement	Location	Description	QC Date	Completed
"01 33 00"01 33 00	CT-00006	Mech Rm 1	190327 Additional Activity reference - FM 200 Pressu...	12/01/2018	☑
26 51 00	CT-00007	More Money	Domstic Cold Water in bathrooms 127 & 128 tested a...	12/01/2018	☑
31 00 00	CT-00008	Mech Rm 1	Domestic water in Mech Room #1 tested at 100 PSI f...	03/01/2018	☑
09 68 00	CT-00009	WSOC/ SATCOM	FM200 Meggar Test passed	01/13/2020	☑
01 51 00	CT-00010	test	Chilled & Hot Water and Gas piping pressure test	11/13/2017	☑
01 31 19	CT-00014	asdfasdfas	Test completed box	12/21/2018	☑
01 05 00	CT-00019	Mech Room 2	There is an issue. RMS support please fix issue	02/22/2018	☑
10 28 13	CT-00020	Mech Room 2	These are toilet accessories. For the toilet.	01/24/2018	☑
000001	CT-00021	CA	Requirement needed by 12/13/2020	02/01/2018	☑
23 81 23.00 20	CT-00022	Mech Room 2	Something to test	01/14/2019	☑
00 00 01	CT-00023	Mech Room 2	Testing 2	06/03/2019	☑
12 93 00	CT-00024	Mech Rm 1	03/02/2018	01/14/2019	☑
33 82 00	CT-00025	WSOC/ SATCOM	Storm sewer flush / inspect	01/27/2018	☑
32 31 26	CT-00026	CA	Wire fences and gates	01/27/2018	☑
07 22 00	CT-00027	WSOC/ SATCOM	Roof and deck insulation	01/27/2018	☑
05 30 00	CT-00028	CA	Steel decks	02/22/2018	☑
000003	CT-00029	test		02/22/2018	☑
"01 91 00.15"01 91 0	CT-00031	Mech Room 2		02/22/2018	☑
01 20 00	CT-00038	CA		02/22/2018	☑
02 41 00	CT-00041	Mech Room 2	Demobilize Const Office	02/22/2018	☑
00 00 01	CT-00046		RMS Support QC TEST	11/23/2018	☑
07 84 00	CT-00047			11/23/2018	☑
	CT-00048			11/23/2018	☑

QC Requirements are broken down into the following categories. Select the corresponding blue tile at the top of the screen to filter the list shown in the selection view.

QC Tests are numbered CT-#####. The need for specific QC Tests is identified in the specifications. Testing requirements can usually be found in Part 3 - Execution of a specification. It is the Government's responsibility to verify that the Contractor has developed a complete list of all QC tests and enter it in RMS, those required by the contract, as well as those used to ensure a quality product.

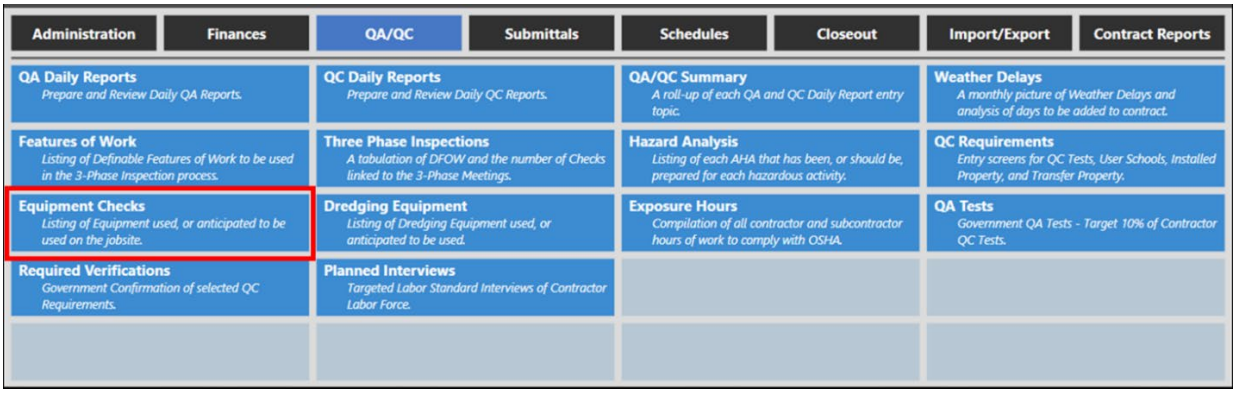
User Schools are numbered US-#####. User Schools are the training or instruction provided to the Customer on equipment or systems provided and installed as part of the contract. As each training or instruction session is completed, report it on the QC Daily Report. A USACE Representative should ensure that it was accomplished appropriately and if not, have it repeated to comply with the contract documents.

Installed Property item are numbered IP-#####. Installed property is equipment that is permanently installed/ attached to a facility. These are typically equipment that have serial numbers, require maintenance, and are discrete entities. As installed property arrives at the jobsite, compare it to approved shop drawings for conformance to the contract and record the manufacturer, serial number, and other maintenance- related information.

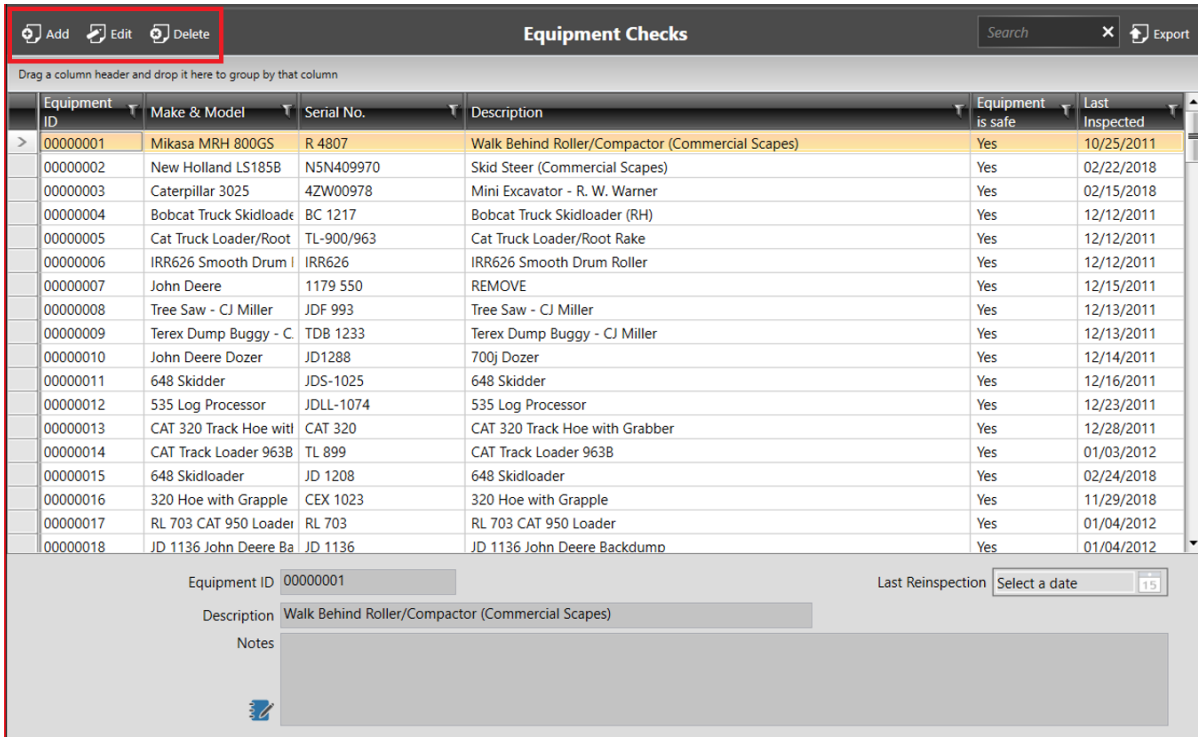
Transfer Property items are numbered TP-#####. Transfer property is property that "changes hands" during the construction process. Examples include Government Furnished Property (GFP) that is installed or used during performance of the contract. It also includes spare parts and

supplies that are furnished by the Contractor and turned over to the Government as part of the contract requirements. It could also include equipment or materials that were deleted by contract modification and the Government decided to retain possession rather than take a monetary credit. The Government should be preparing a DD Form 1149 transfer document to include with other closeout documents.

7.9 Equipment Checks



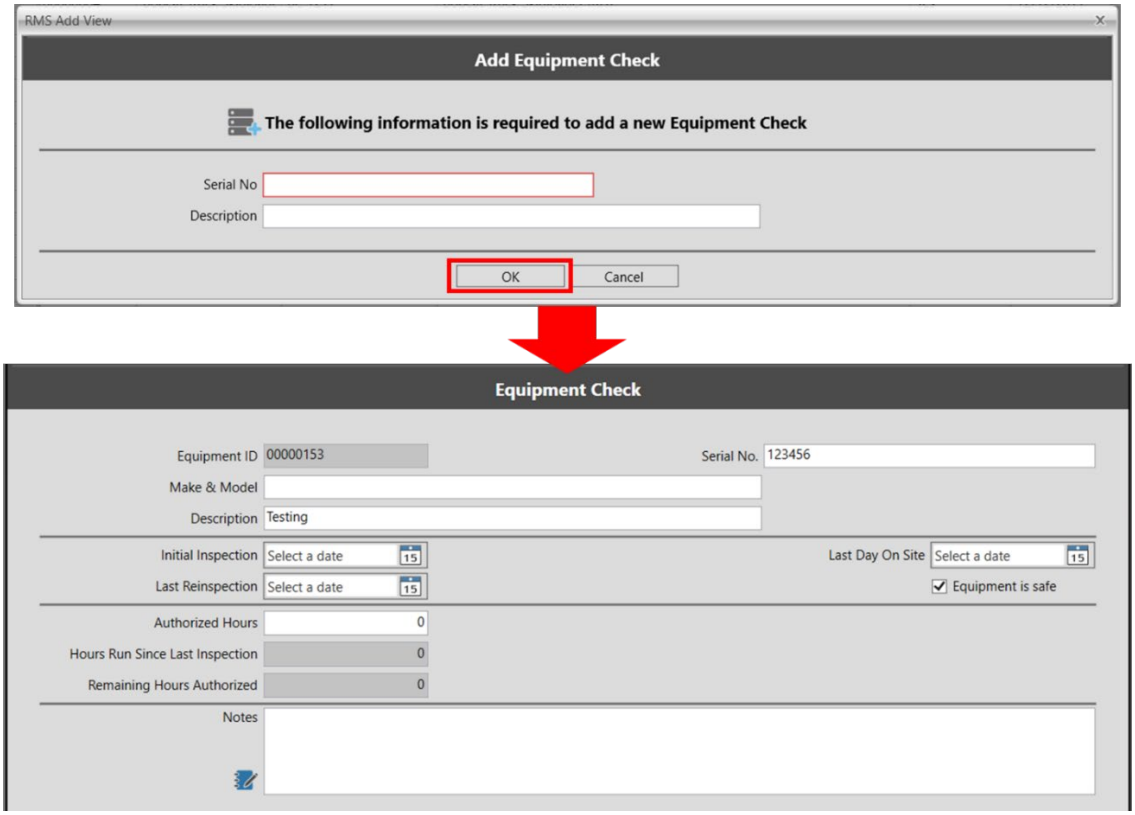
All equipment that requires a mechanic's inspection should be identified in this section. There are multiple benefits to entering this equipment and the associated information in RMS, especially when experiencing delays that could result in claims against the Government. By identifying equipment, RMS can assist in keeping track of inspection dates, usage, and other information, including safety.



7.9.1 Adding Equipment Checks

Click on the *Add* button in the top left of the view. Then enter the equipment's serial number/vehicle identification number and a brief description of the equipment (75-character limit), then click on *OK*.

Note: *Serial No.* are a unique number and RMS will not allow for it be entered twice.



Equipment ID: Equipment is automatically numbered sequentially by RMS as equipment is added.

Serial No: Enter the equipment's unique identification number that will distinguish it from all other similar equipment. This may be the equipment's VIN or a company-assigned identification number.

Make & Model: Enter the equipment's make and model.

Description: Enter a brief description of the equipment (75-character limit).

Initial Inspection: Enter the date on which the equipment was first inspected for this contract.

Last Reinspection: Enter the date on which the equipment was last inspected for this contract.

Last Day on Site: Enter the date on which the equipment was last present at the worksite, i.e., the date on which it was removed from the worksite.

Equipment is safe: Check this box if the equipment is safe to use for its intended purpose. Do not falsely check this box if there is any defect that could be considered a safety concern.

Authorized Hours: Enter the number of hours which the equipment can be safely used before it must be inspected again.

Hours Run Since Last Inspection: The number of hours that the equipment is used is entered on the QC Daily Report (Section 7.3) RMS will maintain a running total here based on the hours logged on the QC Daily Report since the last reported inspection date.

Remaining Hours Authorized: This number is automatically calculated by RMS using usage information logged on the QC Daily Reports. It is the difference between Authorized Hours and Hours Run Since Last Inspection.

Notes: Enter any other information related to the equipment.

> *Note:* This data entry screen can also be accessed through QC Daily Report when logging equipment usage hours. Click on the *Back* button when done.

7.9.2 Editing Equipment Checks

To edit, single click the item to edit and then click the *Edit* button or double click on the item that needs to be edited. All areas that are not greyed out can be edited in the edit view that displays. Click the *Back* button to save the information.

7.9.3 Deleting Equipment Checks

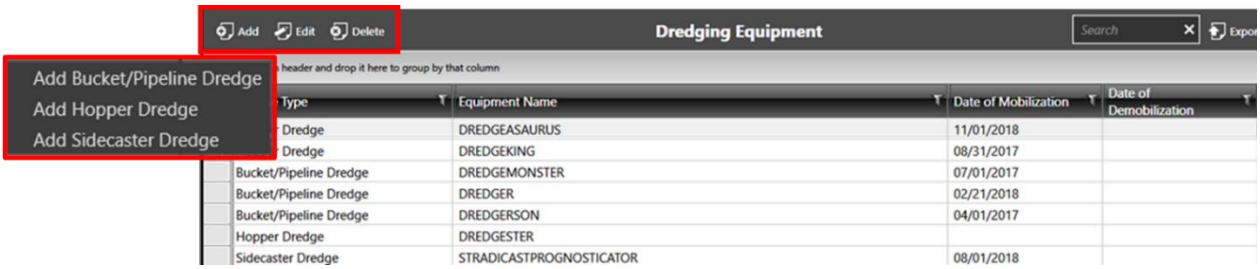
To delete, single click on the item to delete and click on the *Delete* button. Then confirm deletion.

Do not use this module to enter information on dredges. Use the ***QA/QC | Dredging Equipment*** module for that purpose.

> *Note*: The Contractor usually enters data in this module. See the CM Manual for more information.

7.10 Dredging Equipment

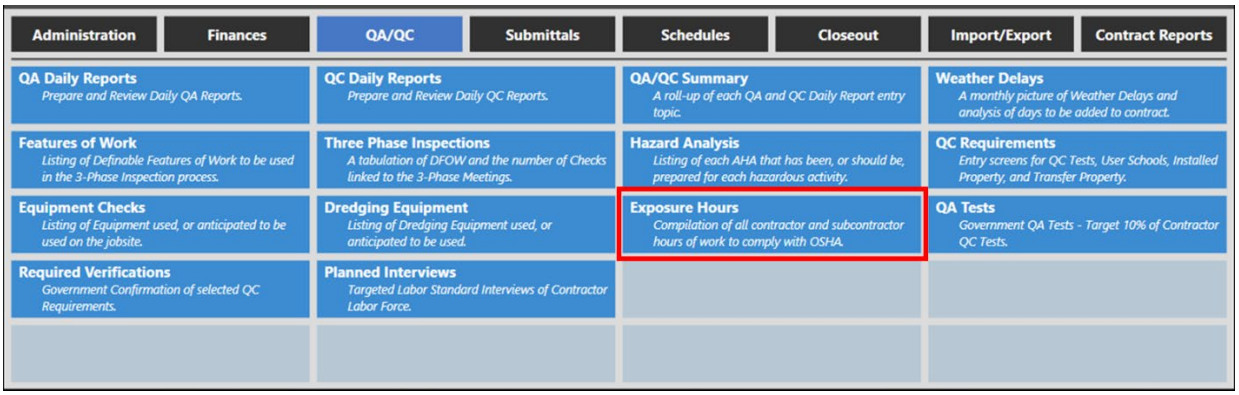
Use this module to enter information on equipment used to perform dredging. A dredge is any device, machine, or vessel that is used to excavate and remove material from the bottom of a body of water. Scows, barges, and other vessels that are not used to excavate and remove material from the bottom of a body of water are referred to as attendant plants.



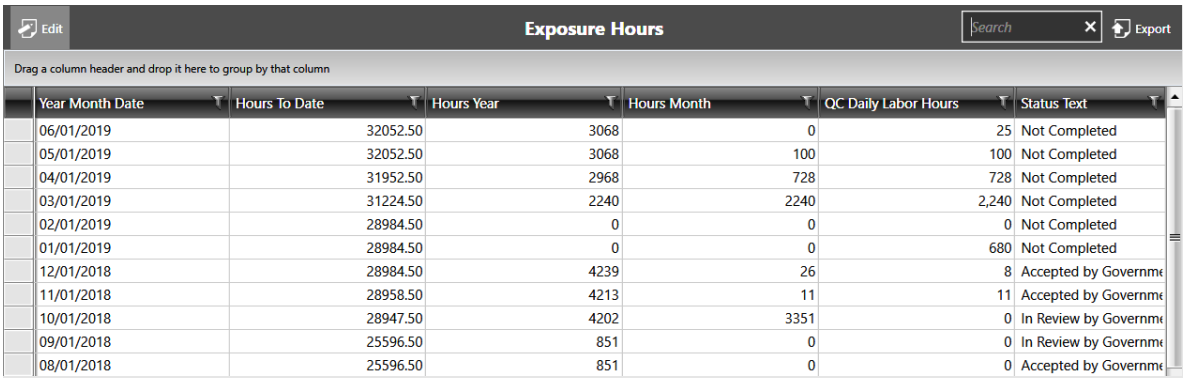
If the contract has been set up for dredging in the ***Contract Setup*** module, the ***Dredging Equipment*** module will be available for the Contractor to enter data. The Government can also add, edit, and delete the different types of dredging equipment using the respective buttons found at the top left of the equipment list.

Do not enter attendant plants into this module. Attendant plant information is entered on the Daily Dredging Reports. See the CM Manual for more information on this module.

7.11 Exposure Hours



Exposure Hours are the number of paid duty hours of all prime and subcontractor employees while at the worksite. Unpaid hours count as exposure when employees are quartered on-site.

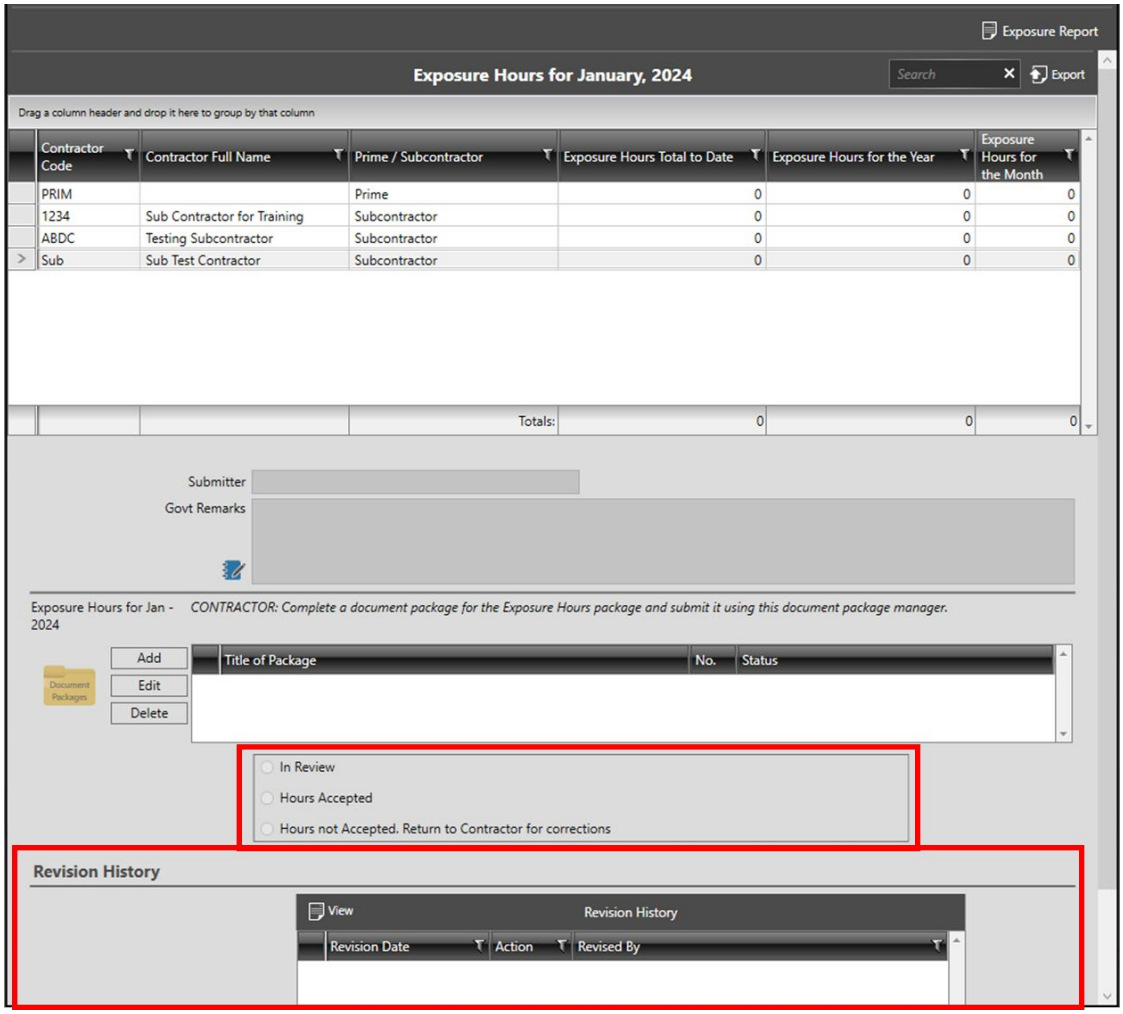


Contractors are required to submit a monthly report of the exposure hours starting from Notice to Proceed (NTP) until the actual completion date. This requirement should be included in the Contractor's contract safety specification. The months the Exposure Hours will be displayed start on the month of the NTP milestone actual date and will end the month of the Physical Completion milestone actual date.

RMS will create a line for each month on the first day of the subsequent month. It is the Contractor's responsibility to make sure the hours are correctly entered into the report prior to submitting to the Government.

Note: Contractors will not be able to enter or complete a month's report until the first day of the following month.

It is the responsibility of the Government to review and accept (or return) the exposure hours submitted by the Contractor:



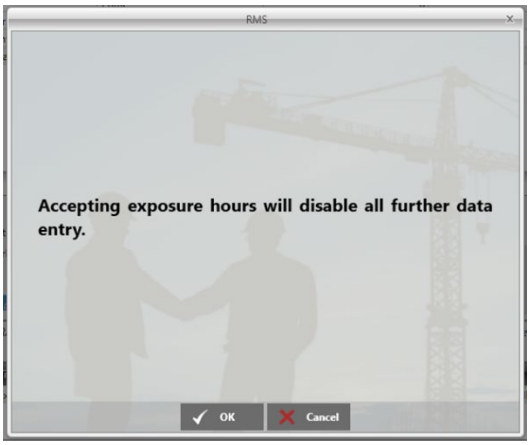
Note: Revision history can be found at the bottom of the screen in the *Revision History* table. This will capture actions taken on the Exposure Hours in CM and GM (Submit, Return, Accept). Select a revision entry and click the *View* button or double click a revision entry to open a read-only view of the Exposure Hours before the listed action was taken.

Note: Contractors will often ask why hours do not copy over, and the most common reason is because not all of the daily reports were completed for the month. If all the daily reports for that month have been complete, then the *Copy* button on the Contractor's side can be clicked to automatically fill in all the hours entered on those daily reports.

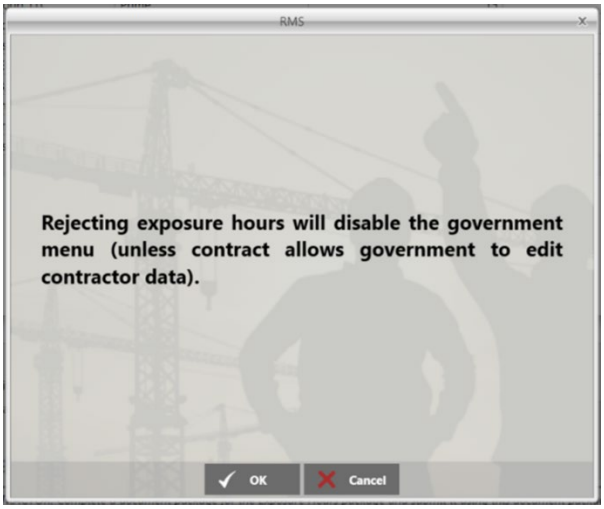
In Review is a temporary assignment that happens when the hours are submitted.

Hours Accepted will accept the Exposure Hours submitted by the Contractor and accept any associated Document Packages, as well. This will update the Exposure Hours submission to "Accepted by Government" in the Exposure Hours selection view and set all documents as ready to send to PCF.

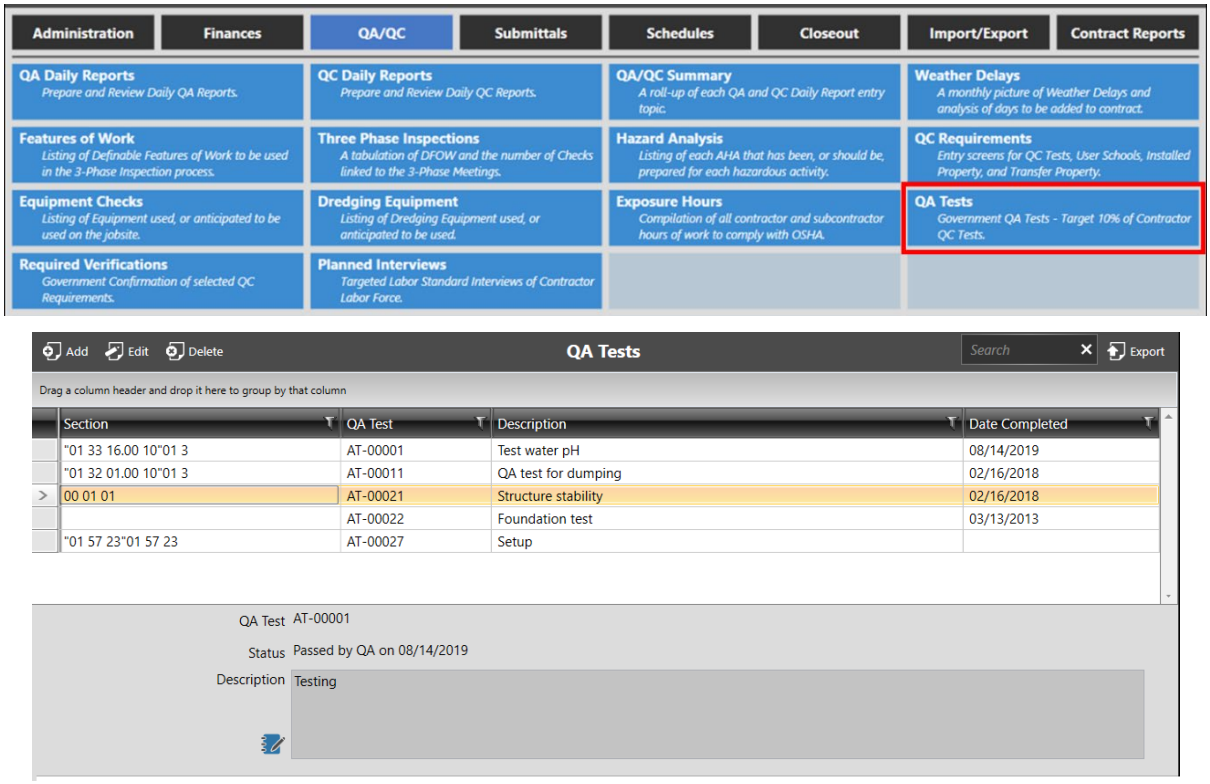
CAUTION: **This action cannot be undone, and all further data entry will be disabled upon acceptance as indicated in the prompt provided (see below). Make sure that review has been completed and the hours submitted are acceptable before selecting the *Hours Accepted* radio button.**



Alternatively, hours can be returned for corrections by selecting *Hours not Accepted. Return to Contractor for corrections*. This action will also return the associated Document Package(s) back to the Contractor. The warning below will be displayed.

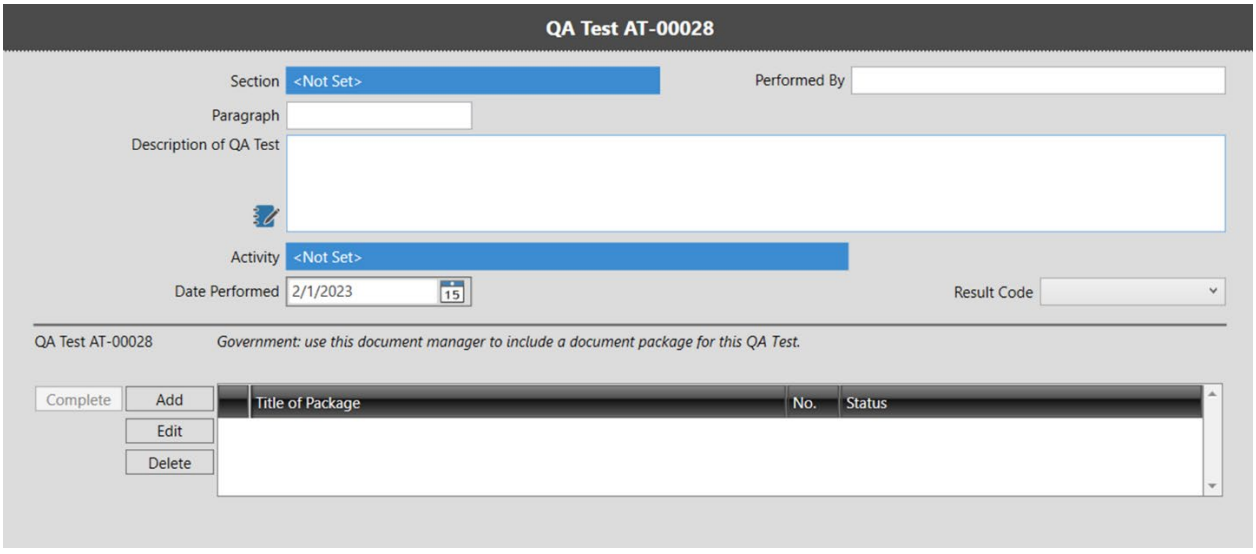


7.12 QA Tests



Enter the tests to be performed by, or on behalf of, the Government into the QA Tests option in the Government QA Planning section. This information can be obtained from either the contract specifications and/or the submittal register but must be coordinated with Contractor QC Plan for precise type and quantity of tests. The QA Test window is very similar to the QC Test window, except for the Addition of the QA Verification Required check box definitive in the QC Test window.

The screen below will be presented when clicking the *Add* button to enter a QA Test or when editing a QA Test using the *Edit* button. RMS will automatically assign the next sequential number for the test, preceded by the prefix AT.



The *Section* and *Paragraph* fields should be completed from the Contract Specifications. A specification section can be entered from the ***Specification Sections*** module within the ***Administration*** tab for the contract.

The name of the individual who performed the test can be entered in the *Performed By* field.

The *Description* field is used to provide a narrative of the test, including the type of test and any special requirements or potential observations.

An activity can also be assigned from the Pay Activities area (***Finances | Pay Activities***) in the *Activity* field.

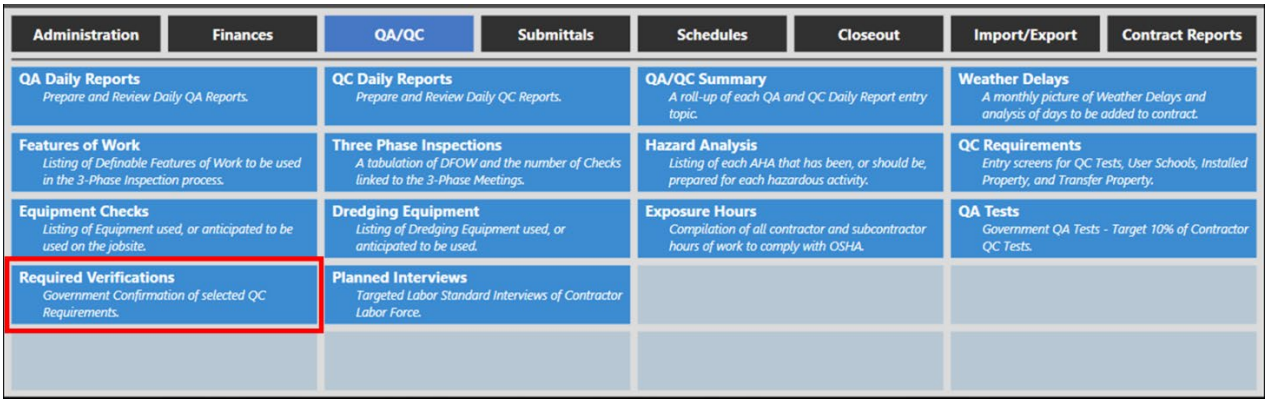
Enter a *Date Performed* for the test, and if needed, a Document Package can be added to include any supporting attachments.

Click the *Back* button to navigate back to the QA Tests screen.

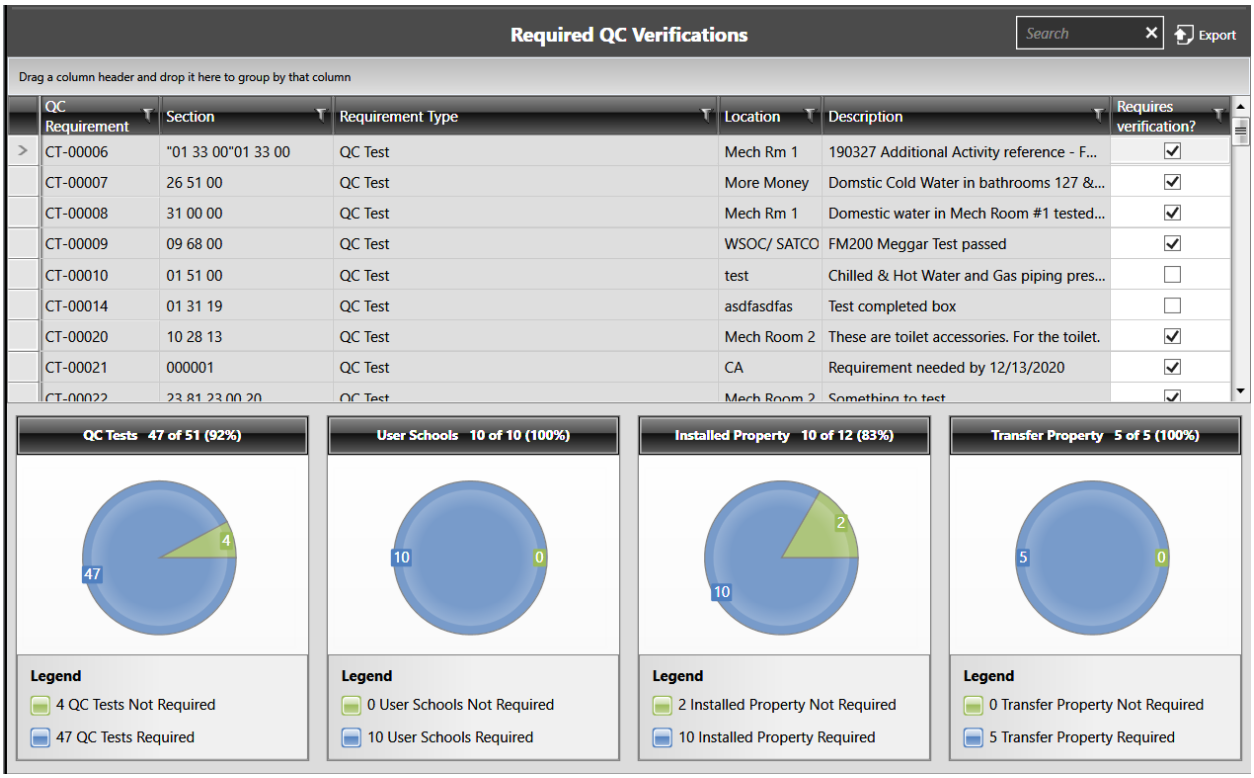
To delete a QA Test, select the test, click the *Delete* button, and confirm deletion.

7.13 Required Verifications

RMS titles this group of actions or contract requirements as QC Requirements. Many of these actions are critical enough to be specifically verified by the Government.



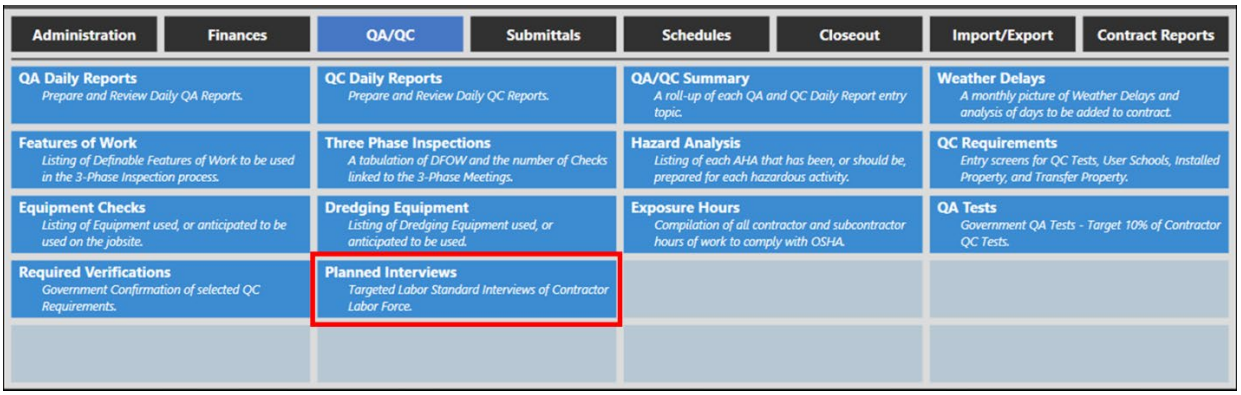
It would not be reasonable that the Government QA Staff be required to verify 100% of these actions, therefore only a representative number should be selected from each of the categories as requiring specific verification from the QA Staff. This selection should take place during the initial planning stages of the contract, after the requirements are identified and coordinated with the Contractor's CQC Plan.



This view is intended to provide a quick overview for the Manager to see at a glance the number of each item and the percentage of each item that will be verified.

The QC Requirements appear in the Contractor's QC Daily Report screens, until the requirements are updated and reported complete (with a passing grade if the requirement is a test). Just as with completed activities, once a QC Requirement is reported complete, it appears in the Government QA Report area to be verified if required. If the action taken by the Contractor complies with the requirement, the item is officially complete. If the requirement is reissued, it appears again in the Contractor's list and the cycle repeats itself.

7.14 Planned Interviews



Labor Standard Interviews, using DD Form 1567, are held with labor-type workers by Government Representatives as a spot-check to verify that the Contractors are in compliance with the labor standard provisions of the contract.

Contractor Code	Prime/Subcontractor	Display Name X	Trade	Number of Labor Interviews Planned
02te	Subcontractor	02te		0
100	Subcontractor	100	Carpet	0
ELET	Subcontractor	1st Electric, Inc.		5
Test	Subcontractor	2 test		0
TTT	Subcontractor	4 Testing Sub Contract		0
453	Subcontractor	453		8
ABAT	Subcontractor	ABAT		51
ABSO	Subcontractor	Absolute Finishes		2

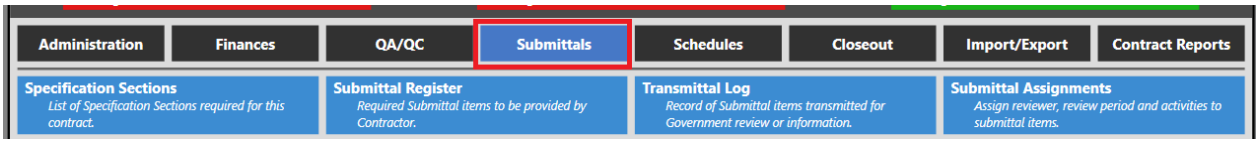
The interviews should include all trades, with emphasis being placed on the trades that have proven to be the most likely to avoid compliance (such as, landscapers and painters).

Use the menu option ***QA/QC | Planned Interviews*** to enter the Labor Interviews planned for the prime and each subcontractor.

Each subcontractor should have been entered into the system prior to completion of this screen.

Enter a target number of interviews for each of the Contractors by typing in the number to the right of each Contractor Name.

8.0 SUBMITTALS

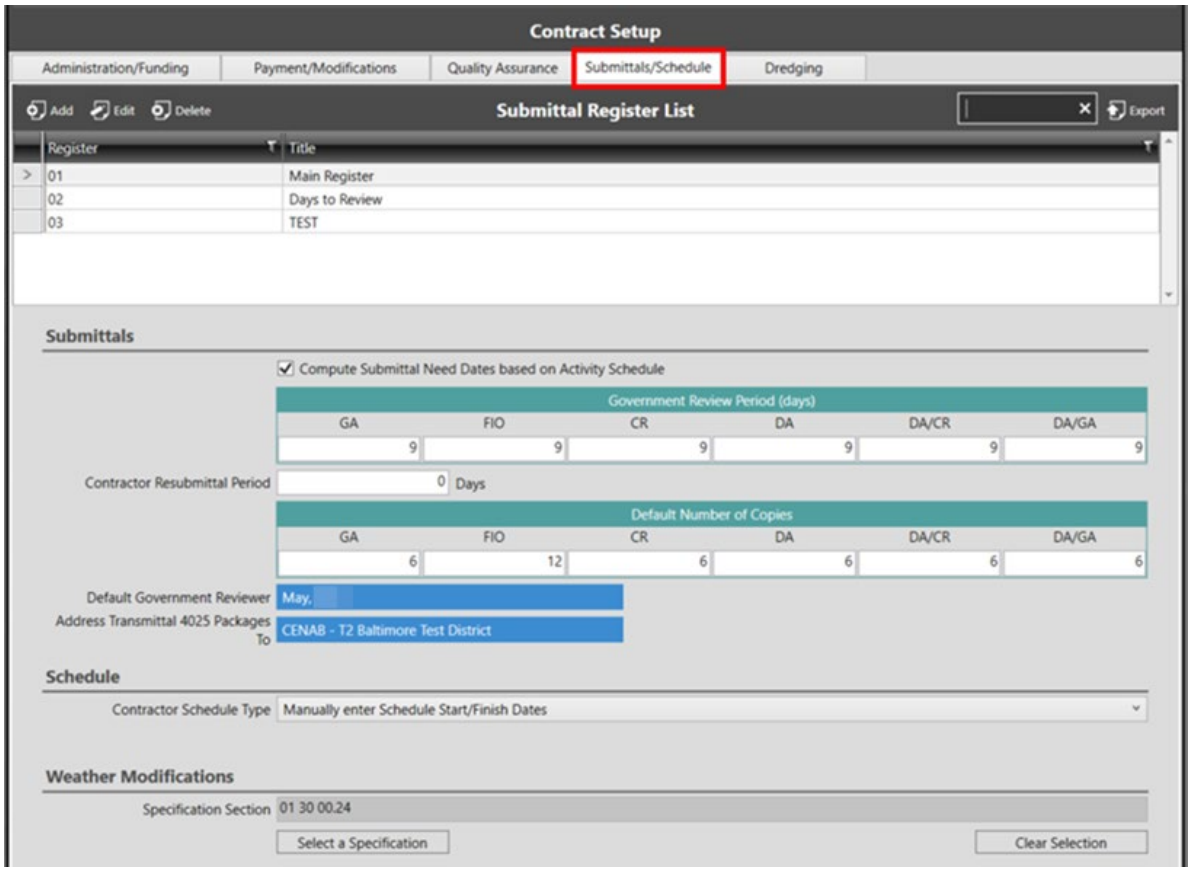


Submittals are required deliverables for the contract. Go to the ***Submittals*** tab to work on these items.

The SpecsIntact Specification Production System

The use of SpecsIntact (Specifications-Kept-Intact) in both Military and Civil contracts is mandatory, as established within Engineering Regulation ER 1110-2-1201 and CEMP-EA (1110) Memorandum of 14 April 1997, for all FY00 and future projects. This policy has been incorporated into ER 1110-345-700, “Drawings, Design Analysis, and Specifications”.

To set this up, users will need to navigate to the ***Administration | Contract Setup*** module. See section 5.7 for ***Contract Setup*** in Volume 1 of this manual. RMS can have as many different Submittal Registers, as needed.



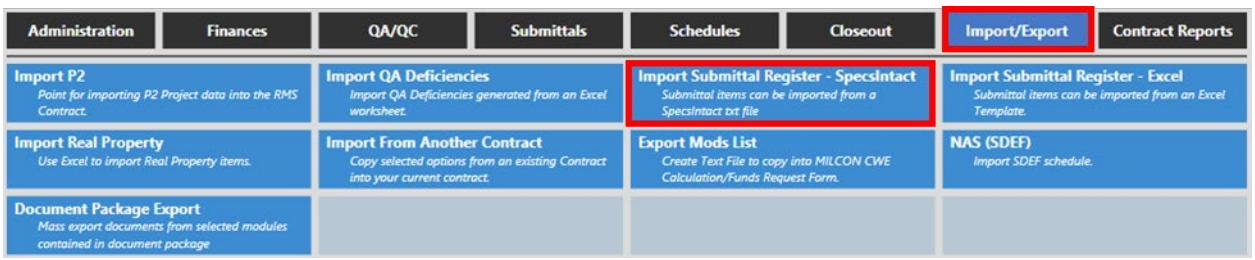
Prior to creating new submittal register items, the default review periods, number of copies and default reviewer must be entered. These defaults are stamped on any new items added from that point forward.

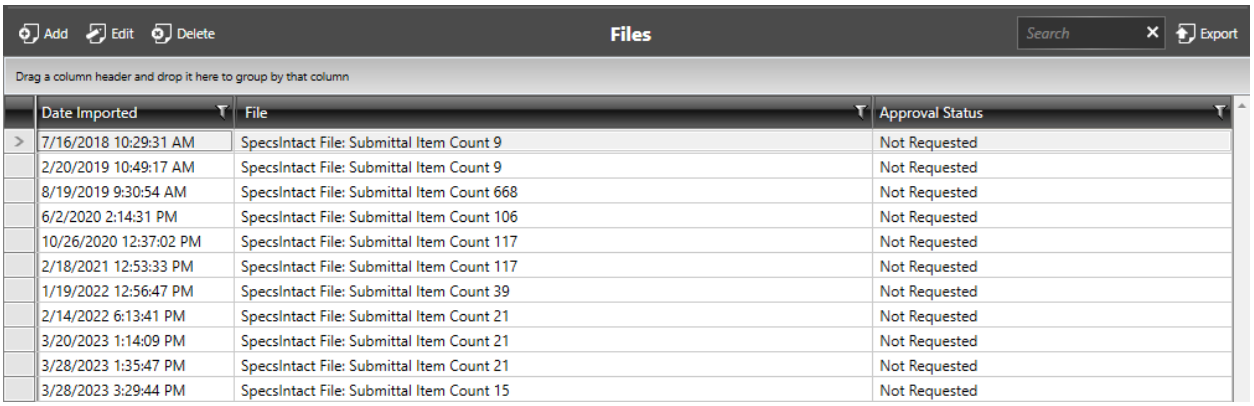
Note: Changes here will NOT affect any submittals already started or completed.

SUBMITTAL REQUIREMENTS

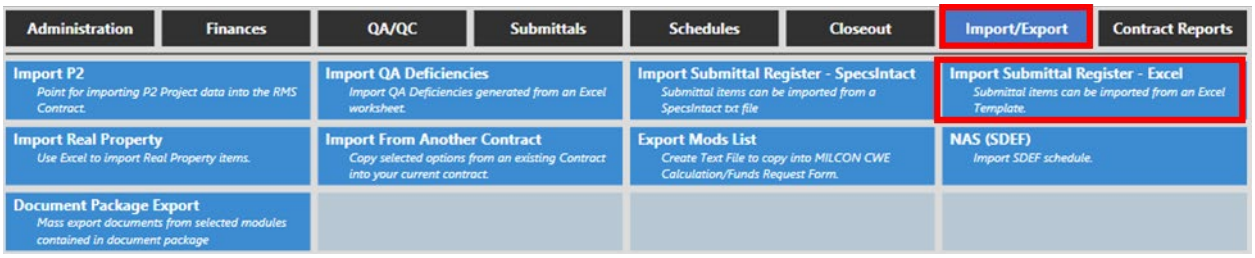
Submittal requirements can, and should be, imported from the **SpecsIntact** system. The *Import/Export* feature is shown from the main **Contract Menu | Import/Export** by highlighting Import SpecsIntact.

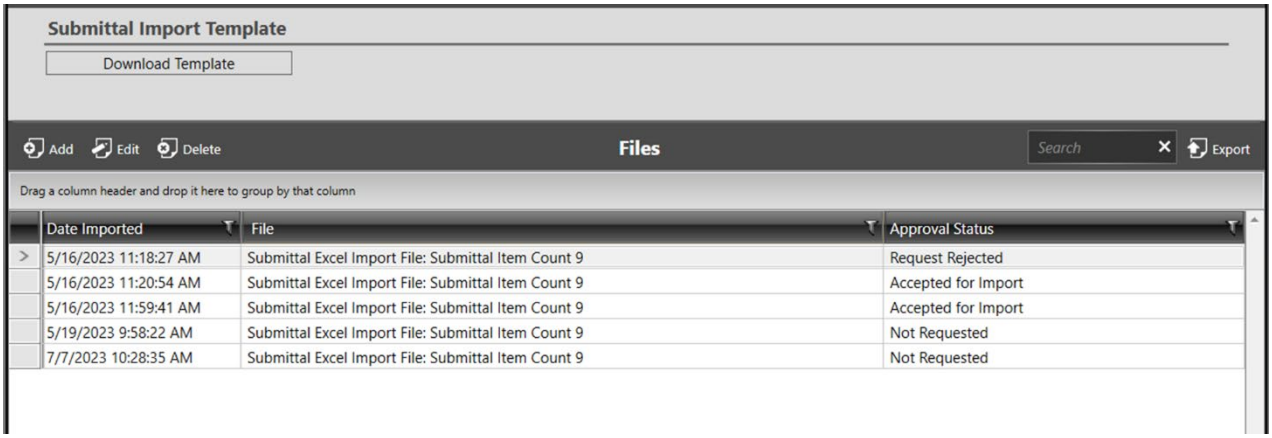
For Design Bid Build contracts USACE typically requires designers to use SPECSINTACT. Please Email the designer requesting the submittal register in Comma Delimited (TXT) file format. For Design Build contracts the Contractor can use SPECSINTACT or bulk upload the register via the RMS Excel template.





In addition to SpecsIntact, RMS has the capability to import an Excel spreadsheet for the Submittal Registers which is an unofficial data format. If there are multiple Submittal Registers in the contract, be sure to select the correct one when importing to RMS.

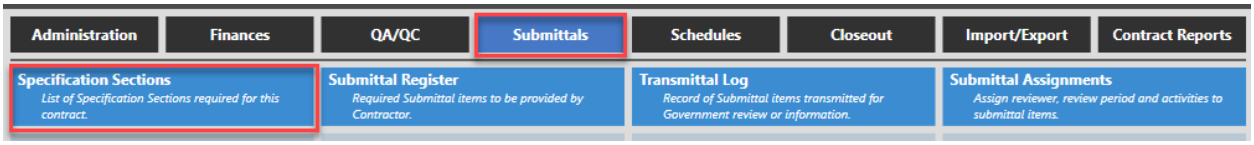




If the **SpecsIntact/Excel Template** import has been completed, the setup is also completed.

Manual entries can still be made, if required.

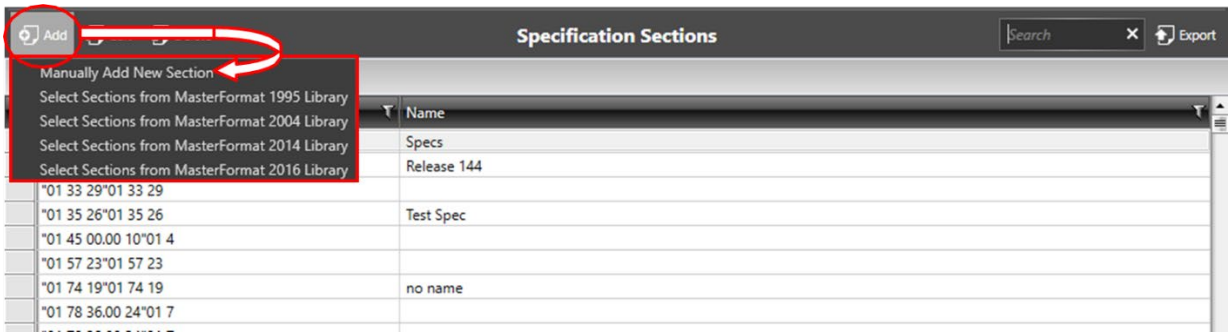
8.1 Specification Sections



Use this selection to manage the list of specification sections included in the contract. When using the Import feature from **SpecsIntact**, this selection can be used to verify all items listed have a title (name) after the submittal registry has been imported. The ***Specification Sections*** module is also used if changes, modifications, or manual entry is required.

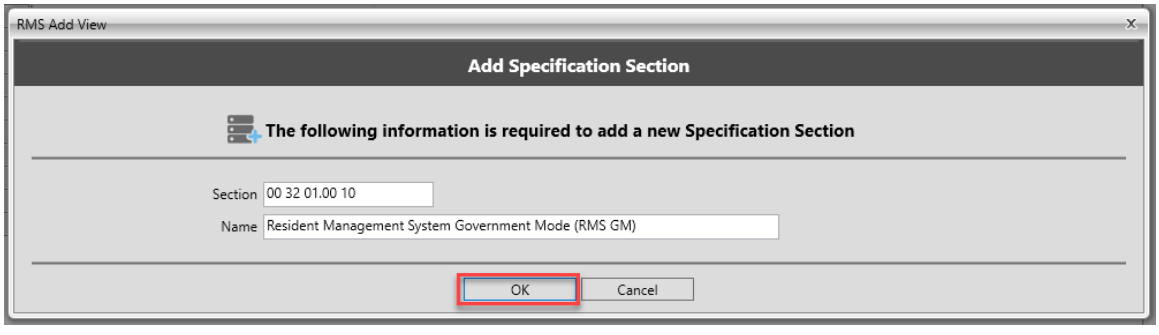
Revisions to this area will affect the current contract only and will not alter the specification sections listed in the ***System Library*** menu. The nice feature of this area of the program is that it allows submittal section numbers and titles that do not agree, and do not conflict with those in the library. That is, a section in the library could have the same number as a section in the contract, but a totally different title assigned to it.

RMS (***System Library***) includes the older format of **MasterFormat 1995** and the **MasterFormat 2004**, **MasterFormat 2014**, and **MasterFormat 2016**. The older version included 16 Specification Divisions and the new format includes 50+ Divisions. When downloaded from SpecsIntact, download all the fourteen characters available. With this format, it can be linked the submittal items to various other data, such as QC Test or QA Tests.



8.1.1 Manually Add New Section

Enter the Specification Section number and Name exactly as shown in the contract documents. Click *OK*, then the *Back* button. Continue doing this until all the specification sections are included in the table.

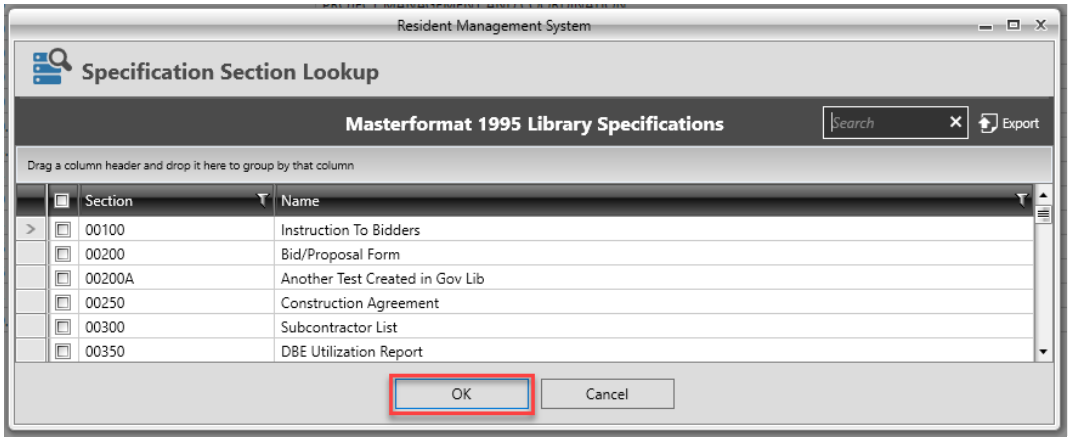


To edit a section that was added, select the line and click the *Edit* button.

To delete a section, select the line and click the *Delete* button.

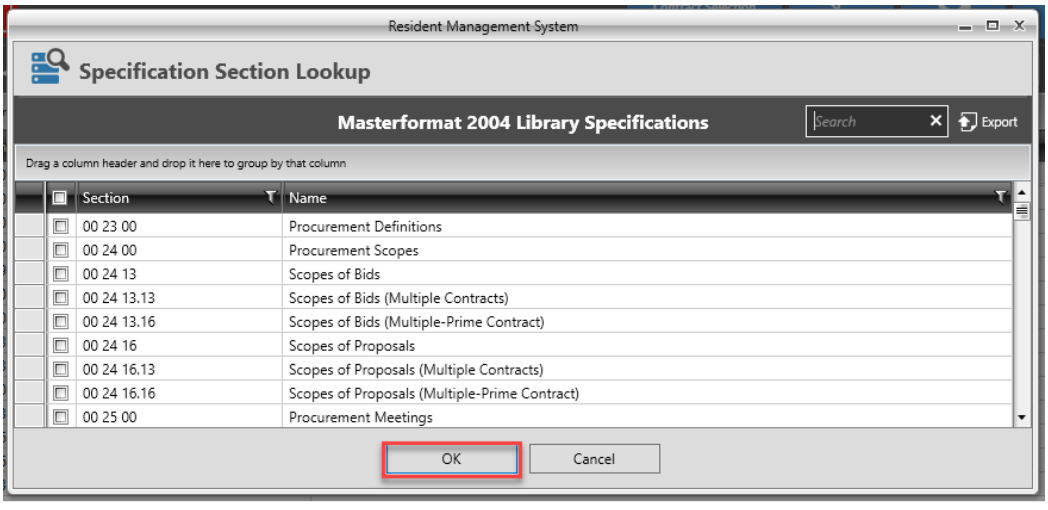
8.1.2 Select Sections from MasterFormat 1995 Library

Use this library when the specification section numbers follow the MasterFormat 1995 format. Place a checkmark on all sections that are in the contract, then click *OK*. If the contract includes additional sections that are not found in this library, those can manually be entered. See ***Manually Add New Section*** above. If titles from the library do not match exactly, select *Edit* to revise the *Name* in the table.



8.1.3 Select Sections from MasterFormat 2004 Library

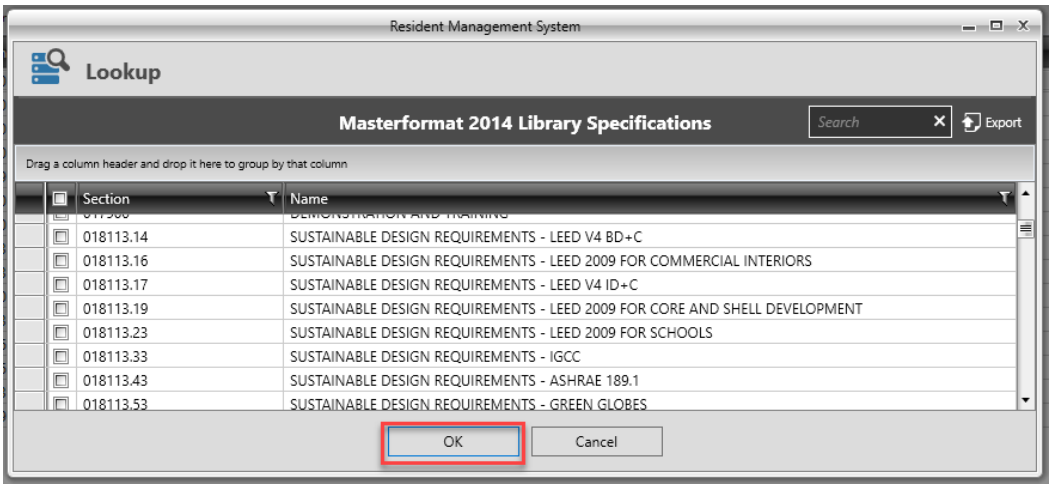
Use this library when the specification section numbers follow the MasterFormat 2004 format. Place a checkmark on all sections that are in the specified contract, then click *OK*. If the contract includes additional sections that are not found in this library, those can manually be entered. See section 8 in the Manually Add New Section. If titles from the library do not match exactly, select *Edit* to revise the *Name* in the table.



8.1.4 Select Sections from MasterFormat 2014 Library

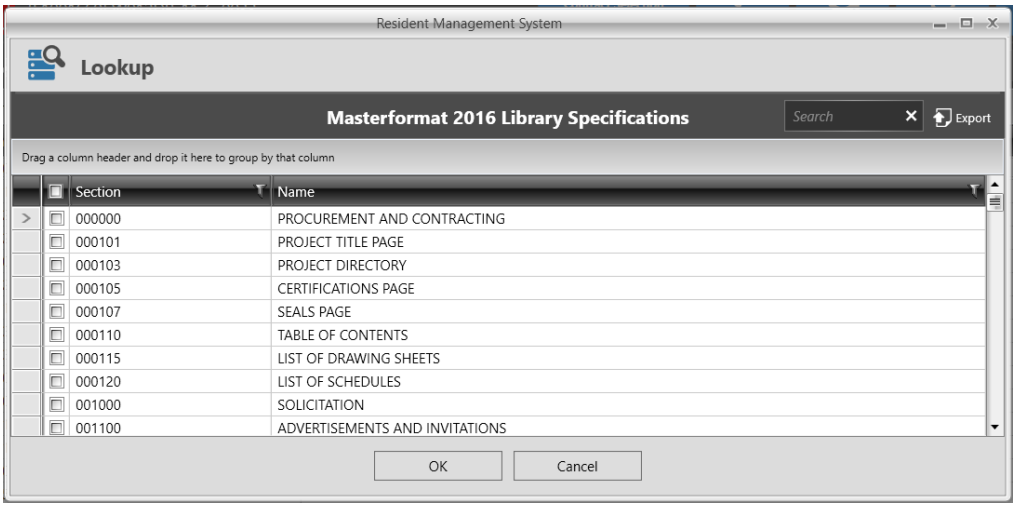
Use this library when the specification section numbers follow the MasterFormat 2014 format. Place a checkmark on all sections that are in the contract, then click *OK*. If the contract includes additional sections that are not found in this library, type those in manually to add. See section 8

on ***Manually Add New Section***. If titles from the library do not match exactly, select *Edit* to revise the *Name* in the table.

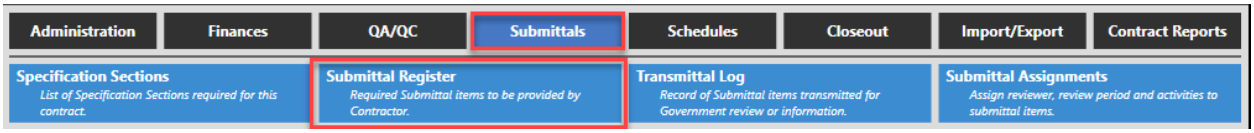


8.1.5 Select Sections from MasterFormat 2016 Library

Use this library when the specification section numbers follow the MasterFormat 2016 format. Place a checkmark on all sections that are required for the contract, then click *OK*. If the contract includes additional sections that are not found in this library, users can manually add those using the *Add* option. See the section on ***Manually Adding a New Section***. If titles from the library do not match exactly, select *Edit* to revise the *Name* in the table.



8.2 Submittal Register



The ***Submittal Register***, also referred to as ENG Form 4288, consists of items identified in the contract's specifications and drawings that the designer has determined are necessary to adequately describe the work. These items are primarily found in the Submittals paragraph in each specification section. However, the items listed there may not be all-inclusive. It is

recommended that the specifications be carefully read and drawings to identify all the submittal requirements are understood. Additional items that need to be submitted that were not on the original submittal register may be encountered. The submittal register is a living document. Do not hesitate to add to it as the contract progresses.

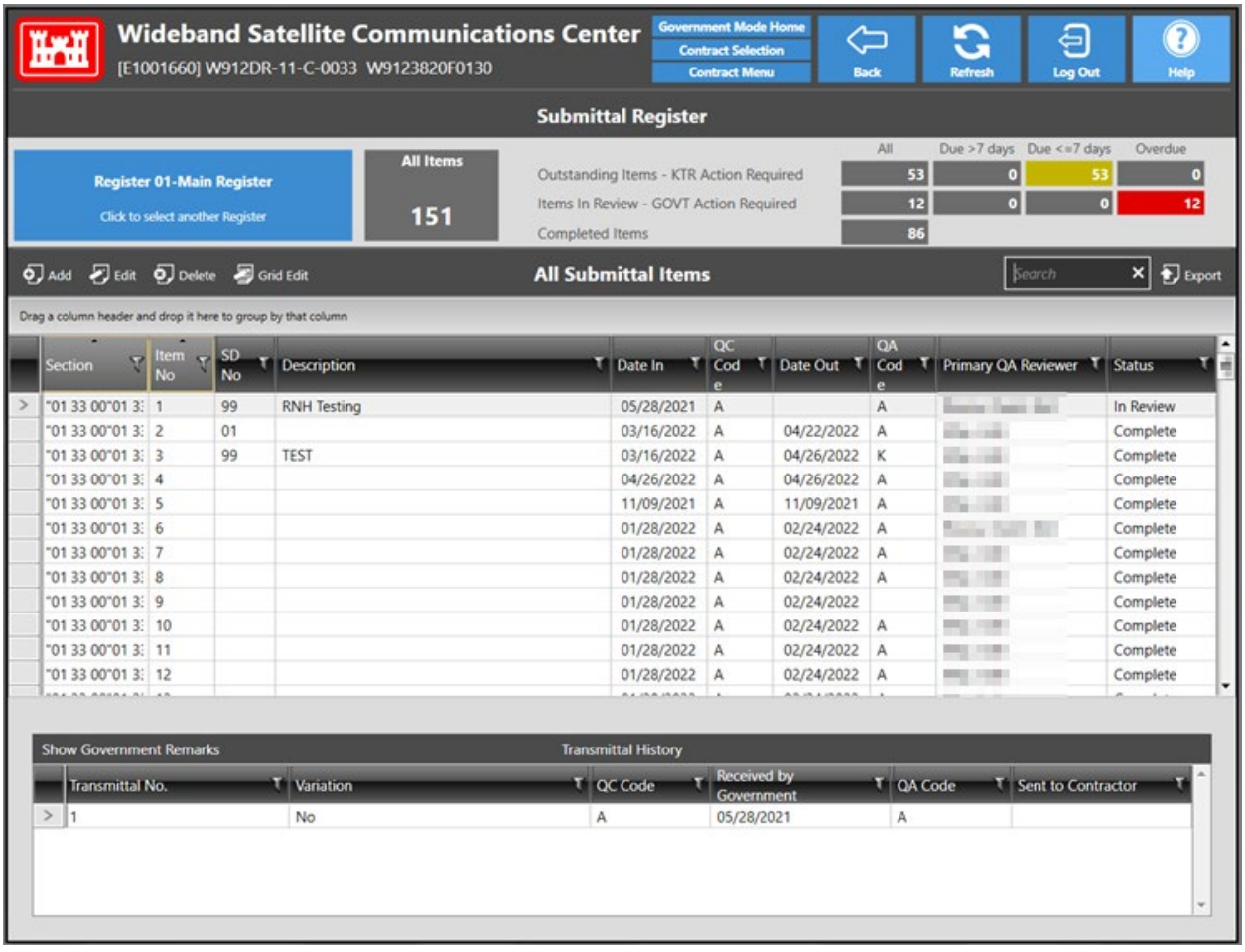
Contracts that include specification section 01 33 00 Submittal Procedures, or equivalent, must have the submittal registered properly maintained and updated throughout the duration of the contract.

In most cases on Design-Bid-Build type contracts, the USACE Representative will provide an electronic copy of the submittal register provided at the end of section 01 33 00. Contact the USACE Representative to either obtain the file which can then be imported or request that the USACE Representative import the file into RMS. Every office may have its own procedure, follow the directions of the USACE Representative.

When a SpecsIntact file is not available, such as in Design-Build contracts in which the Contractor is responsible for the design and thus the submittal register, or in simplified designs when the specifications are contained on the drawings, the submittal register can be created manually, item by item (see below), or by importing a specially-formatted spreadsheet (see ***Section11.3. Import/Export | Import Submittals.***)

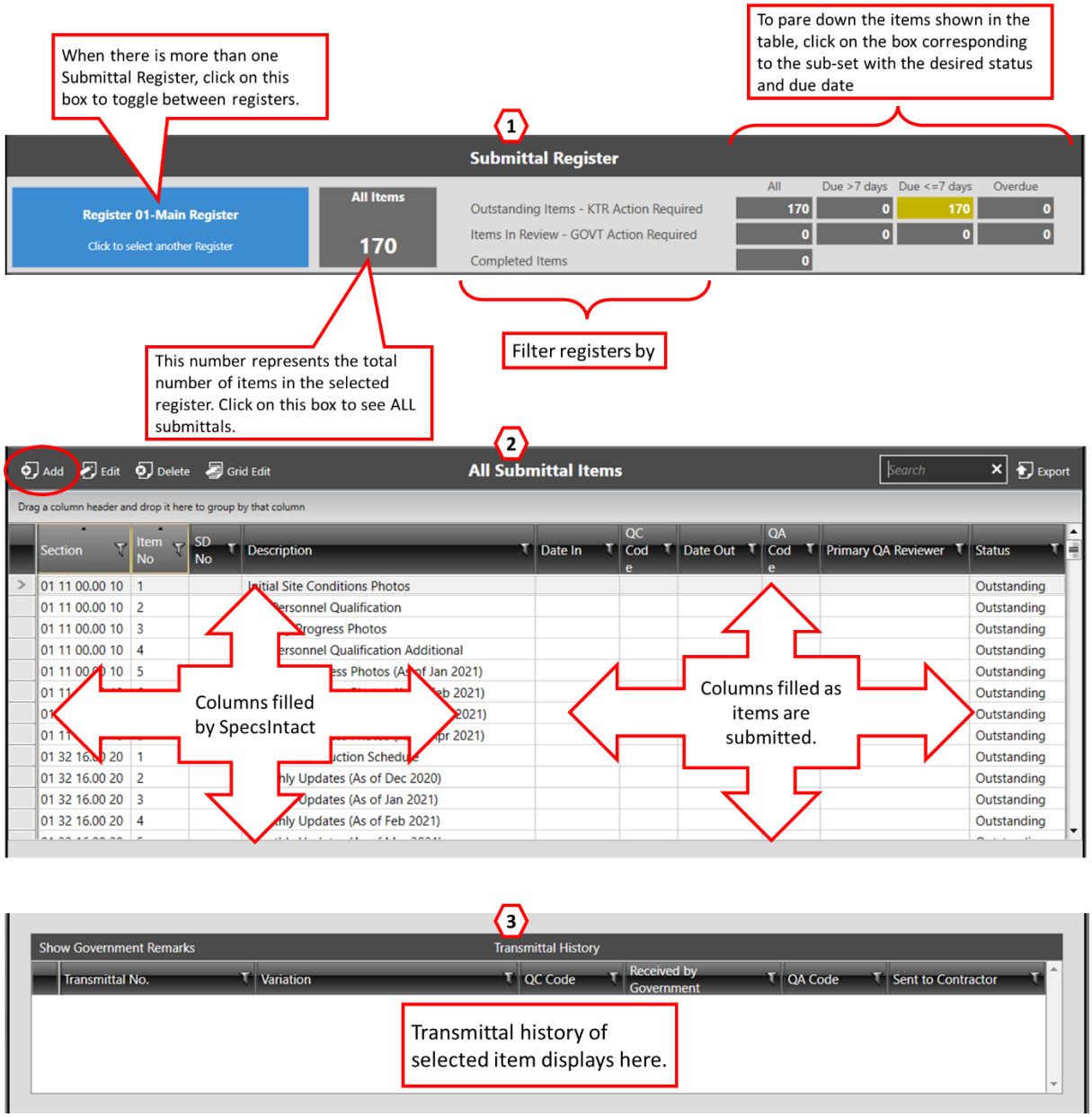
Go to ***Contract Reports |Submit |Submittal Register ENG 4288*** to obtain a hard copy print out.

Below is the is a view of the submittal register.



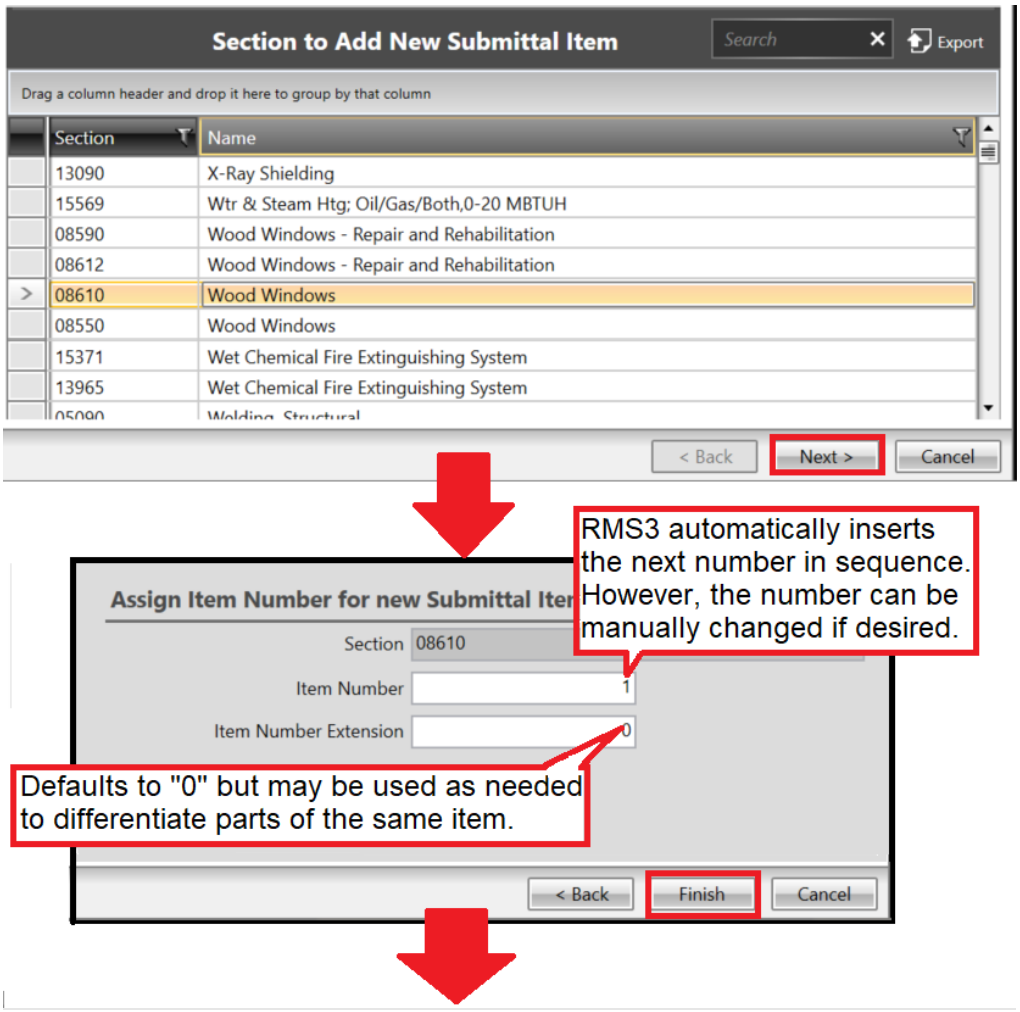
8.2.1 Building the Submittal Register

The screen consists of 3 main parts: 1) Colored blocks for filtering the Submittal Register, 2) the list of Submittal Register items, and 3) the transmittal history of a submittal item.



If more than one Submittal Register is needed within the contract, inform the USACE Representative. The setting for this feature is controlled in RMS/GM in ***Administration | Contract Setup | Submittals/Schedule***, see the section 5.7 on Contract Setup in volume 1 of this manual for instructions.

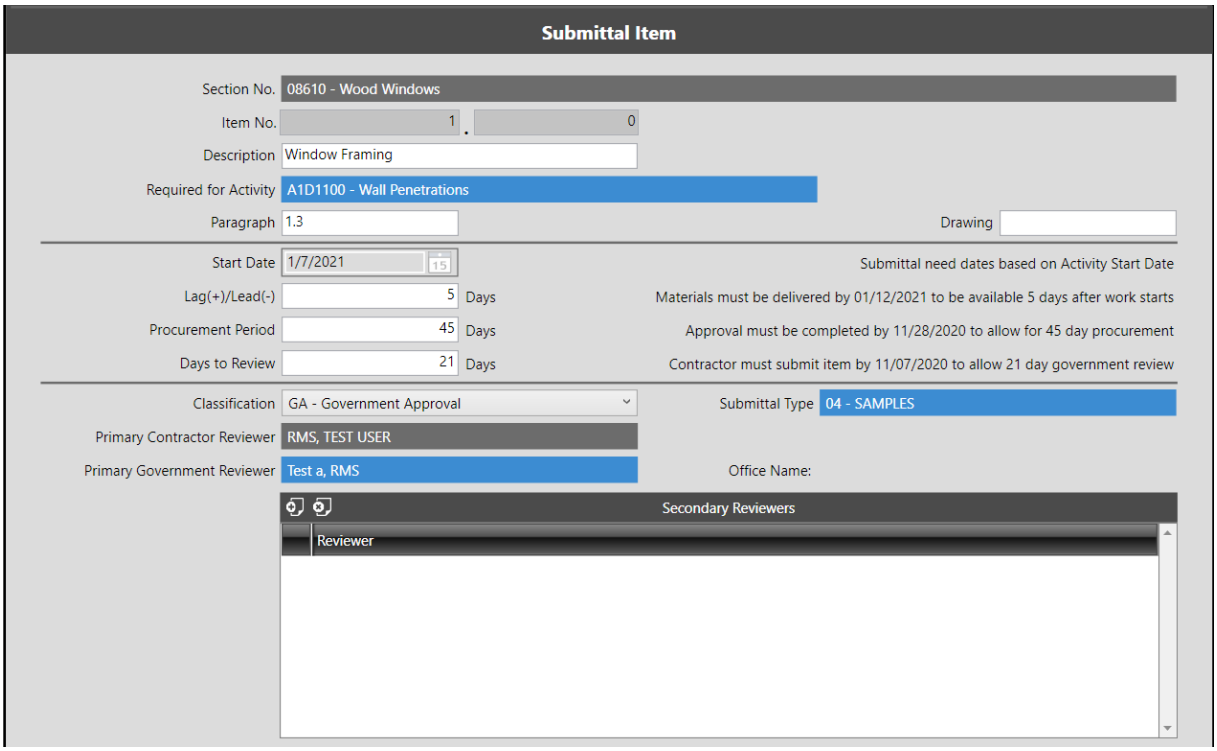
Click on *Add* to manually add submittal items that were not in the SpecsIntact file. This will open a lookup table that includes all the specification sections entered in the ***Submittals | Specification Sections*** module. Select the section of the submittal item to add, then click on *Next*. Enter the desired numbers in the subsequent data box, then click on *Finish*.



Item Number: When there is more than one item for the same section number, RMS will automatically increment this field.

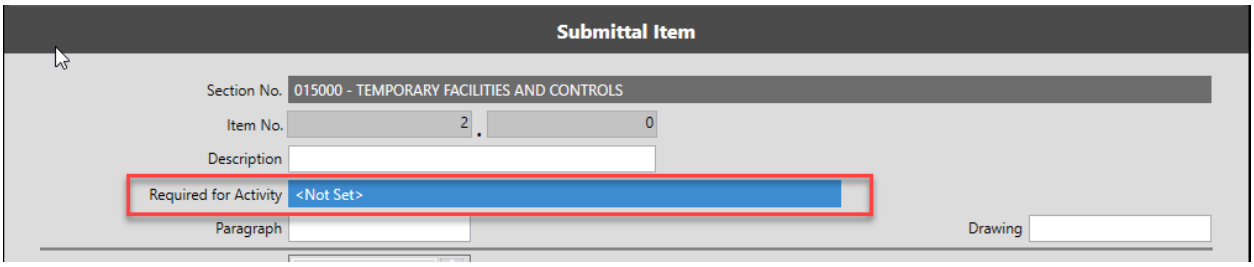
Item Number Extension: Extension will not tie items together and does not work as a resubmittal.

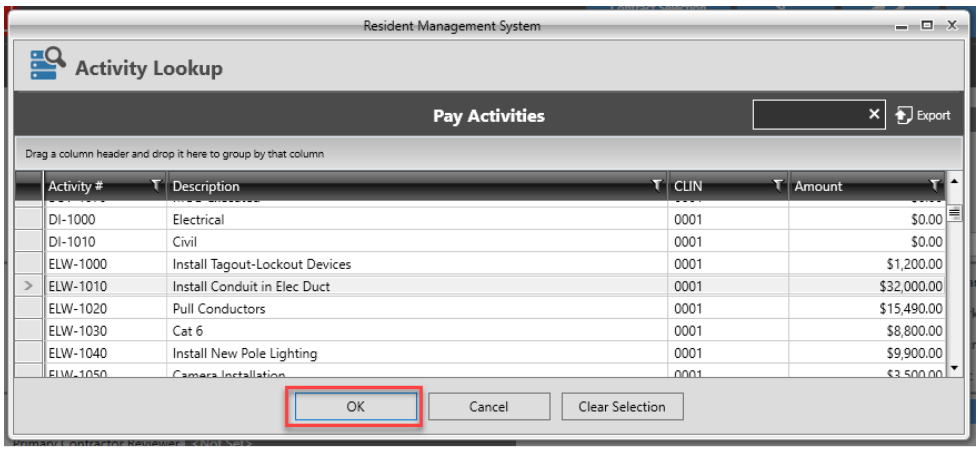
After clicking the *Finish* button, the ***Submittal Item Edit*** view will be presented as shown below.



Description: Enter a brief description of the item (40-character limit.)

Required for Activity: This may be the most important piece of information attached to the item. The schedule dates associated with the activity are used to calculate the dates for the Submittal Register. Click on the blue box to open the Activity lookup. All Pay Activities will be displayed. Select the activity to which this item is most closely related to or affected by, then click on *OK*.





Paragraph: Enter the specification paragraph number which describes the requirement for this item.

Drawing: Enter the drawing sheet number which describes the requirement for this item.

Start Date: There are two ways this date can be entered, manually or automatically from the Activity Schedule. Manual entry will allow a date to be selected from the field when it is active. If the contract is set up to automatically populate from the Activity Schedule, RMS will populate this date with the activity start date of the activity selected in the *Required Activity* field. All the schedule dates associated with this submittal item will use this date to calculate the date columns in the submittal register. If the date columns in the Submittal Register are blank, return to the submittal item and identify the activity with which it is associated.

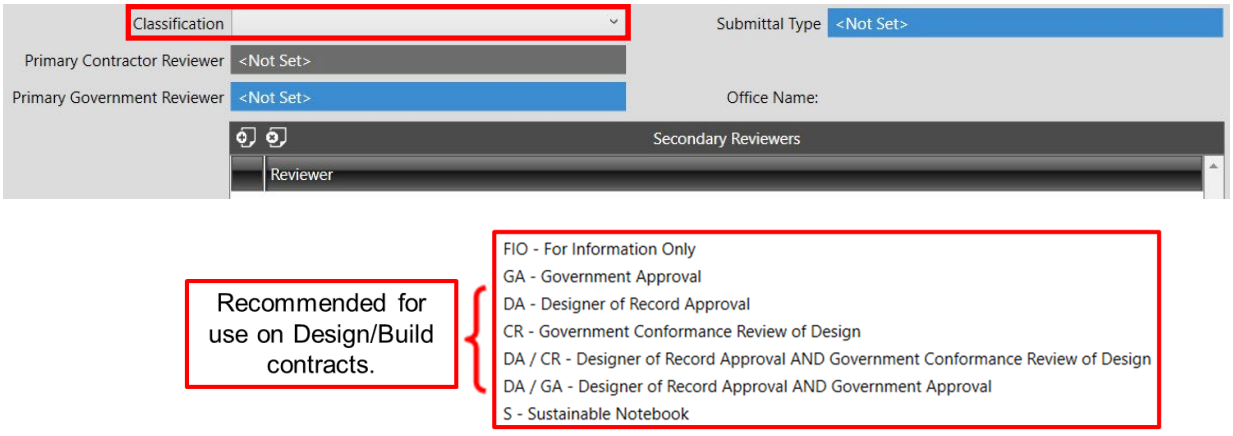
> *Note*: To set the submittal register start dates for manual entry or to pull the dates from the Activity Schedule, see instructions in the section on ***Contract Setup | Submittal/Schedules*** in volume 1 of this manual.

Lag(+)/Lead (-): Enter the number of days after (positive number) or before (negative number) the activity start date by which this item must be delivered.

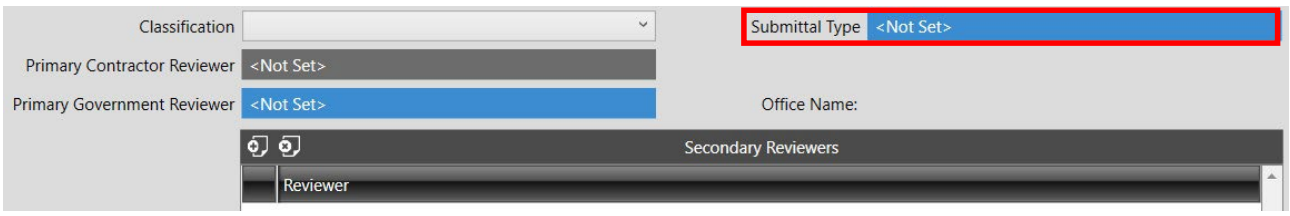
Procurement Period: Enter the number of days it will take to obtain the item once ordered/requested.

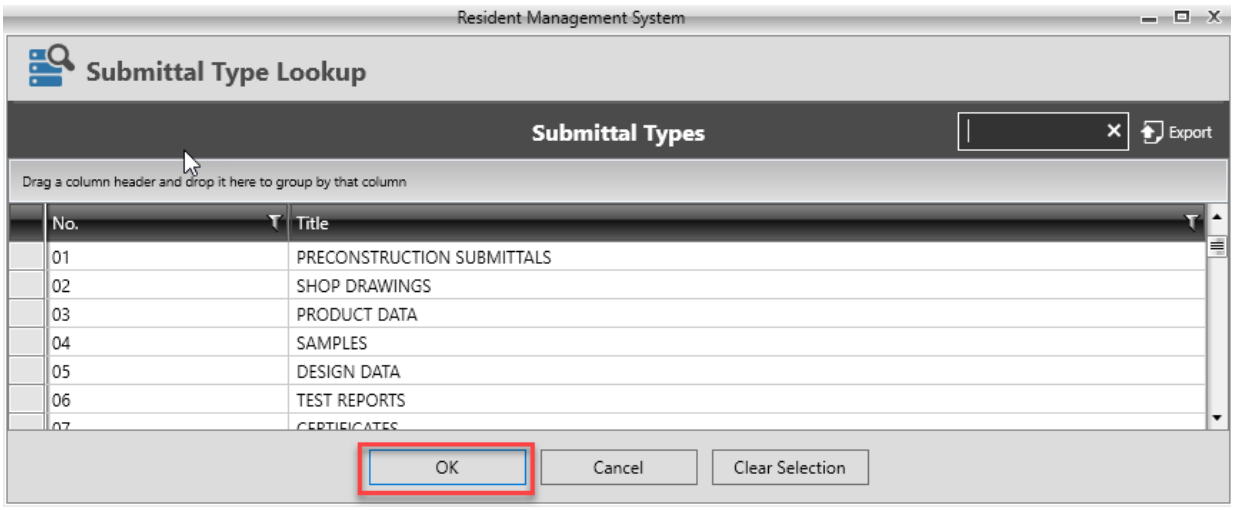
Days to Review: The Government typically requires a minimum of 30 days to review. This value should already have been input by the USACE Representative. The review period is entered in RMS/GM in ***Administration | Contract Setup | Submittals/Schedule*** tab.

Classification: Click on the box and select from the available options.



Submittal Type: Click on the blue box and select from the Submittal Type Lookup table.





Click on *OK* when entry has been completed.

Primary Contractor Reviewer: This information will be completed by the Contractor Representative.

Primary Government Reviewer: Click on the blue box to identify a reviewer to be responsible for ensuring the submittal is correct and complete. This selection is pulled from the Government Staff Member Lookup table, which includes all the staff members in the Government Staff table. Click on *OK* when done.

Office Name: The office to which the Primary Government Reviewer belongs will be displayed.

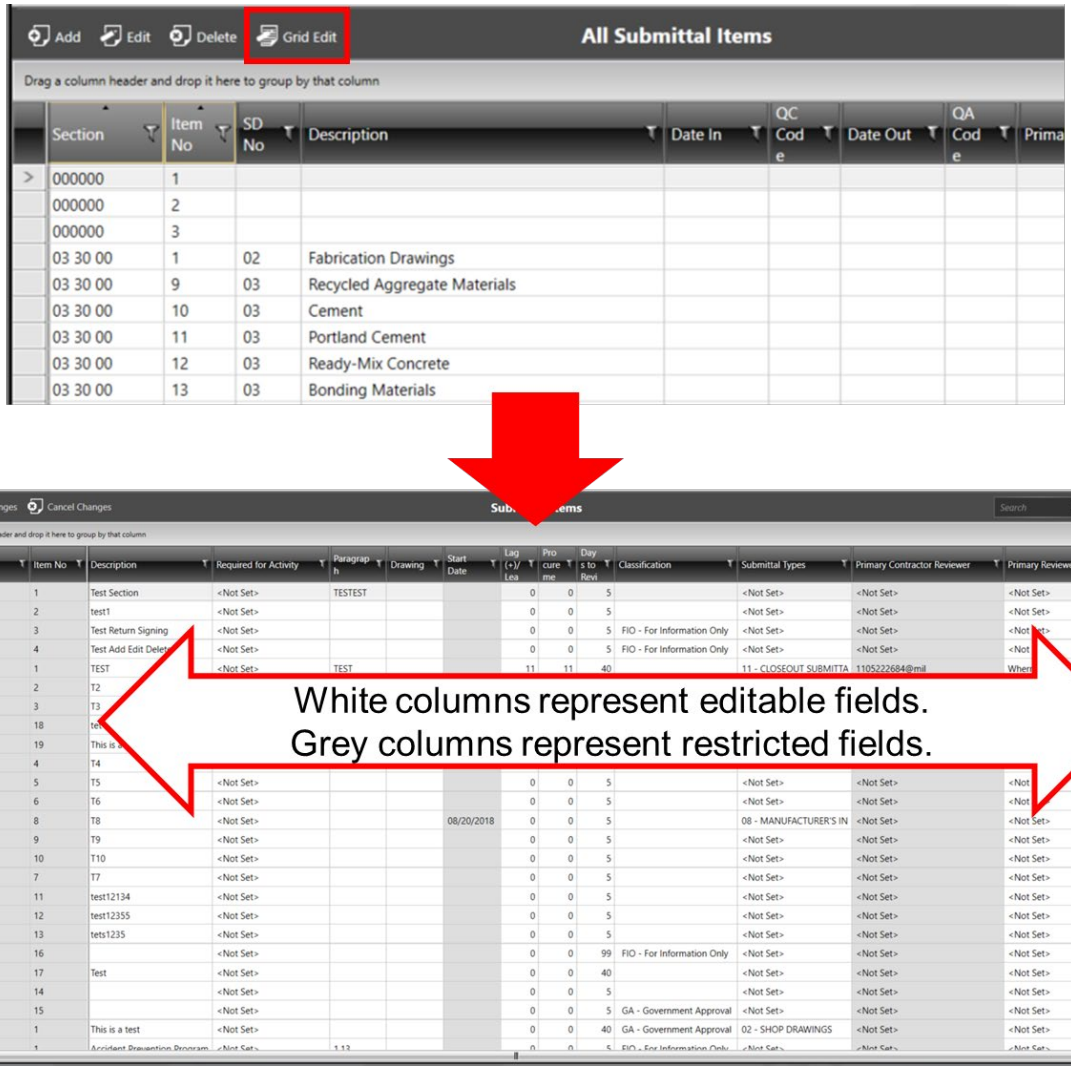
This information is pulled from the user's staff record. If it is incorrect, please contact a District Administrator to update this information.

Secondary Reviewers: The additional Government staff who will assist with the review of this submittal.

After entering all requested data, click on the *Back* button. Repeat this process for all other items that may be missing from the Submittal Register.

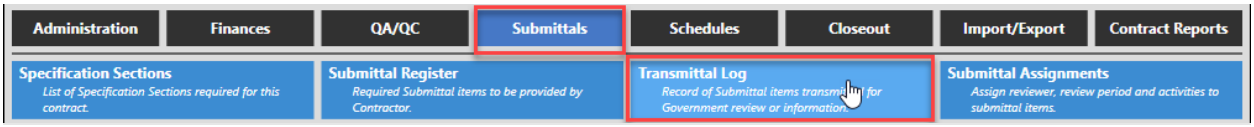
8.2.2 Using the Submittal Grid Edit view

Click on the *Grid Edit* button for a tabular view of items in the register. This is a more convenient method for entering selected information on items already in the register. This method cannot be used to add new items. Double click on any unshaded block to enter missing information or edit existing information. Click on *Save Changes* or the *Back* button when done.



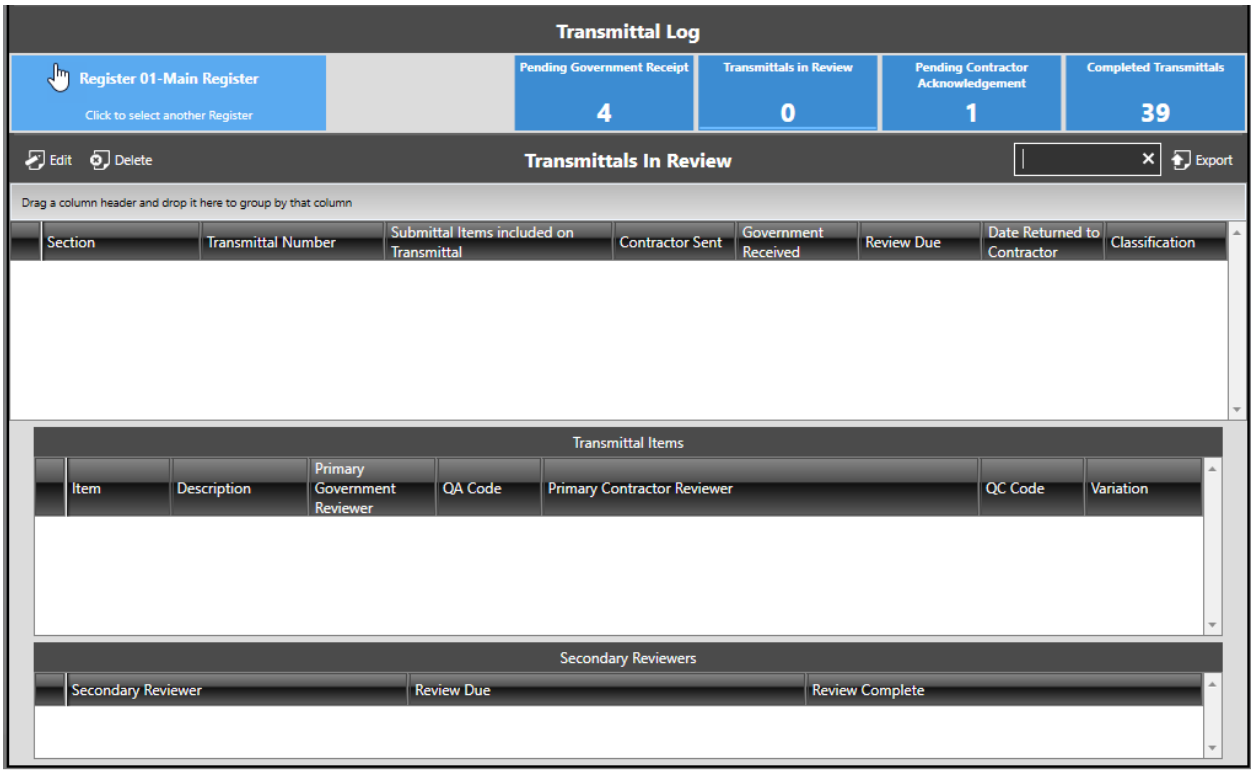
Note: Once Contractor and Government agree that the Submittal Register is complete, it is possible to lock the Submittal Register so that no changes can be made to those items already in the list. Locking the register will not prevent users from adding new items, it only prevents changes to the items that are already in the list. To lock the register, users can use the ***Contractor Mode Record Locks*** module. Please see the section on Contractor Mode Record Locks in *Government Manual Volume 1* for instructions on how to lock the register.

8.3 Transmittal Log



The ***Transmittal Log*** maintains the record of submittals made and the associated status. All submittals must be made using a Transmittal form or ENG Form 4025-R (4025), generated in RMS. See specification section 01 33 00 Submittal Procedures, or equivalent, for a detailed explanation of the submittal process and requirements. RMS provides the means to easily carry out the required actions.

Transmittal Log default view for Government users is the Transmittals in Review:

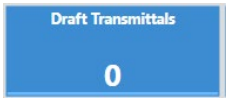


Transmittals are grouped into 4 subsets:

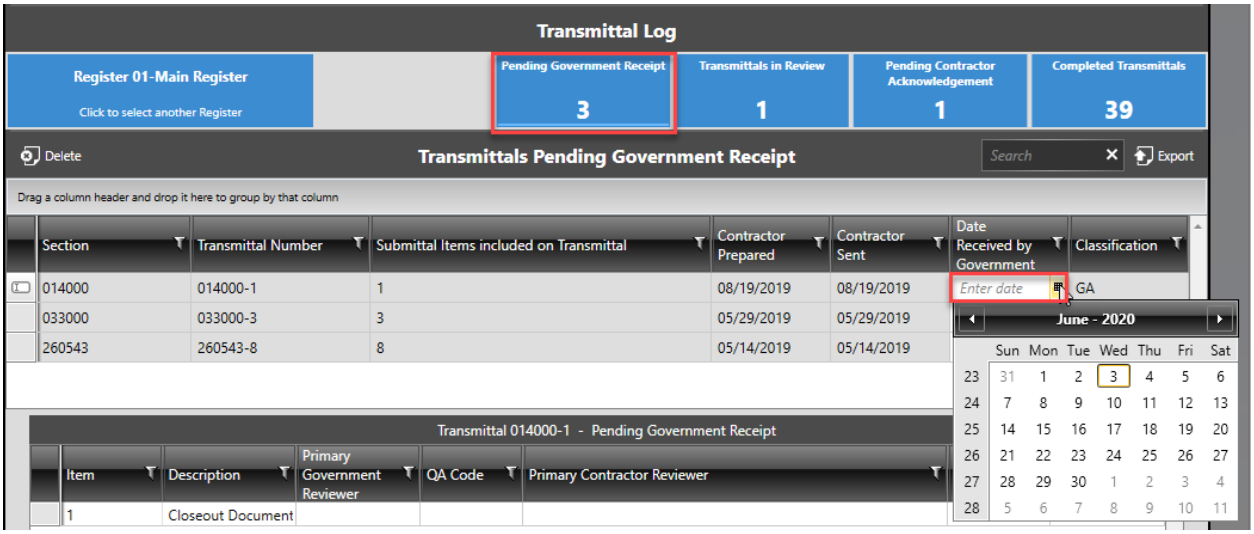
- *Pending Government Receipt* — Transmittals that have been completed by the Contractor and submitted to the Government, but the Government has not yet acknowledged receipt/date stamped in.
- *Transmittals in Review* — Transmittals received and acknowledged by the Government, but not yet acted on.
- *Pending Contractor Acknowledgement* — Transmittals on which the Government has completed its action and returned to Contractor, but Contractor has not yet acknowledged receipt. These transmittals may or may not require additional action by Contractor. These transmittals can be viewed by both the Contractor and the Government but cannot be edited.

- *Completed Transmittals* — Transmittals on which the Government has completed its action and returned to Contractor, and Contractor has acknowledged receipt.

Note: If setup for Government to enter Contractor data, then another subset labeled *Draft Transmittals* between the *Register* lookup tile and *Pending Government Receipt* sorting tile.

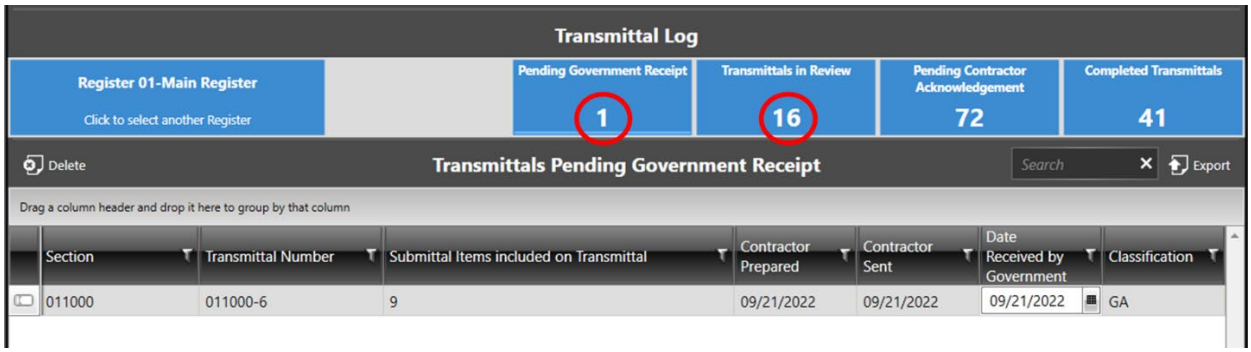


The list of transmittals corresponding to any of the categories can be seen by simply clicking anywhere in the corresponding blue tile. A filtered list of the category selected will be displayed as in the screen below.

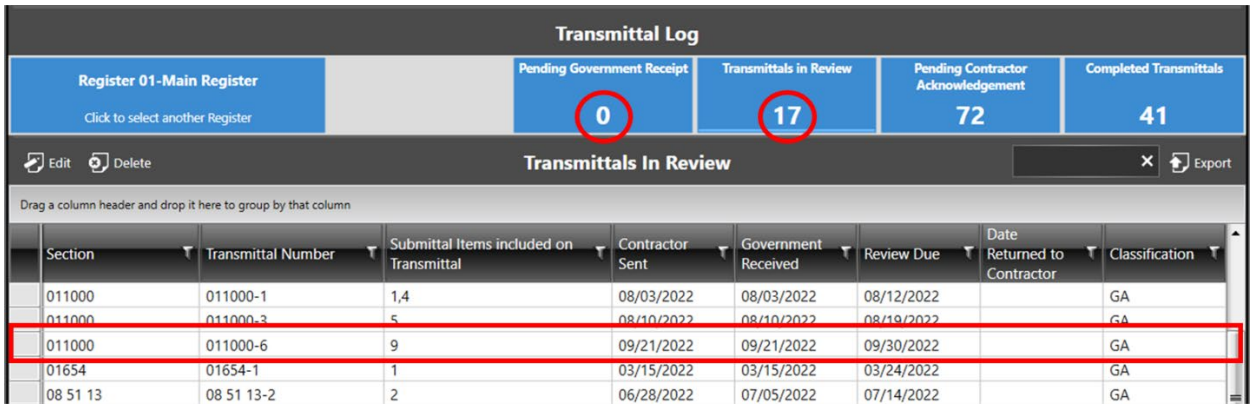


8.3.1 Government Review Process

Step 1: Proceed to ***Pending Government Receipt*** and date stamp a transmittal.

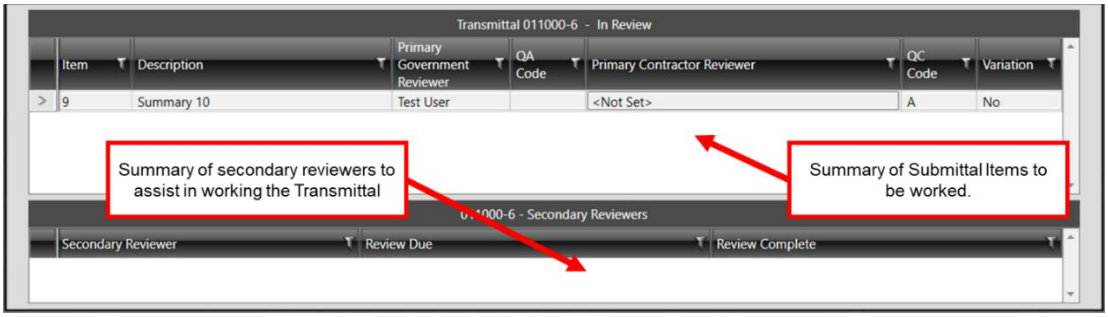


Step 2: Proceed to ***Transmittals in Review*** to act on the transmittal. Notice the *Pending Government Receipt* number has decreased, and the *Transmittals in Review* number has increased. The transmittal record has appeared in ***Transmittals in Review*** and is now available for editing.

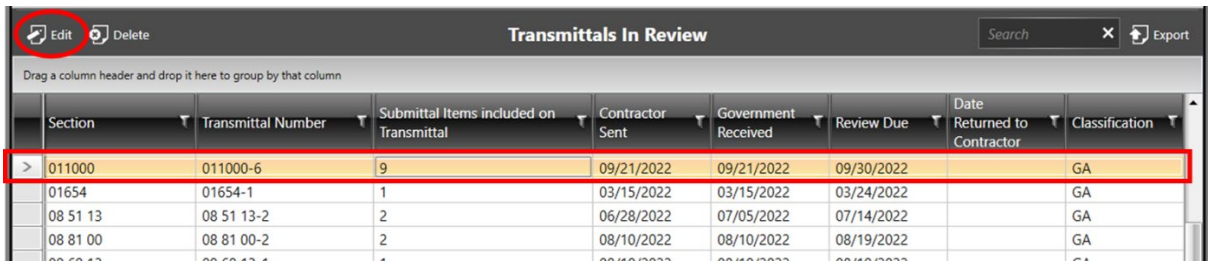


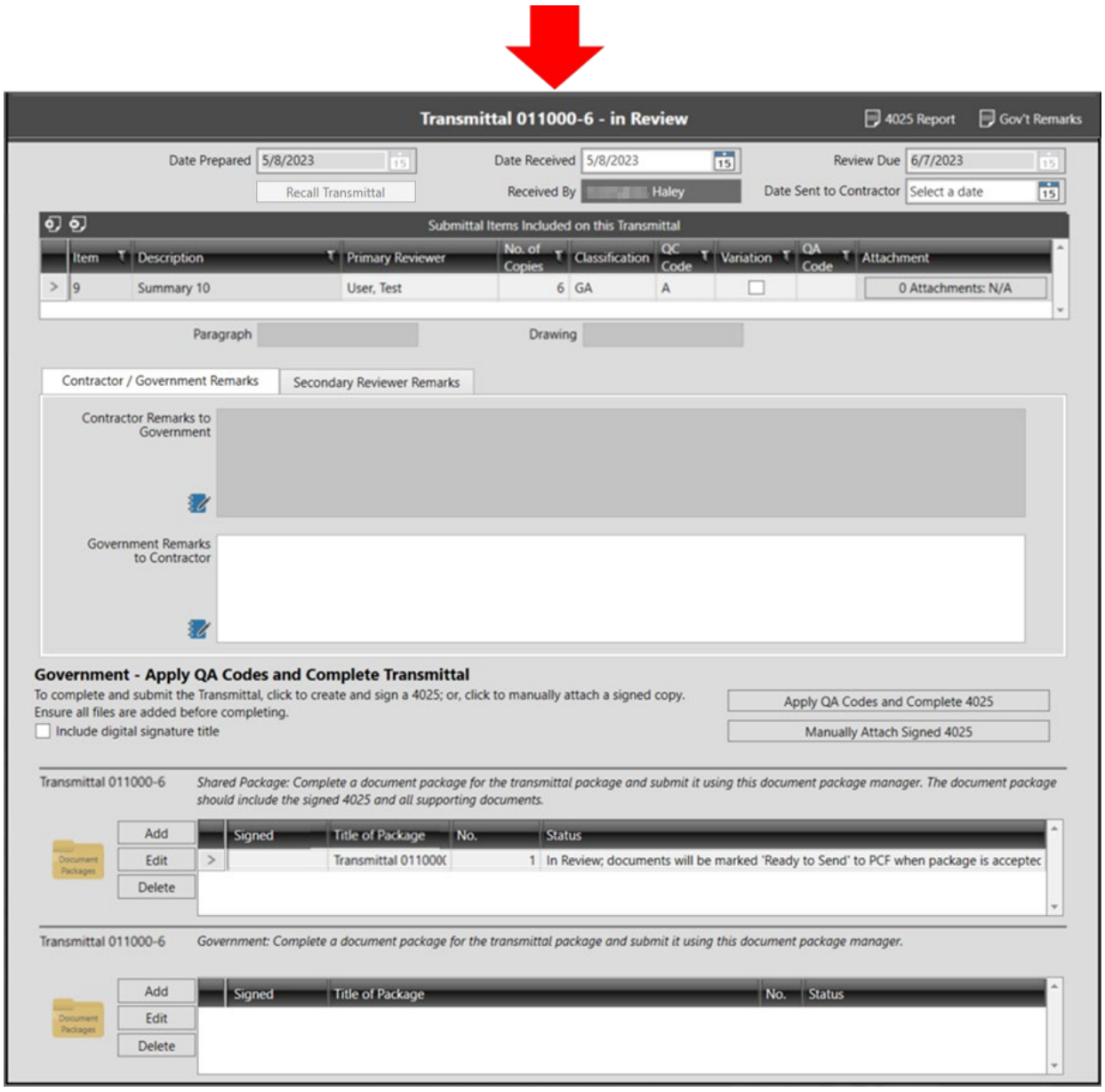
A submittal consists of the 4025-transmittal document identifying submittal items and the supporting documents. The first step in reviewing a submittal is the intake process of the transmittal form, ENG Form 4025-R (4025). This is the transmittal document that identifies the items that are being submitted.

After selecting the transmittal item, a view of the submittal items attached in addition to the secondary reviewers will be assigned to work on this transmittal along with the Primary Reviewer.



To work on a transmittal, select an item and click on the *Edit* button or double click on the item.



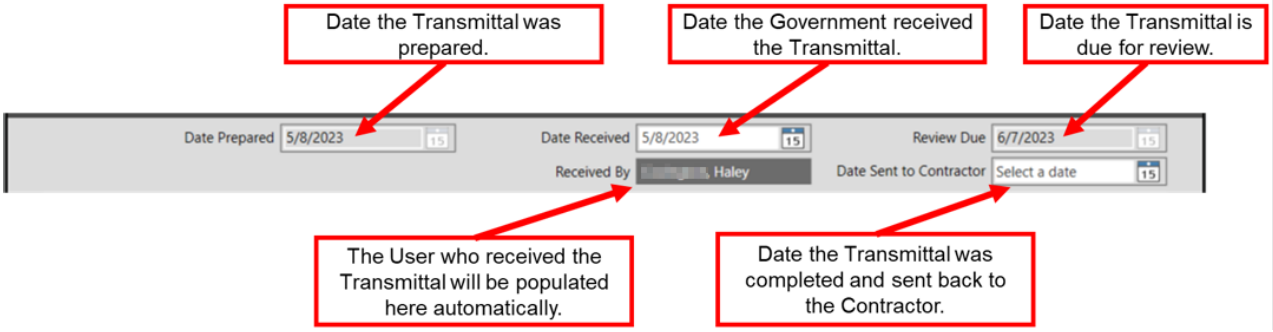


Note: The *Signed* column will populate with the name of the user who signed the 4025 form. However, no name will show in the *Signed* column if the 4025 was signed prior to 5/18/21.

The Transmittal Edit screen sections are reviewed below. At the topmost level, clicking on the *4025 Report* and the *Gov't Remarks* buttons will generate previews of the reports without any signatures.

Note: The 4025 can be found in the Shared Document Package section at the bottom of the view. This is one location where Contractors can add extra documents to the transmittal.

The next section holds the dates that correlate to the transmittal.



Date Prepared: The date the Contractor prepared the transmittal.

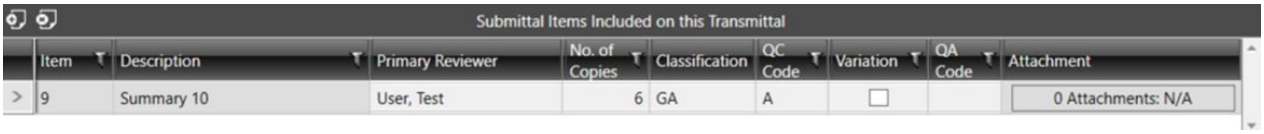
Date Received: This date tracks when the Government received this transmittal.

Review Due: This date tracks when the review is due.

Received By: The User who receives the transmittal will automatically be populated here, and the field will be read-only.

Date Sent to Contractor: This date tracks when the transmittal was completed and returned to the Contractor. This date is automatically generated and cannot be manually edited by users.

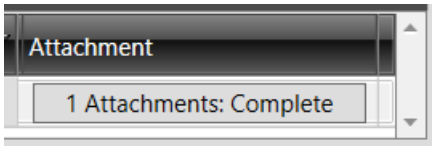
The *Submittal Item Included on this Transmittal* section holds the list of submittals assigned to the Transmittal and is one place where the Contractor can add attachments to the Transmittal pertaining to each item.

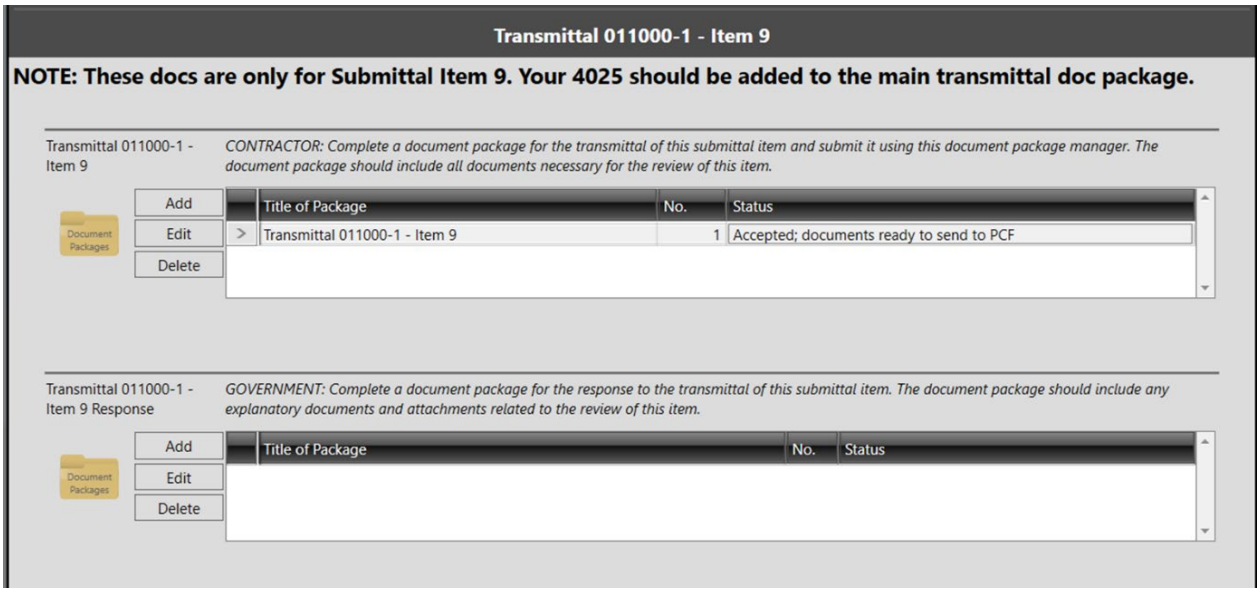


> *Note*: Where extra documents are added to the transmittal is dependent upon to District Policy, if no policy is present, then location is based on preference. However, it is highly recommended that Contractors add the extra documents in the *Attachments* button found to the right of the submittal items included in the transmittal section.

If there are attachments for a submittal item, click on the *Attachments* button to open the Document Packages for that item. An example of this view is provided below. In the Contractor Document Package(s), double click on an item to open it and view the attachments inside. Once all documents are reviewed and acceptable, accept the Document Package and click the *Back* button two times to return to the transmittal edit view. Do this for all submittal items with attachments.

Once accepted, the attachment status in the transmittal edit view will display as “Accepted; documents ready to send to PCF”.





Item: The item number of the submittal(s) assigned to this transmittal.

Description: A short description of the submittal assigned to this transmittal.

Primary Reviewer: The primary reviewer responsible for gathering all information regarding comments for this transmittal. The primary reviewer will usually work with any assigned secondary reviewers to construct the final comments for the transmittal.

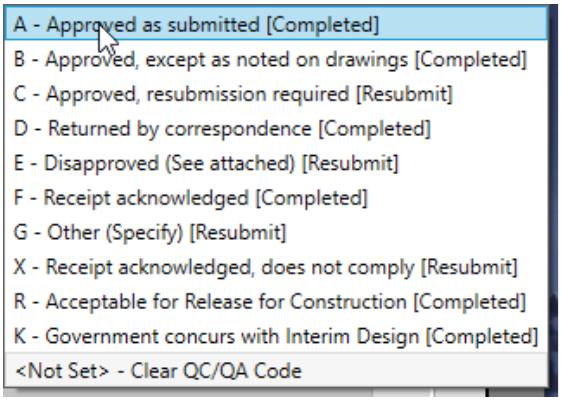
No. of Copies: The number of copies for this submittal.

Classification: The classification type that is assigned to this submittal item.

QC Code: The grade that the Contractor gives this submittal item. Most often this will be an “A”.

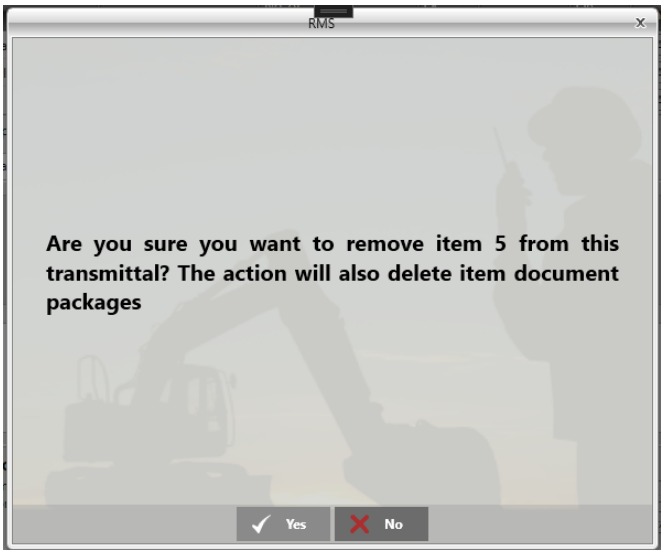
Variation: A checkbox indicating variation.

QA Code: This is the grade given by the Government once the review of the submittal item has been completed. All submittal items must receive a grade before the transmittal can be completed.

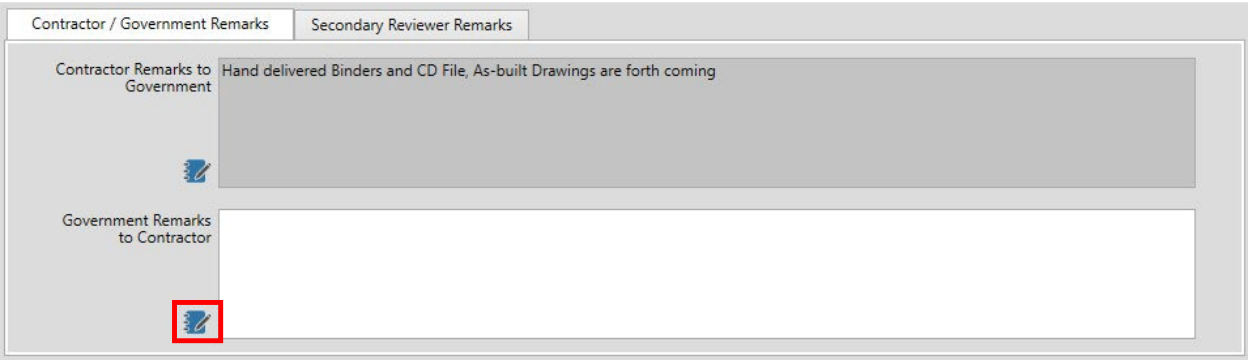


Note: If the Government requires that the Contractor resubmit the transmittal after making changes, choose the appropriate code from the list above that reflects the reason for resubmission requirement.

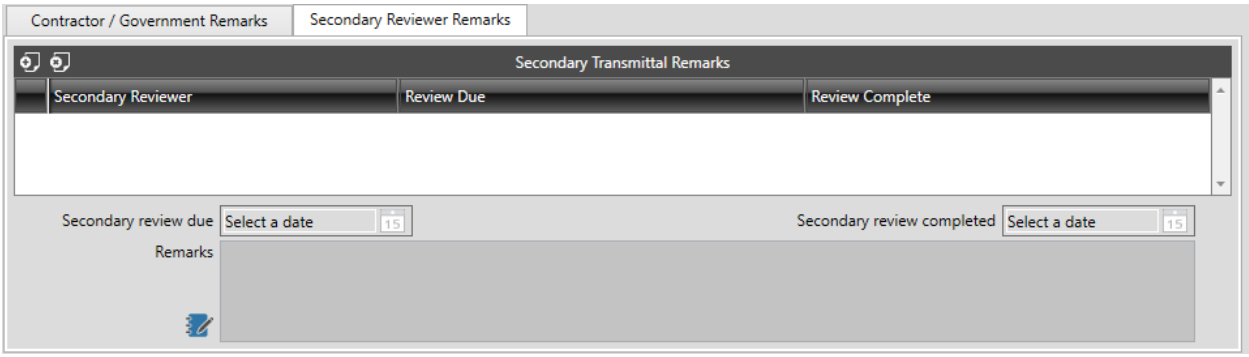
Attachment: The attachment assigned to the submittal item. Each submittal item can be assigned multiple attachments pertaining to the transmittal in question. If a submittal item is removed from the transmittal, any associated Document Packages and the contained contents will also be deleted as indicated in the prompt provided.



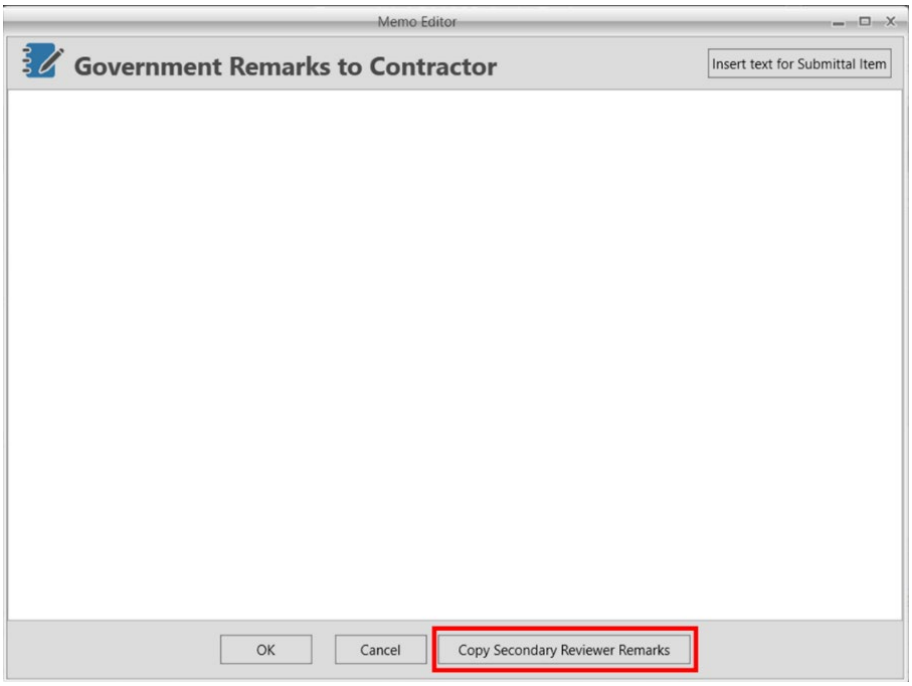
In the ***Contractor / Government Remarks*** tab, the comments from the Contractor are displayed. Government Remarks can be added to the Contractor, as well. The Primary Reviewer assigned to the transmittal will usually orchestrate all comments to be sent to the Contractor.



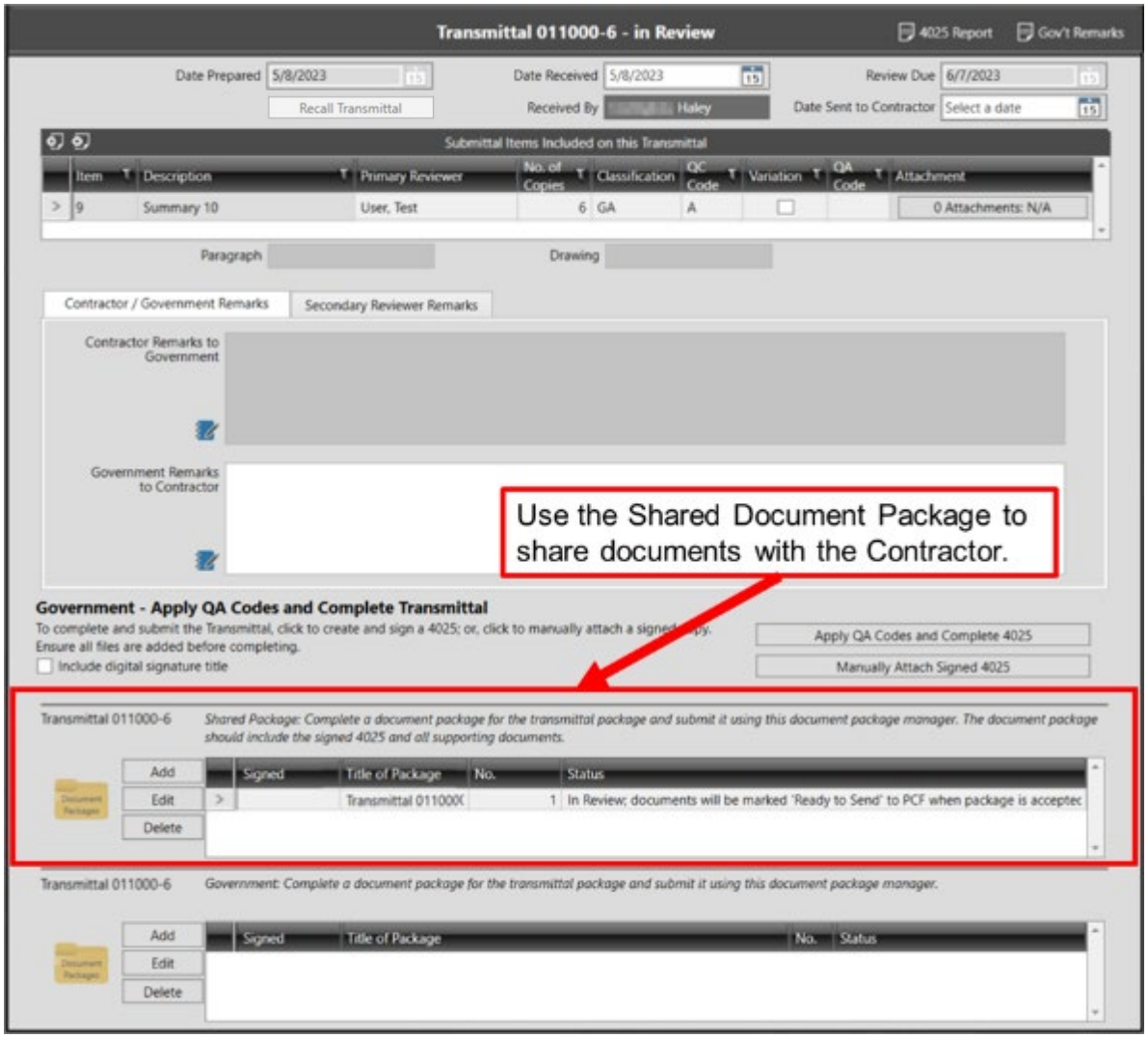
During a review of the transmittal, it is not uncommon to have several reviewers for each of the submittal item assigned. In this case, the additional reviewers are added as Secondary Reviewers.



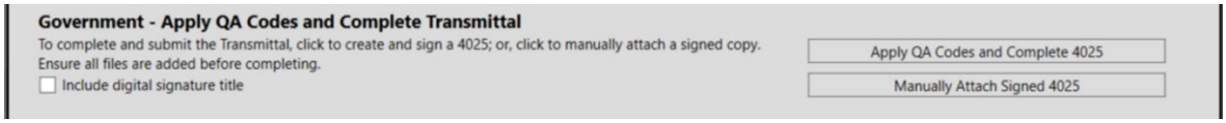
The Primary Reviewer will then compile remarks from all Secondary Reviewers and include those in the primary Government Remarks field. This can be done by clicking on the notebook icon next to the *Government Remarks to Contractor* field (shown in the first image in the *Attachment* section) and selecting the *Copy Secondary Reviewer Remarks* button.



Note: If the Government wishes to share documents with the Contractor, documents must be added in the Shared Document Package.



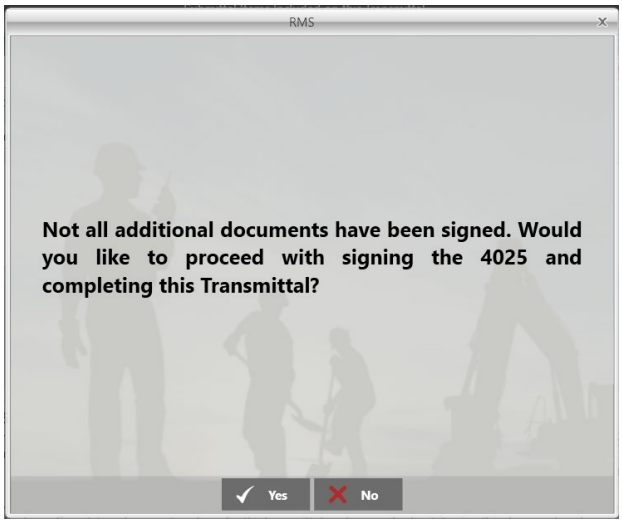
The next section applies QA Codes and completes the ENG 4025.



Caution: Clicking on either of the buttons shown above will lock the Document Packages, preventing documents from being deleted, added, or edited. Only click those buttons once all documents have been added to the Document Packages.

Note: Submittal items **cannot** be added nor removed from a transmittal once the transmittal has been submitted to the Government.

If there are documents left unsigned in any of the Document Packages, included in the transmittal, a window will appear to let the User know. Click *Yes* to proceed with signing or click *No* to return to the Transmittal Edit View.



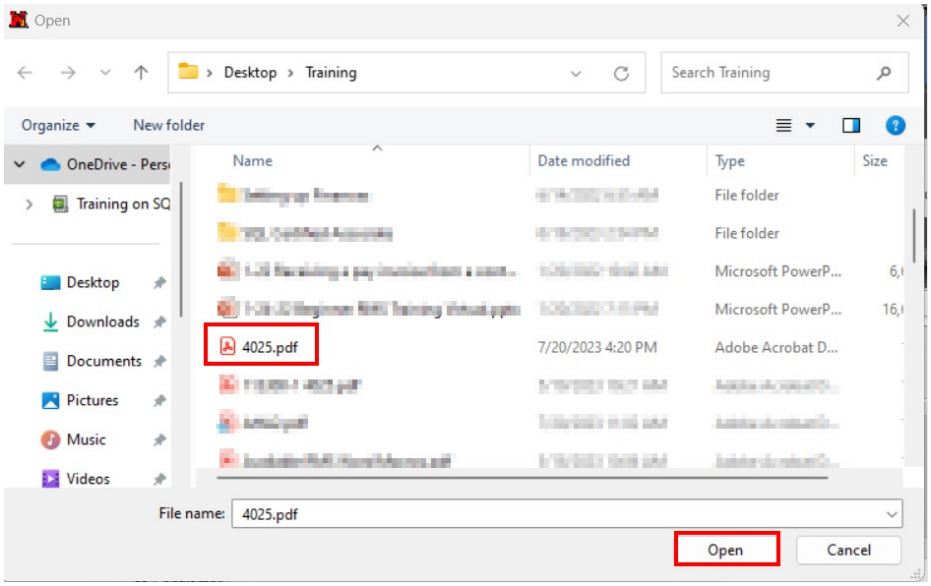
> *Note*: If the Contractor signed the 4025 manually, then the Government will only be able to sign the 4025 manually as well. Additionally, if the Government chooses to sign the 4025 manually, the QA codes will need to be applied manually as well. Many users choose to use Adobe Sign and fill to add these codes manually to the 4025

The submittal item(s) are also checked to ensure all QA Codes have been assigned. If all QA Codes were not assigned, then a message will appear indicating that a QA Code is missing, as seen in the figure on the right.

Upon confirming that QA Codes have been assigned and the ENG 4025 can be signed, the logged in user will have to authenticate, and a saved attachment for the ENG 4025 will be generated and included in the Shared Document Package.

Completing the process after clicking the to *Apply QA Codes and Sign 4025* button will accept all Document Packages included in the transmittal.

If using the option to *Manually Attach Signed 4025*, RMS will prompt users to upload the manually sign (or electronically signed outside of RMS) file.



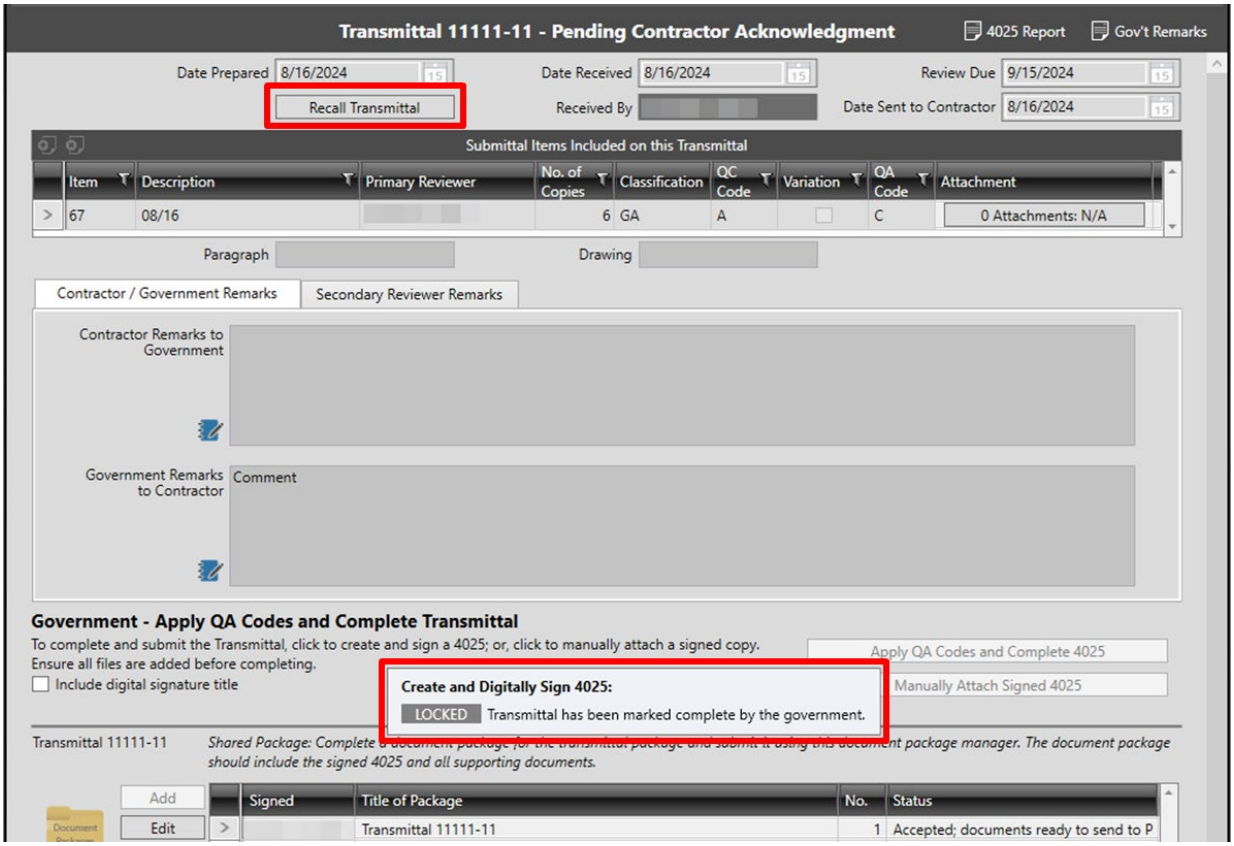
At this point, the review of the transmittal has been completed. The transmittal will then move to the *Pending Contractor Acknowledgement* section. Once the Contractor enters the *Pending Contractor Acknowledgement* date, the transmittal is considered fully completed and will move to the *Completed Transmittals* tile within the Transmittal Log. Repeat the process above for any additional transmittals that need to be reviewed.

> *Note*: Each district may have its own process for how to review a transmittal package. It will be up to the user to review the district's policy regarding the process for reviewing submittals and transmittals.

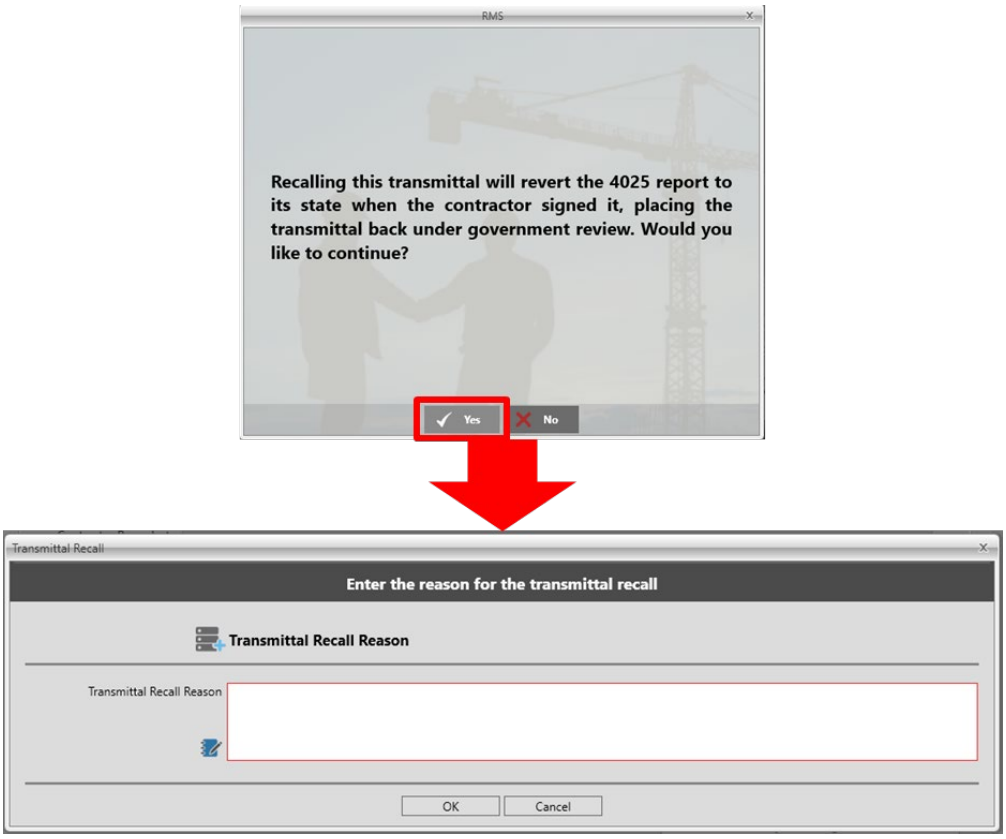
8.3.2 Recall Transmittals

There are times when completed transmittals need to be corrected. A new *Recall Transmittal* button has been provided to allow users to make those corrections. This feature is only available to the government and will only move the transmittal back to the *Transmittal in Review* status. Users will be able to update the QA codes applied, the remarks made and to add extra supporting documents that may have been missing from the original acceptance/completion process.

Once a transmittal has been reviewed and completed in GM, the *Recall Transmittal* button will become available to allow the Government to return the transmittal back to the *Transmittal in Review* status.



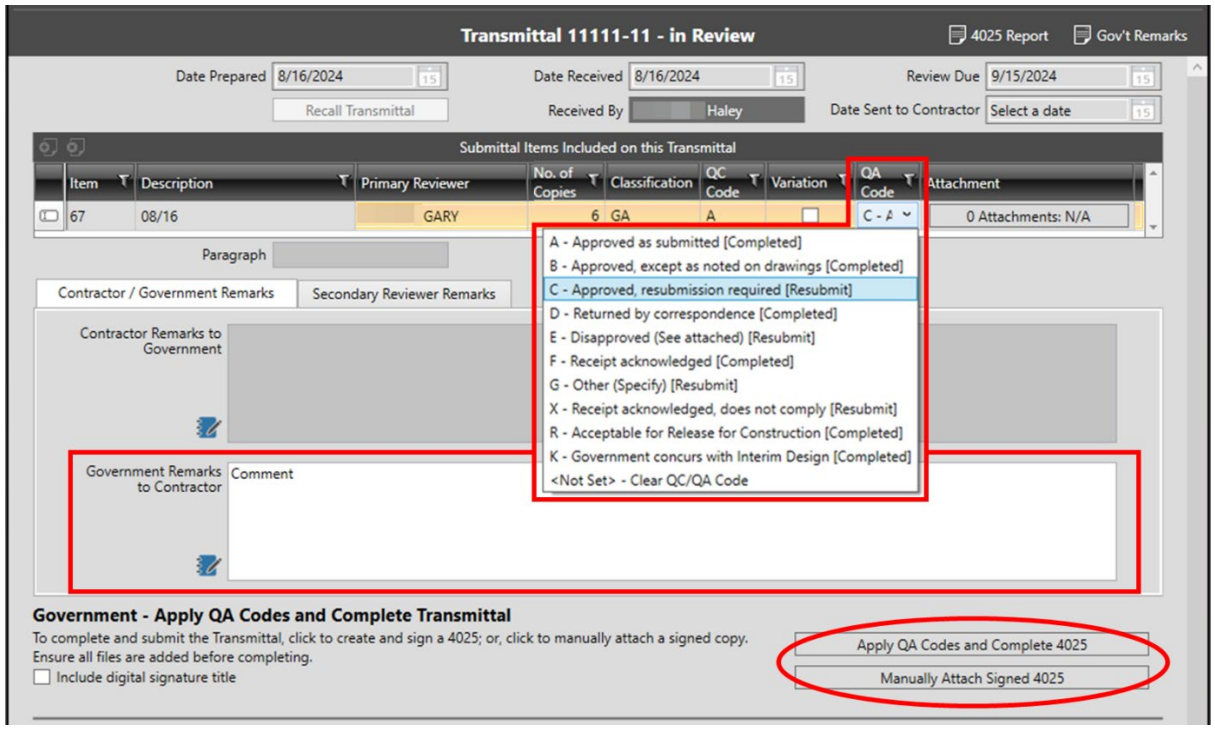
When the *Recall Transmittal* button is clicked, a *Transmittal Recall Reason* must also be entered to complete the recall.



The transmittal will be placed back into the *Transmittals in Review* status. After clicking *OK*, Users will need to navigate back to the *Transmittals in Review* sort tile to open and edit the

recalled transmittal. As stated earlier, only the *QA Code* and *Government Remarks to Contractor* fields will reactivate for editing.

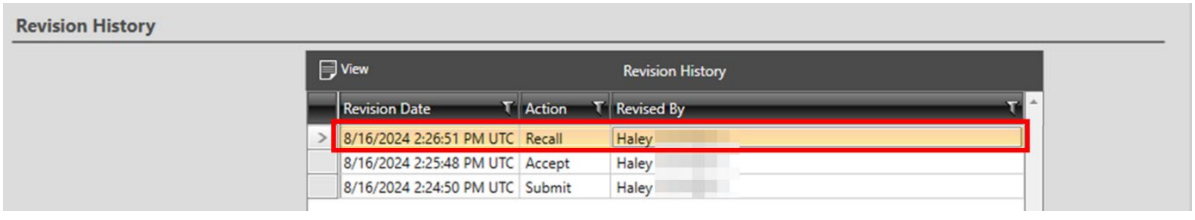
Once the necessary updates are made, the transmittal can be completed again by using *Apply QA Codes and Complete 4025* or *Manually Attach Signed 4025* buttons. See section ***8.3.1 Government Review Process*** for further information regarding transmittal completion.



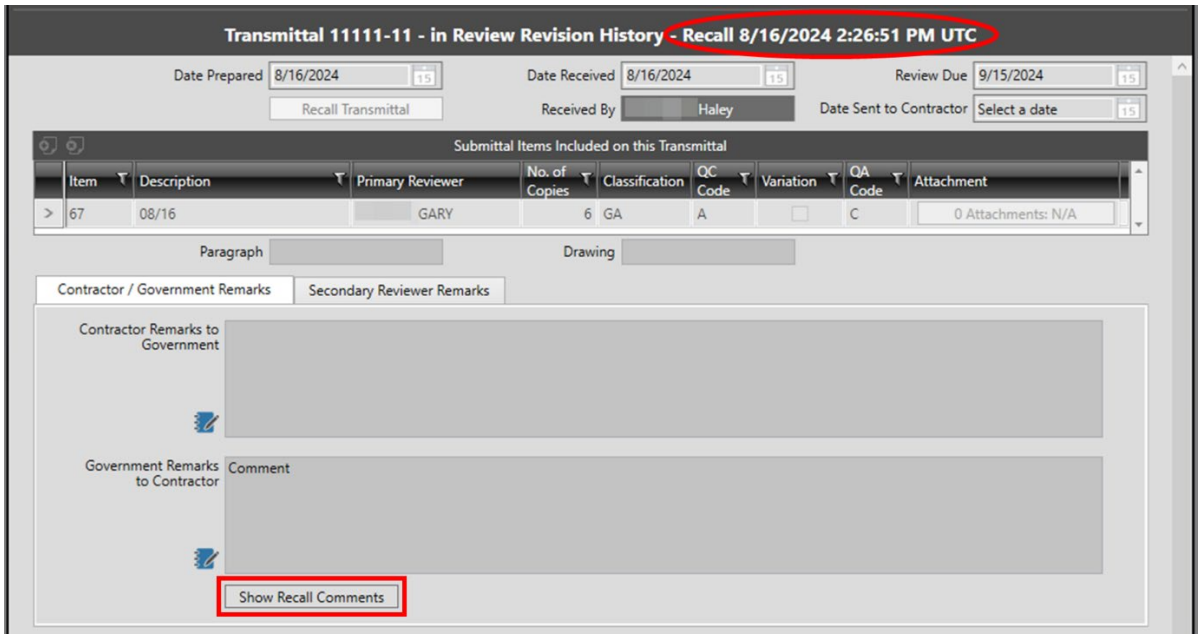
A new Document Package will be created for each new completion of the transmittal.

> *Note:* All originally or previously accepted documents will remain in the original Document Package.

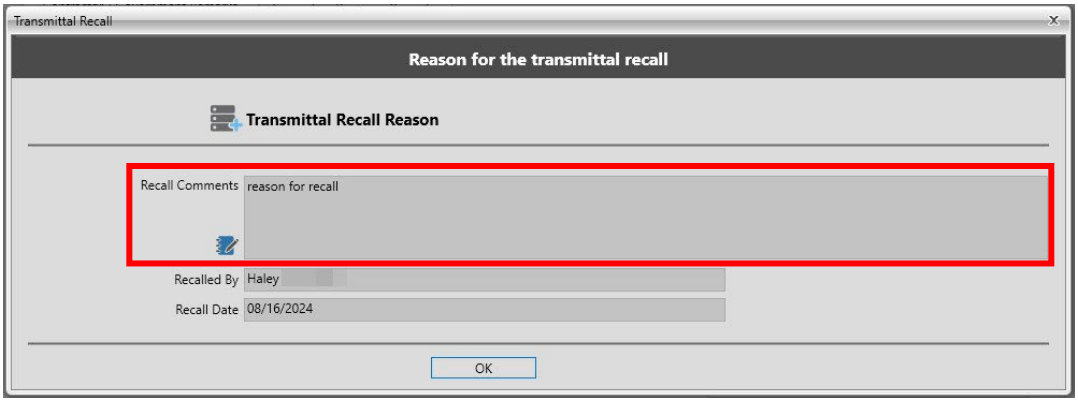
When a recall is performed, a new Recall revision entry will populate into the *Revision History* table.



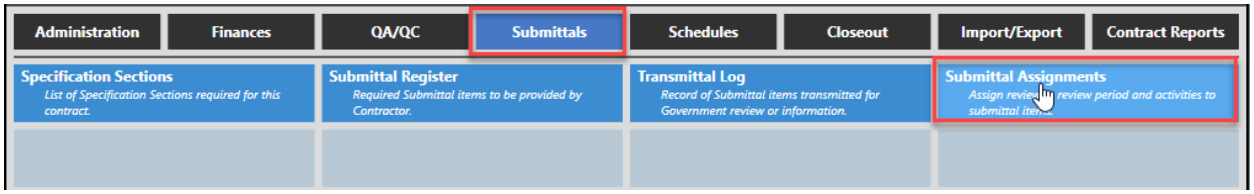
When viewing the revision history for the recalled transmittal, the *Show Recall Comments* button will be available below the *Government Remarks to Contractor* field.



Clicking on the *Show Recall Comments* button will show the *Recall Comments* entered along with the user who performed the recall and date the transmittal was recalled.



8.4 Submittal Assignments

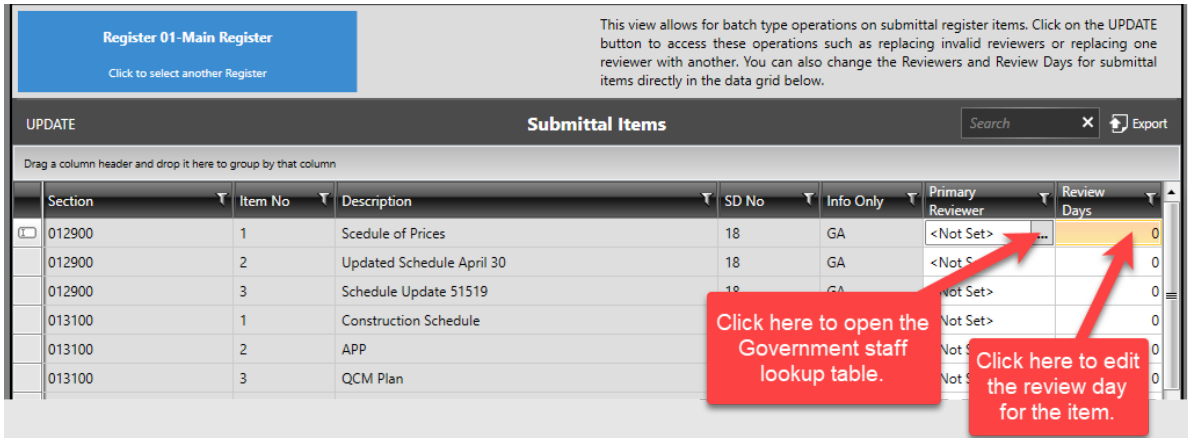


The ***Submittal Assignments*** module provides an alternate means for assigning activities to submittal items. This can be done one item at a time, or for multiple items simultaneously assigned to the same activity.

8.4.1 Single Item Assignment

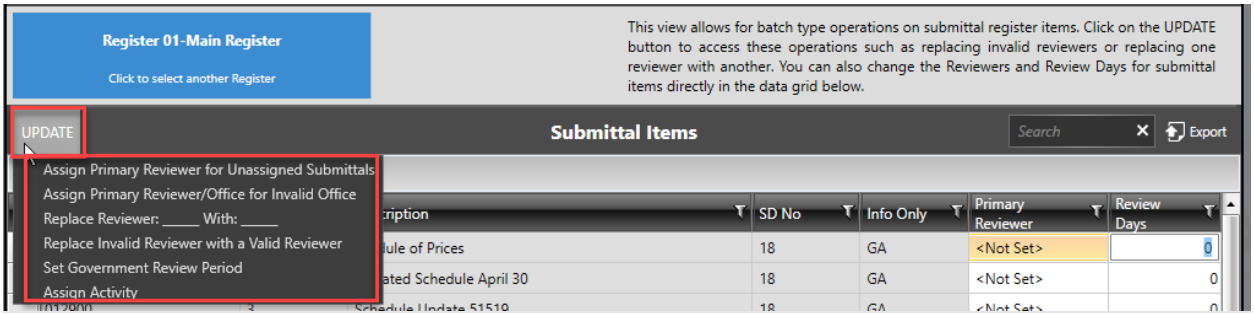
Select the item, double click in the *Primary Reviewer* column of that item, then click on the little grey box to open the Government Staff Lookup table. Select the staff member which will be assigned to the selected submittal items click on *OK*. Repeat for as many items that need to be assigned a Primary Reviewer. Do the same for the *Review days* column.

Note: No lookup table will appear for this column. Just enter the number into the edit field. Click on *Back* when done.



8.4.2 Multiple Item Assignment

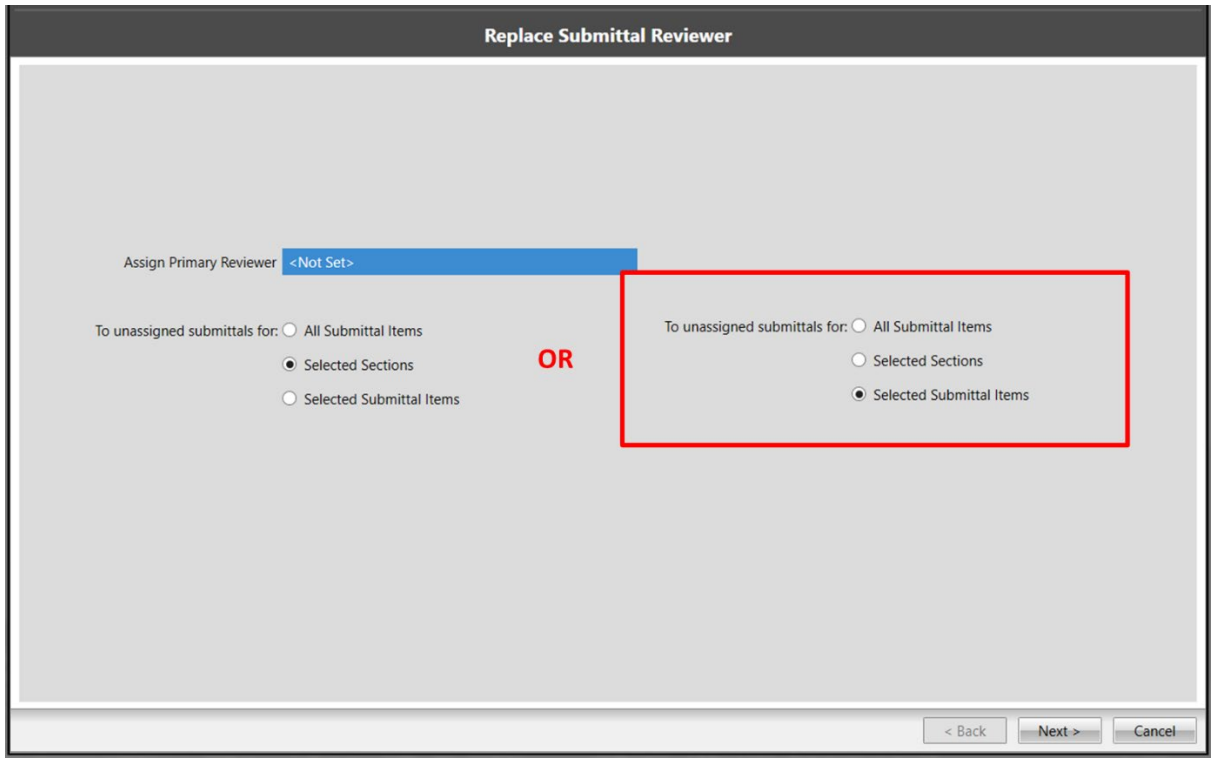
Instead of assigning a *Primary Reviewer* or *Review Period* to items individually or accessing each item individually from the submittal register, a Reviewer as well as other actions can be assigned to multiple items at the same time. Click on *UPDATE* and choose an action.

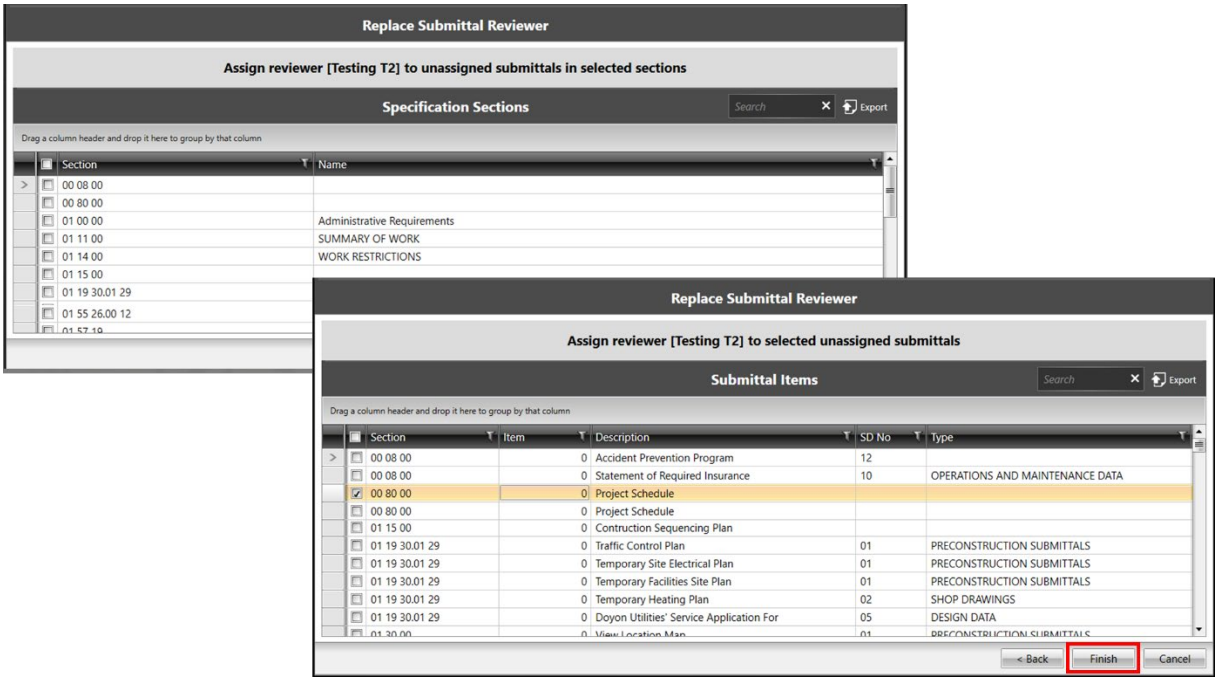


8.4.3 Assign Primary Reviewer for Unassigned Submittals

Use the radio buttons to select the range of submittal items from which to select. Click on the *Assign Primary Reviewer* blue box to open the Staff Lookup table. Select the option for which submittal items to assign to the reviewer.

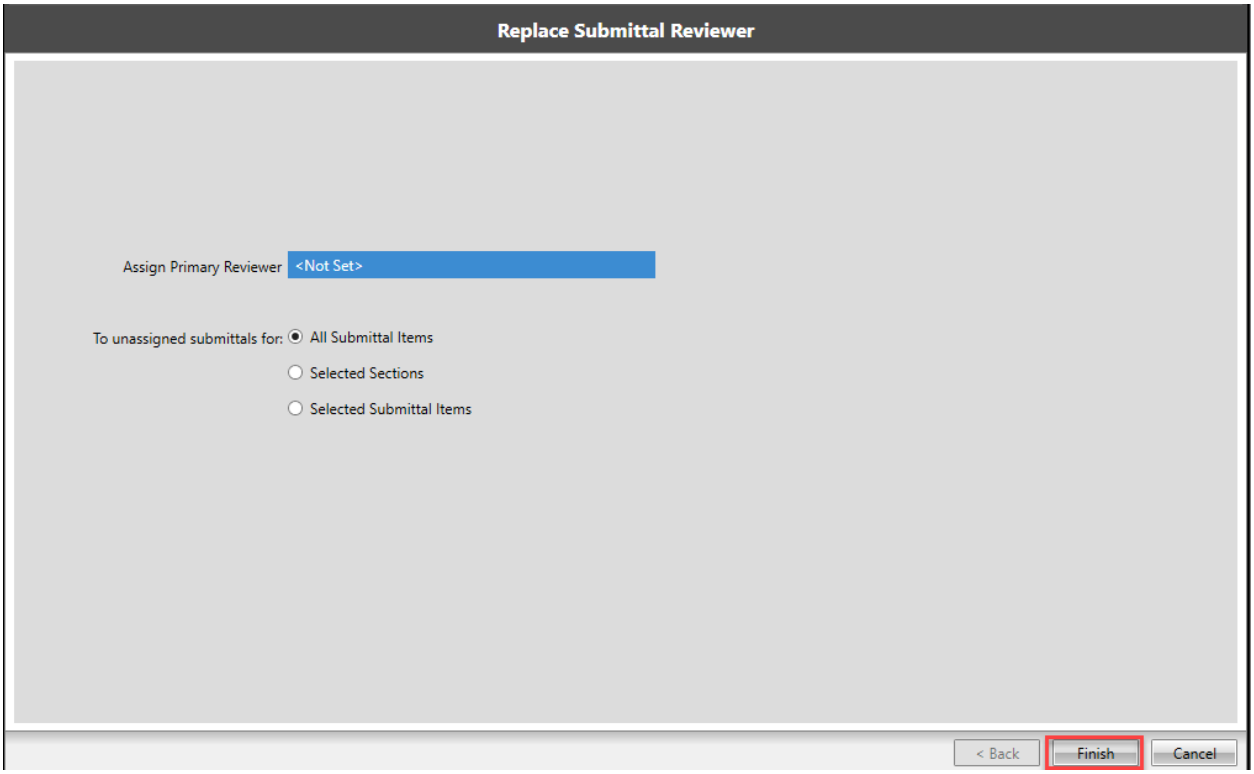
If either the *Selected Sections* or *Selected Submittal Items* option is selected, click *Next* to bring up the corresponding lookup table and make the desired selections.



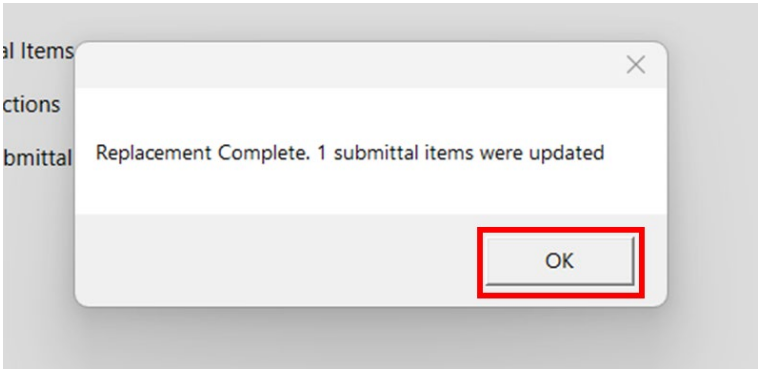


Click the *Finish* button to complete the action.

If *All Submittal Items* is selected, click *Finish*.

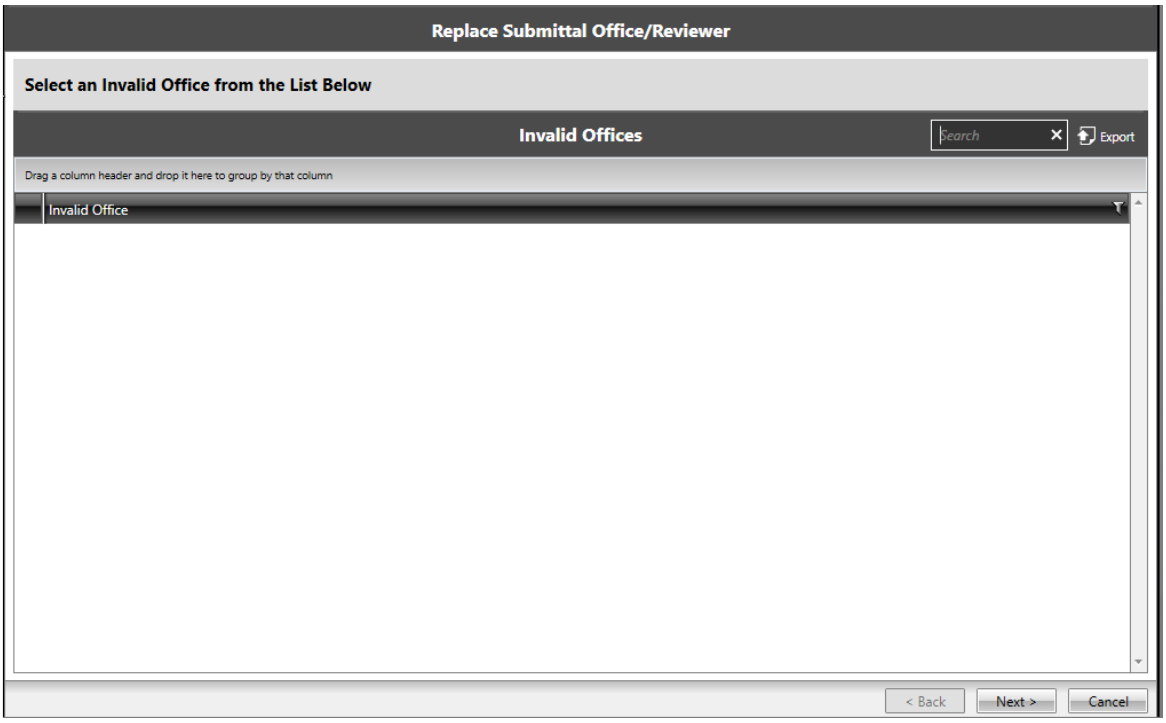


Repeat the steps as needed for each of the batch actions. A confirmation window will appear once each action has been completed. Click the *Back* button to return to the Submittal Assignments list view when all updates have been finished.

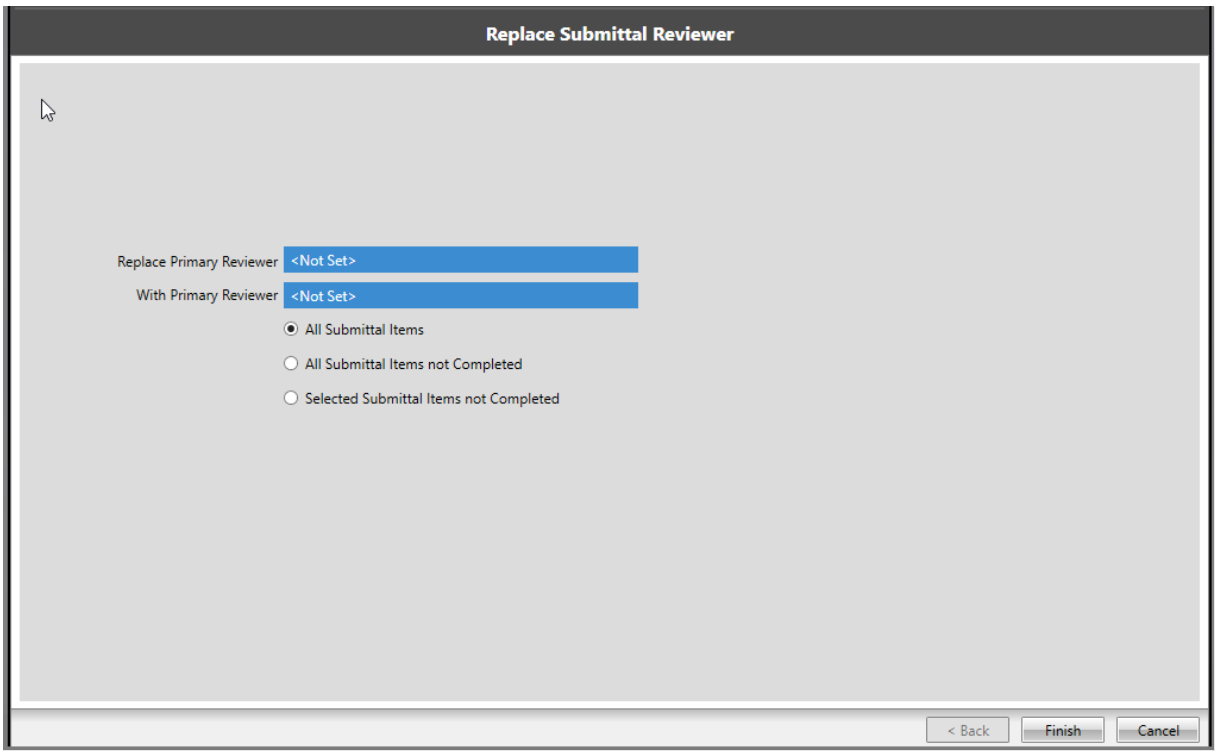


8.4.4 Other actions include:

Assign Primary Reviewer/Office for Invalid Office: Select this option to assign a primary reviewer or office to an invalid office. This option is usually used after importing a SpecsIntact File or an Excel template file.

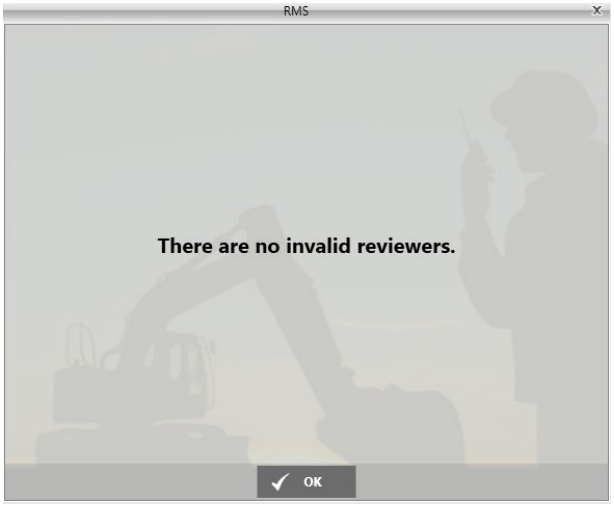


Replace Reviewer _____ with _____: Select this option to change a reviewer to another reviewer.



If either the *Selected Sections* or *Selected Submittal Items* option is selected, click *Next* to bring up the corresponding lookup table and make the desired selections. See section ***8.4.3*** for information on the Submittal lookups provided.

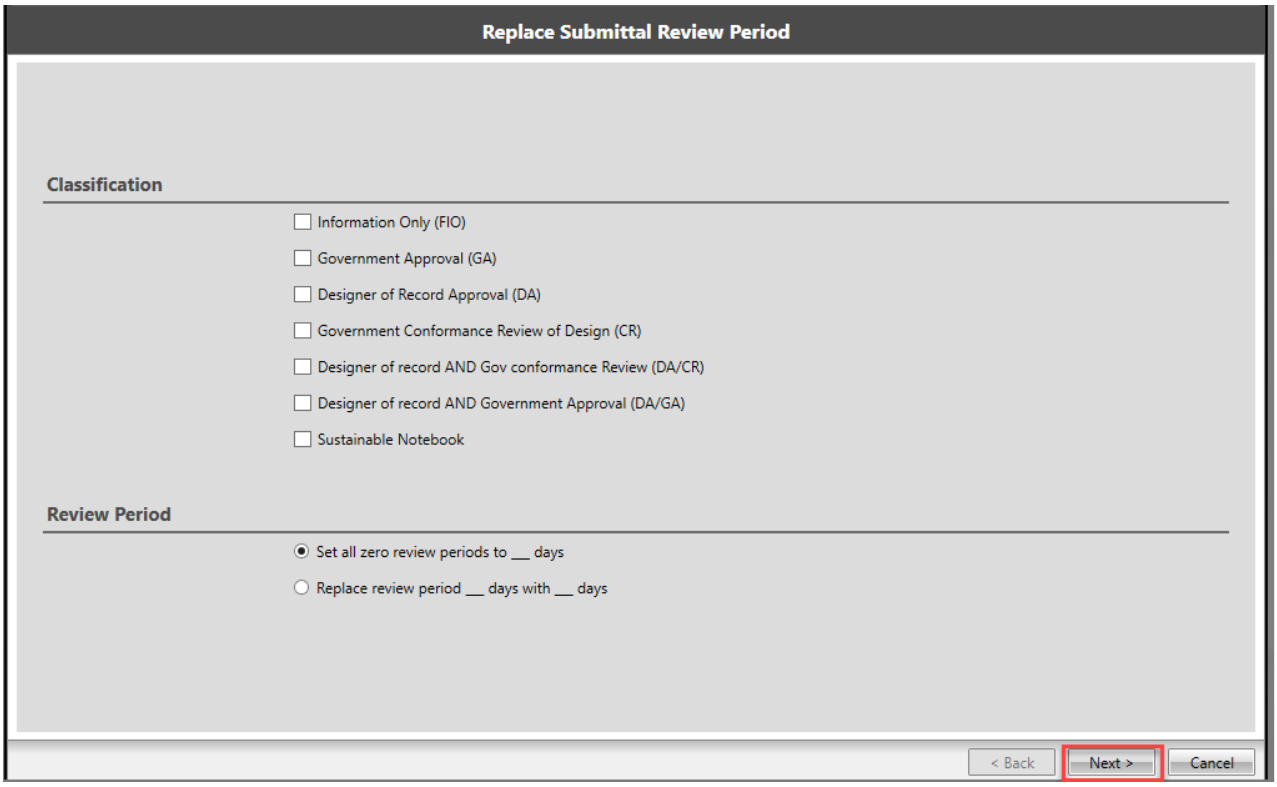
Replace Invalid Reviewer with a Valid Reviewer: Select this item to replace all invalid reviewers with a valid reviewer. If there are no invalid reviewers, the following message will display.



Usually, this is used when importing a submittal register from **SpecsIntact** or from an excel template file.

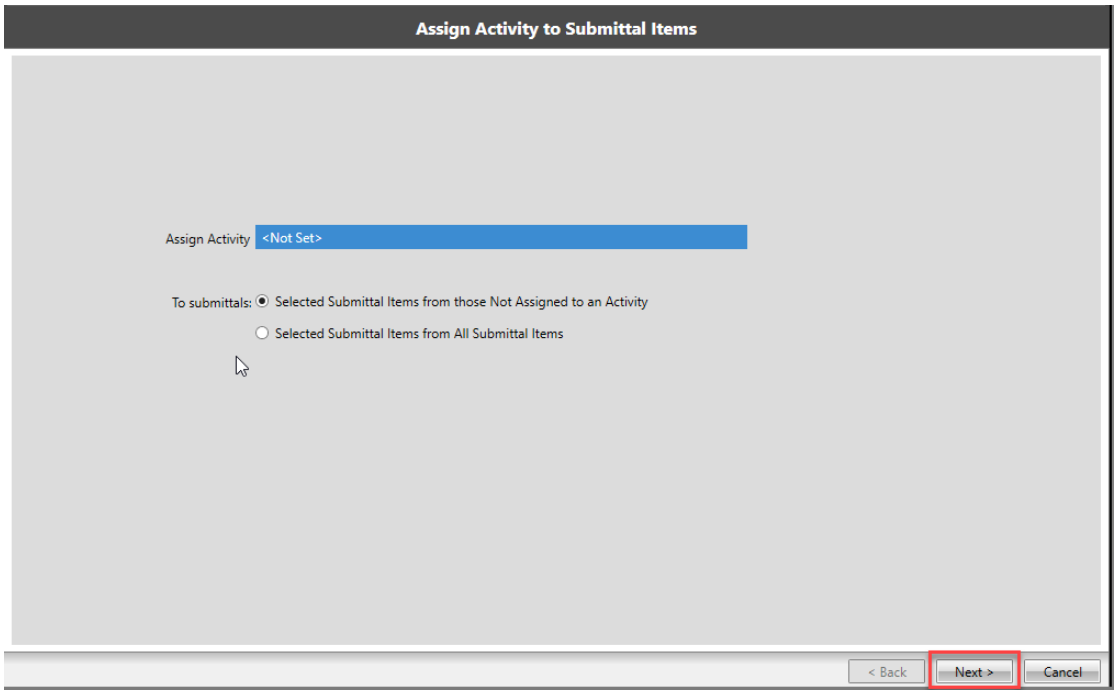
Set Government Review Period: Consists of two sections, Classification and Review Period.

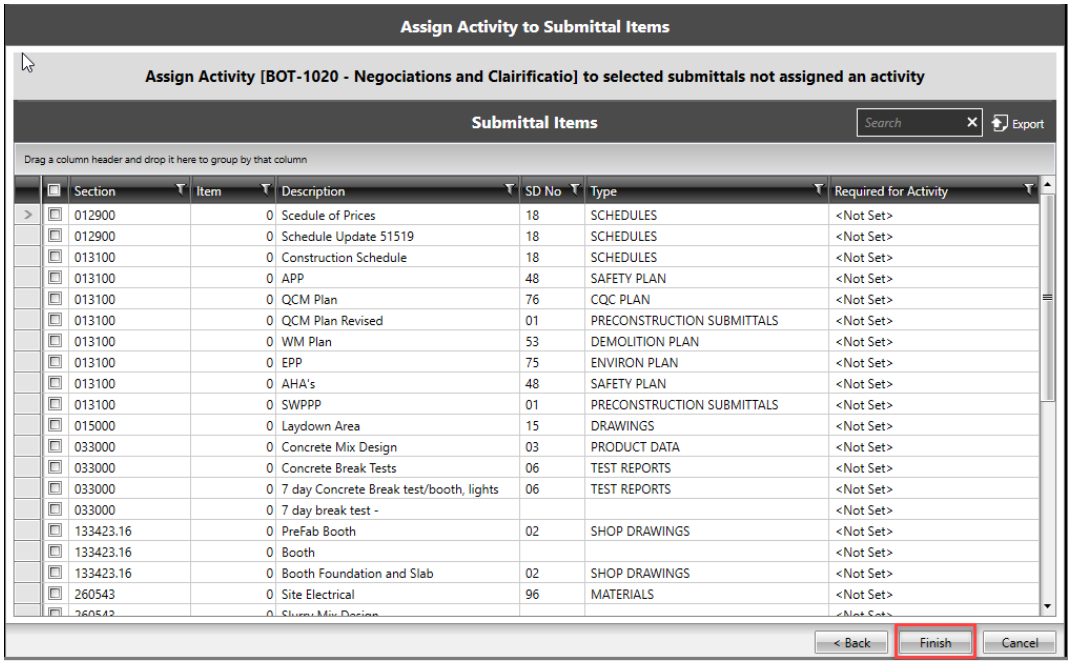
- *Classification*: Use this option to replace Review Periods for one or more classifications.



- *Review Period*: This option may be used to set all zero Review Periods to a required number of days or to replace a Review Period day with a different desired Review Period day. For example, if the review period for the submittal was set erroneously to 10 days when it should have been set to 15 days, use of the section option will update all review periods that were previously set at 10 days to 15 days.

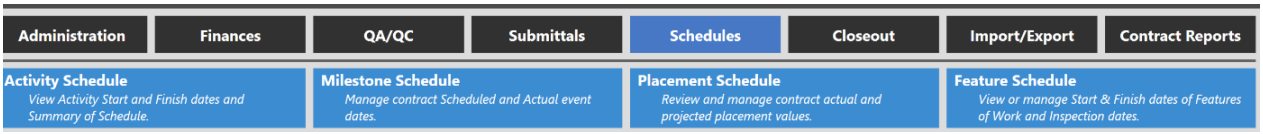
Assign Activity: Use the radio buttons to select the range of submittal items from which to select. Click on the blue box to open the Activity Lookup table. Select the Pay Activity which will be assigned to the selected submittal items, click on *Next*, then *Finish*.





After clicking the *Finish* button on the actions described above, a window will display to confirm that the action has been completed.

9.0 SCHEDULES



The RMS Schedules screens allows Government to check Contractor activities and track progress. Contractors often use SDEF files to import schedules from the internal software planning tools.

The Government needs to evaluate the Contractor's schedule with these basic principles in mind:

A schedule is only as good as the information on which it is based.

Some work sequences of various trades occur repeatedly throughout the contract. Follow-on trades do not wait for the initial trades to complete before commencing the follow-on work; different areas of the project are at different stages of completion within the sequence of work.

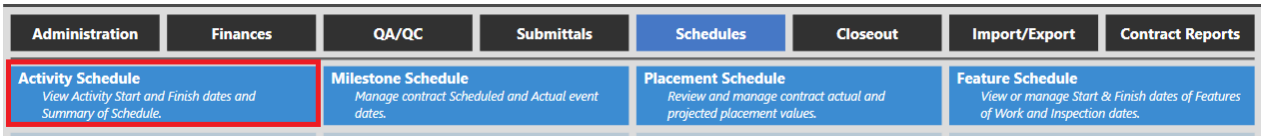
Some contracts will have essential installations that must receive extra attention even when the contract is not on the critical path.

Most of the activities may be very close to the critical path (in terms of float time) since these activities closely precede or follow the activities on the critical path.

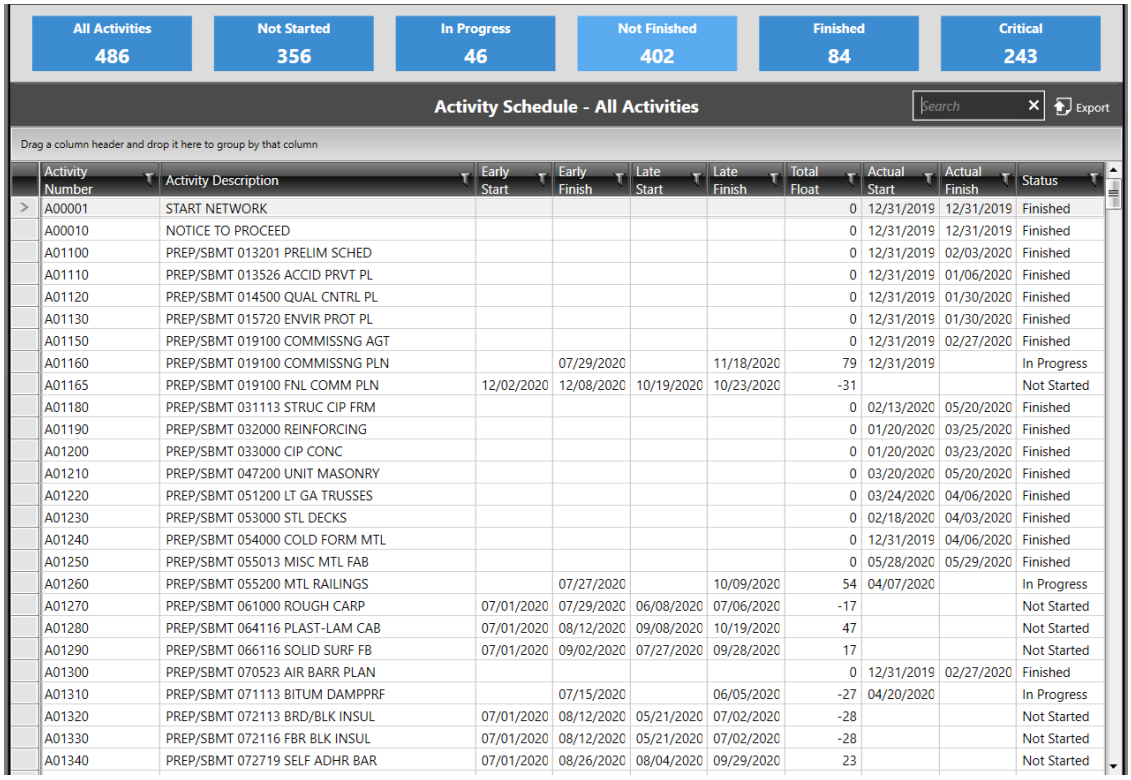
RMS provides four types of schedules for Government review and analysis:

- ***Activity Schedule***
- ***Milestone Schedule***
- ***Placement Schedule***
- ***Feature Schedule***

9.1 Activity Schedule



The work ***Activity Schedule*** is the schedule used at the jobsite to forecast projected need dates for submittals, materials, equipment, work crews, testing schedules, 3-Phase inspections, etc.



Activity Number	Activity Description	Early Start	Early Finish	Late Start	Late Finish	Total Float	Actual Start	Actual Finish	Status
A00001	START NETWORK					0	12/31/2019	12/31/2019	Finished
A00010	NOTICE TO PROCEED					0	12/31/2019	12/31/2019	Finished
A01100	PREP/SBMT 013201 PRELIM SCHED					0	12/31/2019	02/03/2020	Finished
A01110	PREP/SBMT 013526 ACCID PRVT PL					0	12/31/2019	01/06/2020	Finished
A01120	PREP/SBMT 014500 QUAL CNTRL PL					0	12/31/2019	01/30/2020	Finished
A01130	PREP/SBMT 015720 ENVIR PROT PL					0	12/31/2019	01/30/2020	Finished
A01150	PREP/SBMT 019100 COMMISSNG AGT					0	12/31/2019	02/27/2020	Finished
A01160	PREP/SBMT 019100 COMMISSNG PLN		07/29/2020		11/18/2020	79	12/31/2019		In Progress
A01165	PREP/SBMT 019100 FNL COMM PLN	12/02/2020	12/08/2020	10/19/2020	10/23/2020	-31			Not Started
A01180	PREP/SBMT 031113 STRUC CIP FRM					0	02/13/2020	05/20/2020	Finished
A01190	PREP/SBMT 032000 REINFORCING					0	01/20/2020	03/25/2020	Finished
A01200	PREP/SBMT 033000 CIP CONC					0	01/20/2020	03/23/2020	Finished
A01210	PREP/SBMT 047200 UNIT MASONRY					0	03/20/2020	05/20/2020	Finished
A01220	PREP/SBMT 051200 LT GA TRUSSES					0	03/24/2020	04/06/2020	Finished
A01230	PREP/SBMT 053000 STL DECKS					0	02/18/2020	04/03/2020	Finished
A01240	PREP/SBMT 054000 COLD FORM MTL					0	12/31/2019	04/06/2020	Finished
A01250	PREP/SBMT 055013 MISC MTL FAB					0	05/28/2020	05/29/2020	Finished
A01260	PREP/SBMT 055200 MTL RAILINGS		07/27/2020		10/09/2020	54	04/07/2020		In Progress
A01270	PREP/SBMT 061000 ROUGH CARP	07/01/2020	07/29/2020	06/08/2020	07/06/2020	-17			Not Started
A01280	PREP/SBMT 064116 PLAST-LAM CAB	07/01/2020	08/12/2020	09/08/2020	10/19/2020	47			Not Started
A01290	PREP/SBMT 066116 SOLID SURF FB	07/01/2020	09/02/2020	07/27/2020	09/28/2020	17			Not Started
A01300	PREP/SBMT 070523 AIR BARR PLAN					0	12/31/2019	02/27/2020	Finished
A01310	PREP/SBMT 071113 BITUM DAMPPRF		07/15/2020		06/05/2020	-27	04/20/2020		In Progress
A01320	PREP/SBMT 072113 BRD/BLK INSUL	07/01/2020	08/12/2020	05/21/2020	07/02/2020	-28			Not Started
A01330	PREP/SBMT 072116 FBR BLK INSUL	07/01/2020	08/12/2020	05/21/2020	07/02/2020	-28			Not Started
A01340	PREP/SBMT 072719 SELF ADHR BAR	07/01/2020	08/26/2020	08/04/2020	09/29/2020	23			Not Started

The level of detail (i.e., form footings, set re-bar, place concrete) is not very useful for the customer or those not tasked with the day-to-day scheduling operations at the jobsite. It would not make sense to duplicate this schedule in P2. These can be filtered by current progress on each activity by clicking on *Not Started*, *In Progress*, *Not Finished*, *Finished*, or *Critical*.

> *Note:* The *Critical* tile will only appear when the Activity Schedule has been imported using an SDEF file.

> *Note:* The view above is for a contract set up for an imported Activity Schedule. See ***Manually Entered Schedules*** for information regarding manually entered schedules.

For instructions on setting up a contract for use with manually or imported activity schedule types, please see the ***Contract Setup*** module in volume 1 of this manual.

9.1.1 Imported Schedules

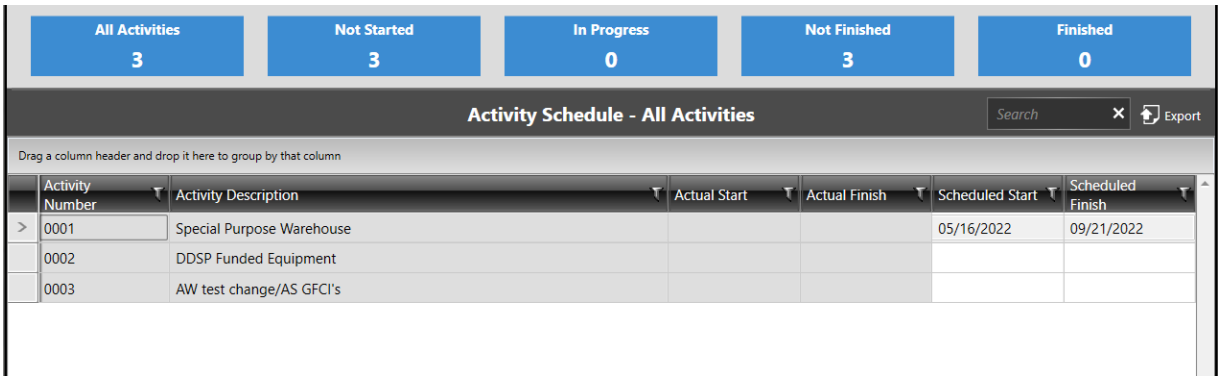
The Activity Schedule usually comes from a Contractor's Network Analysis System (NAS), a system such as Oracle Primavera or Microsoft Project by exporting a schedule to either an exported SDEF (Standard Data Exchange Format) or XML file. At this time, RMS only accepts XML files that were exported from Primavera.

Activity codes are assigned to each activity in the scheduling software and populate via the SDEF/XML imported file into RMS, such as seen in the above image. All the Early/Late Start and Finish dates populated in the above image only come from the NAS. Moreover, while it is best practice for the Actual Start and Finish dates to come from inside of the QC daily reports, those dates can be imported with the Contractor's NAS import based on the settings chosen in the ***Contract Setup*** module see the section 5.7 for Contract Setup in Volume 1 of this manual for instructions on using this setting. The status displayed in the Activity Schedule will change when the Actual Start and or Finish dates are entered.

The view in the section above displays an activity schedule as it appears when imported using a NAS.

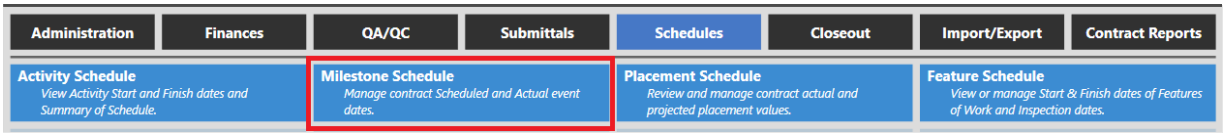
9.1.2 Manually Entered Schedules

The view below shows an Activity Schedule on a contract set up for manually entered schedules.



In this type of activity schedule, users, both Contractor and Government, can enter the *Scheduled Start* and *Scheduled Finish* dates for each activity row manually. However, the *Actual Start* and *Actual Finish* dates will only populate when entered in a ***QC Daily Report***.

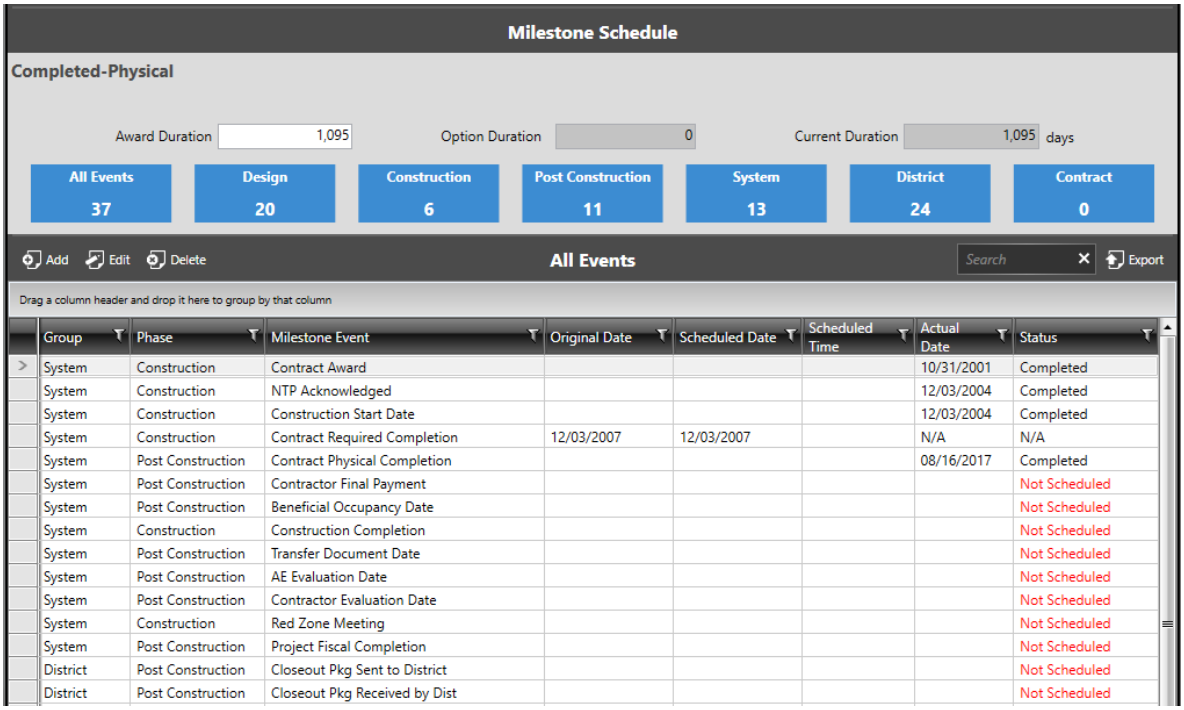
9.2 Milestone Schedule



The most important schedule to the customer is the Milestone Schedule. The ***Milestone Schedule*** module contains milestones that control how RMS module's function. Additionally, the Milestone Schedule is important for many USACE customers as it provides an overview of major events in the contract.

This schedule not only includes major system milestones like the Contract Award Date, Notice To Proceed and BOD (Beneficial Occupancy Date), but can also include important customized milestones for the customer, like partial turnover for installing customer furniture, scheduling User Training classes, O&M turnover, etc. It is critical that actual dates for system milestones are entered in the Milestone Schedule as these dates link to other modules and affect the functionality of other modules. For example, an actual date needs to be entered for the NTP Acknowledged milestone to turn on the ability to enter QA/QC reports. Which milestones affect which modules of RMS will be described in further detail below.

> *Note*: The NTP Acknowledged date determines the numbering for the QA/QC reports. The numbering starts at 1 once the actual NTP Acknowledged date is entered. If reports are entered with dates that preceed the NTP Acknowledgement date, then those numbers will be 0. In other words, if the NTP actual date is 2/2/2020 and the first report is put in on 2/5/2020, then the report number will be 3. During construction, these types of milestones are reviewed at the weekly planning meetings with the Contractor and are updated in RMS as part of the daily QA reporting process. Prior to construction award, milestone dates should come from P2 to RMS, but after construction award, the construction milestone dates should come from RMS to P2.

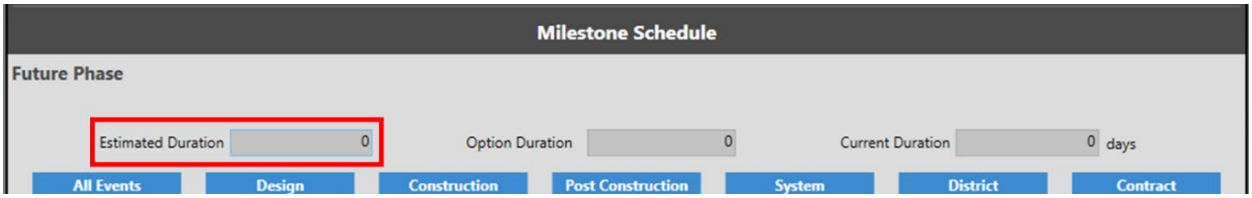


Group	Phase	Milestone Event	Original Date	Scheduled Date	Scheduled Time	Actual Date	Status
System	Construction	Contract Award				10/31/2001	Completed
System	Construction	NTP Acknowledged				12/03/2004	Completed
System	Construction	Construction Start Date				12/03/2004	Completed
System	Construction	Contract Required Completion	12/03/2007	12/03/2007		N/A	N/A
System	Post Construction	Contract Physical Completion				08/16/2017	Completed
System	Post Construction	Contractor Final Payment					Not Scheduled
System	Post Construction	Beneficial Occupancy Date					Not Scheduled
System	Construction	Construction Completion					Not Scheduled
System	Post Construction	Transfer Document Date					Not Scheduled
System	Post Construction	AE Evaluation Date					Not Scheduled
System	Post Construction	Contractor Evaluation Date					Not Scheduled
System	Construction	Red Zone Meeting					Not Scheduled
System	Post Construction	Project Fiscal Completion					Not Scheduled
District	Post Construction	Closeout Pkg Sent to District					Not Scheduled
District	Post Construction	Closeout Pkg Received by Dist					Not Scheduled

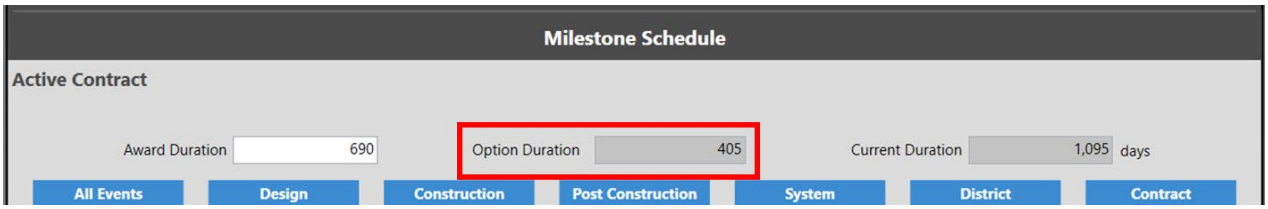
Note: The text in the upper left view of the milestone edit view is the current contract stage for the contract. In the above example, this contract's stage was phyically completed. In other words, an actual date was entered in the Contract Physical Completion milestone. For an Active, Future or other contract stage, that text area will be updated with the corresponding text: Active for Active, etc.

Award Duration: Once an Award Date has been entered for the contract, this field will display the awarded duration for the contract.

Estimated Duration: If an Award Date has not been entered for the contract, then this field will be displayed as Estimated Duration. The Estimated Duration will be displayed for a future contract, as well. If the contract is not linked to P2, then this field can be edited and will reflect the Estimated Duration title until an Award Date has been entered via a schedule import or manual entry. This duration can also come from P2 if the contract is linked without the Award Date having been entered in P2. Please follow district policy as it relates to this information.

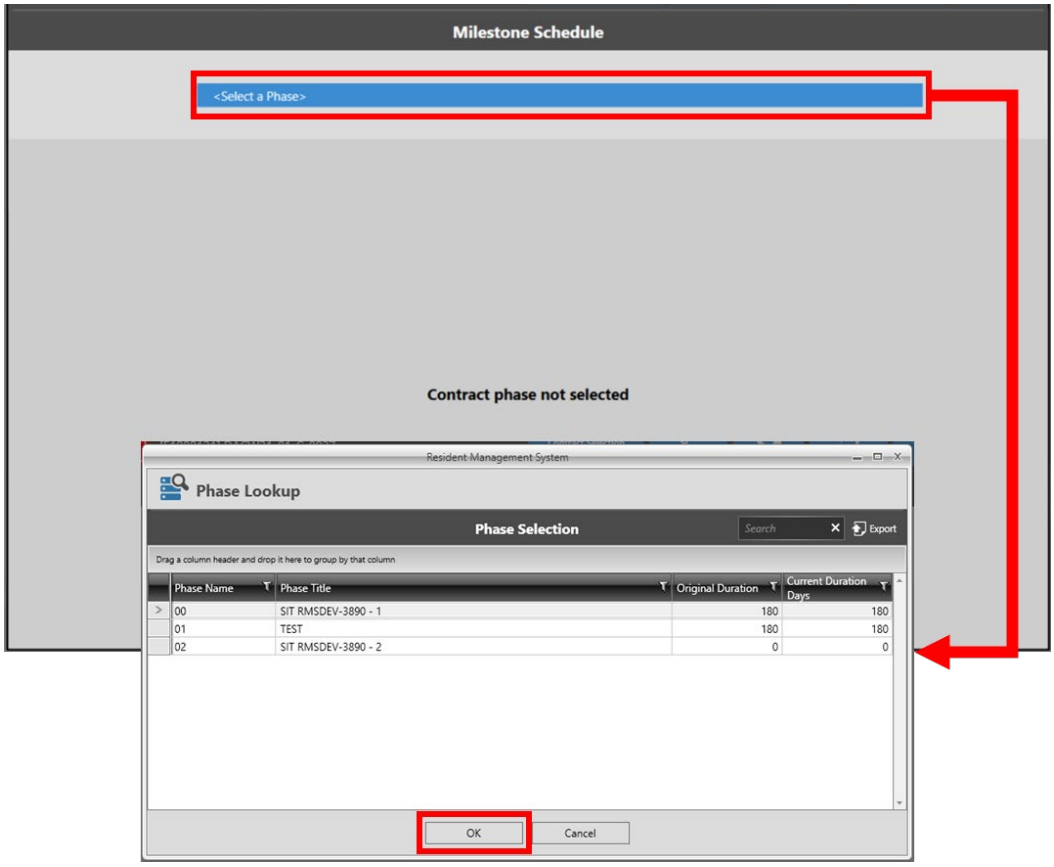


Option Duration: When a modification made to the contract impacts the duration of the contract, that new contract duration will show in this field.



Current Duration: This field will display the most current duration of the contract. If an option duration is present, then this field will display the updated duration of the contract as a result of the *Option Duration*.

Under some circumstances, opening the *Milestone Schedule* module will require a selection from a *Phase* lookup field. This prompt will appear when the contract is linked to a P2 project that has multiple phases and the *Use only one Phase* checkbox in the ***Contract Setup*** module is NOT checked. If those conditions are met, the below view will be displayed upon opening the ***Milestone Schedule*** module.

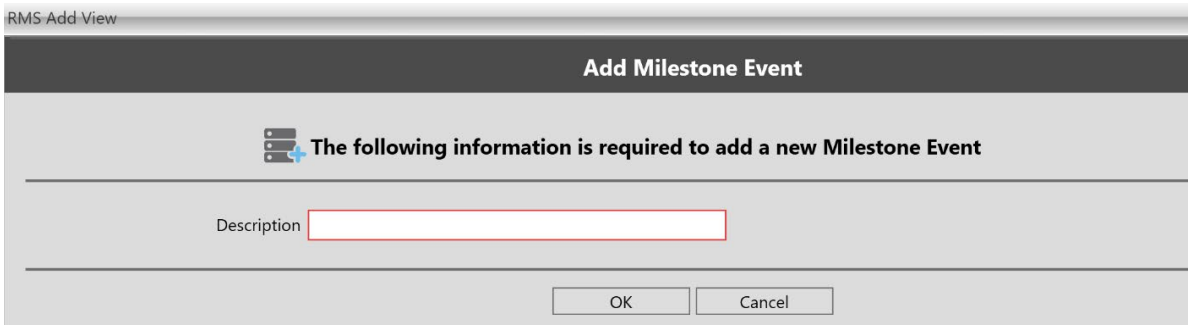


9.2.1 Adding Milestones

Milestones can be described as either mandatory or optional. The RMS program includes mandatory milestones for all contracts. These cannot be changed or deleted. A District may add mandatory milestones that will be included in all contracts in that District. These milestones can be viewed in the *District Library*. Additionally, the *Local Library* can be used at the field office level for optional milestones.

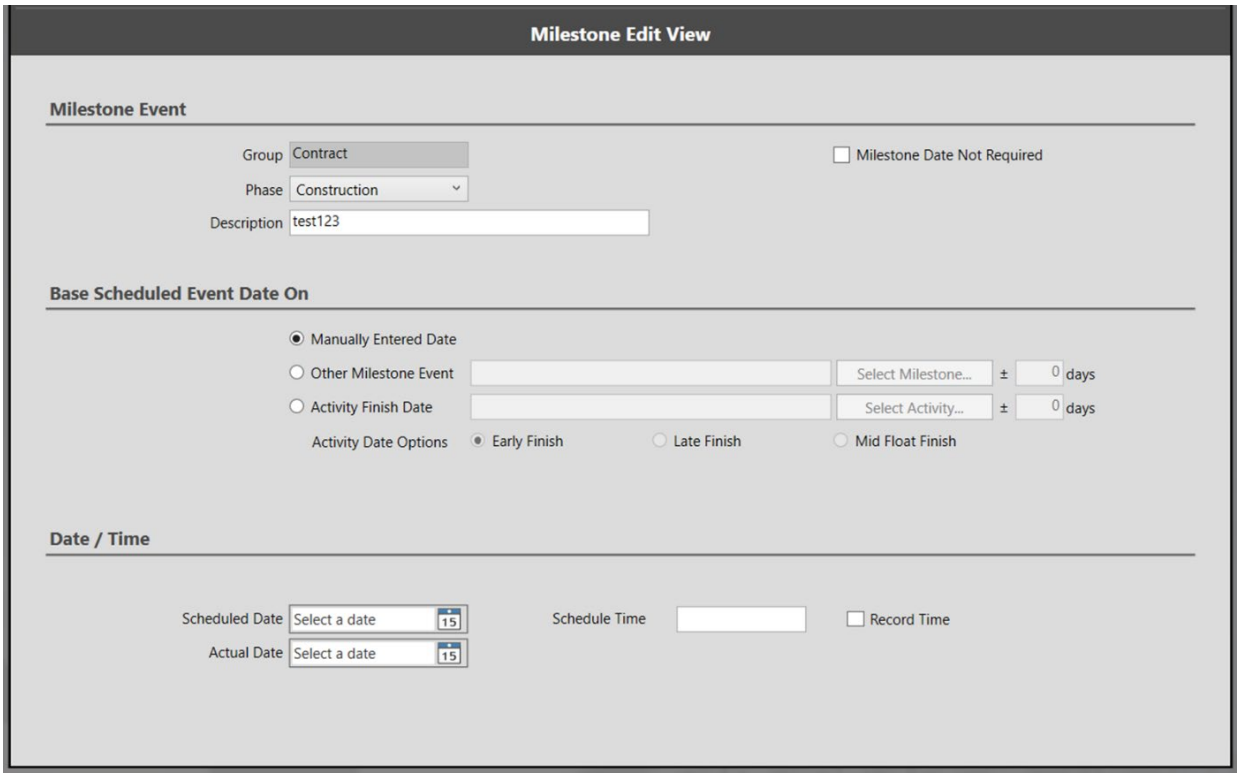
Thus, the *Milestone Schedule* in the contract reflects all the milestones from RMS, the District/Local Office libraries. Additional milestones that are unique to a contract can be added, as well. Other contracts will not be able to access these unique milestones.

Clicking on the *Add* button will open a wizard that requires the description of the new milestone to start the creation of a new milestone.

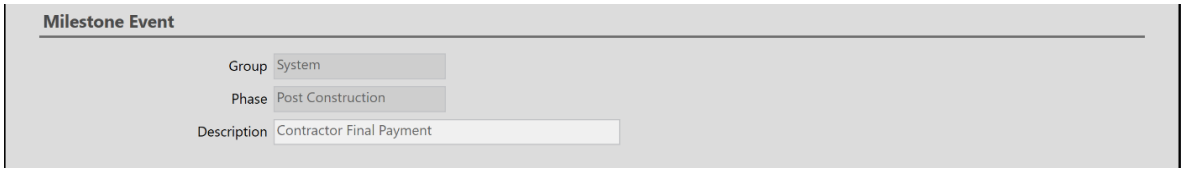


Click *OK*. The wizard will then display the edit view of the new milestone.

This is the same view when editing an existing milestone using the *Edit* button. Each milestone can be edited to set its dates.



If this milestone is a Contract Milestone, use the drop-down menu to select the event in the *Phase* field and enter the event's *Description* by typing in the text field. These fields will not be editable in the District or System Milestone Edit views.



If a date is not required, select the *Milestone Date Not Required* checkbox. This selection will remove the *Base Scheduled Event On* and *Date / Time* sections of the page.

Note: This checkbox is disabled for District milestones.

Base Scheduled Event Date On

If *Manually Entered Date* is selected, enter the *Scheduled Date* and *Schedule Time* (if appropriate).

If *Other Milestone Event* is selected, choose a milestone from the *Select Milestone…* lookup window and enter a value in the *± days* field to move the date as desired.

If *Activity Finish Date* is selected, choose the activity from the *Select Activity…* lookup window and enter a value in the *± days* field to move the date as desired. Select the appropriate option from the *Activity Date Options* below, as well.

Date / Time

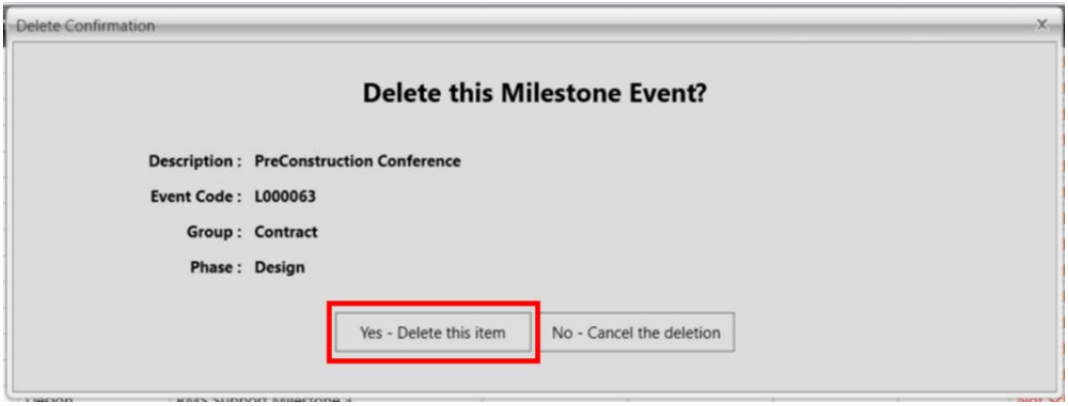
The *Schedule Date* and *Schedule Time* fields are only editable when milestone scheduled event section is set to *Manually Entered Date*.

Checking the *Record Time* checkbox will make the *Schedule Time* text box editable. Check the *Record Time* checkbox and enter *Schedule Time* there.

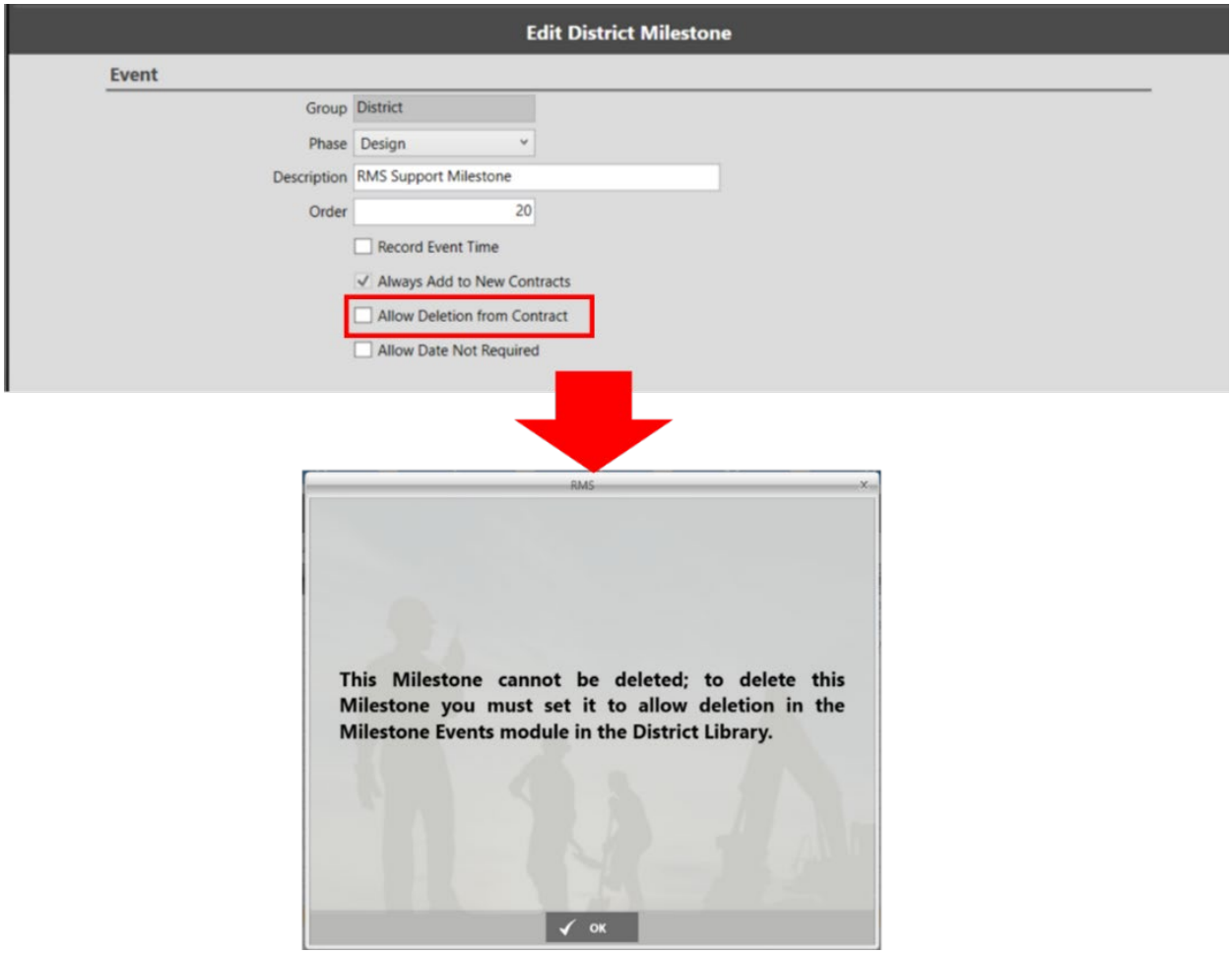
If milestone is completed, an *Actual Date* will be entered.

Click the *Back* button to save changes made.

To delete a milestone, select the milestone and click the *Delete* button, then confirm the deletion.



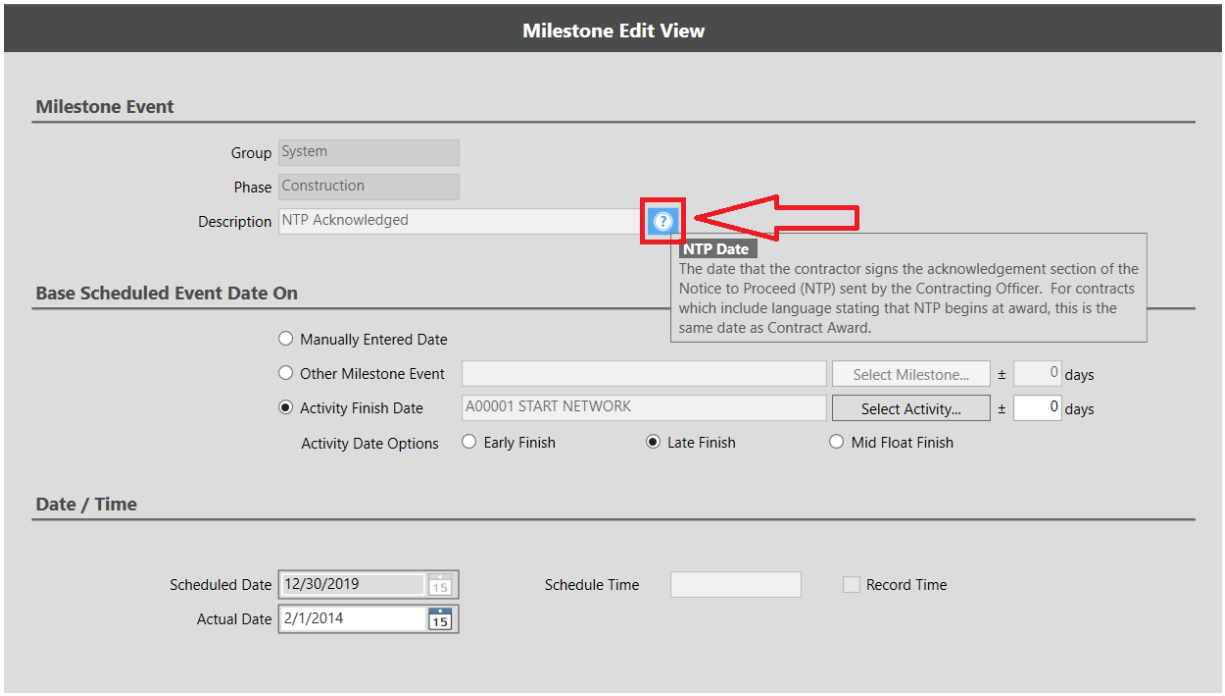
Milestone deletion cannot be performed on any System Milestones or on District Milestones that do not have the *Allow Deletion from Contract* checkbox checked within ***District Library | District Milestones***.



9.2.2 Description of System Milestones

System Milestones are the milestones created by the RMS Support Center and affect various modules in RMS. These milestones are always the only milestones that will be updated by P2 or sent from RMS to P2.

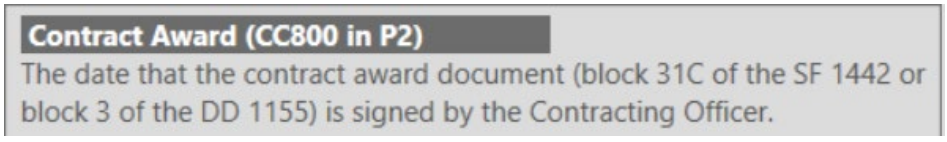
Descriptions of the milestones can be viewed by hovering the mouse pointer over the question mark icon located in the *Milestone Edit View* for each milestone. The pop-up notes are also replicated in this manual for ease of reference.



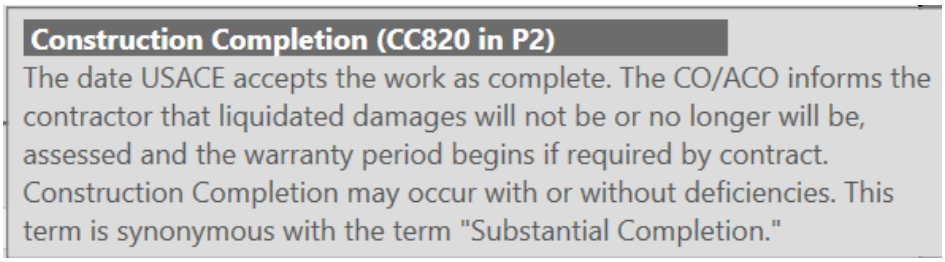
Note: These milestones are listed in alphabetical order based on phase, not necessarily the order in which the milestones will be completed. For directions on which order milestones must be completed in, please see the district policy for that contract's district.

Construction Phase:

Contract Award: This milestone determines the first change in the contract status, moving the contract from the future stage to an active stage. This happens when the Contract Award Actual Date is entered. This update will also switch the Finances tab from a Future Finances to an active Finances tab. Additionally, if the contract is linked to CEFMS, RMS will begin to automatically download CEFMS financial data at the end of every day. If the contract is linked to a P2 project, then this also initiates a change in the flow of data between P2 and RMS. Prior to this actual date being entered, milestone dates will be pushed to RMS from P2 (P2 will control the milestone dates). After the actual date is entered, RMS will push the milestone dates to P2 (RMS will control the milestone dates).

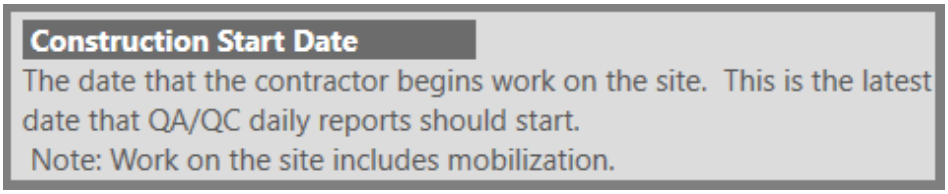


Construction Completion: This milestone is one of the options used to control the ending of payroll generation within the contract. Using this milestone as the selection in Contract Setup as the end of the contract for Payroll purposes, once an actual date is entered, then payrolls will stop. The Actual last day will also be dependent upon the days before or after this milestone were added in Contract Setup. Otherwise, any contract administrator can open the ***Contractor Payrolls*** module to generate payrolls.



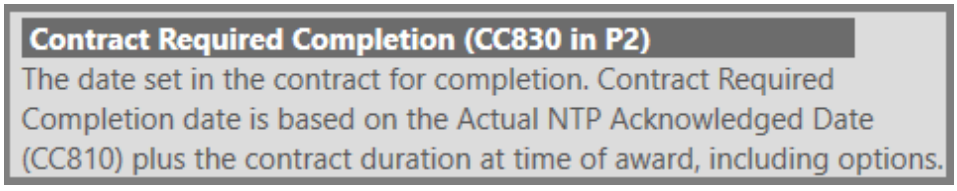
Note: If the Actual Date is entered for this milestone and no milestone has been selected for the ending of payrolls within Contract Setup, then no payrolls will be generated past this date.

Construction Start Date: The date the contactor begins work on the site. This is the latest date that QA/QC daily reports should start.



Note: Work on the site includes mobilization. It is needed for Placement Reports.

Contract Required Completion: This milestone is a calculated milestone, and no dates or changes may be made here. The *original* **Contract Required Completion** date is calculated based on the contract **NTP Acknowledged Actual** date, the **Award Duration** entered in the ***Milestone Schedule*** module, plus any modifications that change the contract duration via Award Options (see Mod Reason Codes section in Vol 2 of the Government manual for more detail). The *scheduled* **Contract Required Completion** date is calculated based on the contract **NTP Acknowledged Actual** date, **Award Duration** entered into the ***Milestone Schedule*** module, plus ALL modifications that change the **Contract Duration**, regardless of the type of modification.



NTP Date: The date that the Contractor signs the acknowledgement section of the Notice to Proceed (NTP) sent by the Contracting Officer. For contracts which include language stating that NTP begins at award, this is the same date as Contract Award. The NTP Acknowledged **Actual Date** is what allows QA and QC reports to be created, payrolls to be generated, monthly progress schedules to be updated, and payments to be entered.

NTP Date (CC810 in P2)
The date that the contractor signs the acknowledgement section of the Notice to Proceed (NTP) sent by the Contracting Officer. For contracts which include language stating that NTP begins at award, this is the same date as Contract Award.

Red Zone Meeting: The date that the first Red Zone Meeting is held. The Red Zone meeting is held, approximately 60 days before the anticipated Beneficial Occupancy Date (BOD), or not later than when 80% of construction has been completed. This milestone will only affect the summary reports in RMS and is one of the milestones sent to P2 from RMS.

Red Zone Meeting
The date that the first Red Zone Meeting is held. The Red Zone meeting is held approximately 60 days before the anticipated Beneficial Occupancy Date (BOD), or not later than when 80% of construction has been completed.

Post Construction Phase:

AE Evaluation Date: The date that the final evaluation is completed by the Government for the AE Contractor in the CPARS system.

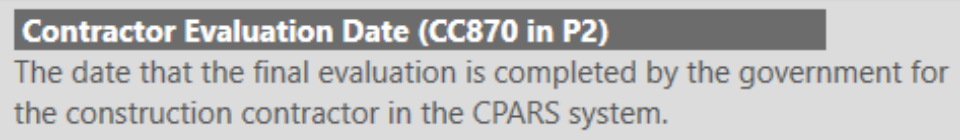
AE Evaluation Date (CC860 in P2)
The date that the final evaluation is completed by the government for the AE contractor in the CPARS system.

Beneficial Occupancy Date: The beneficial occupancy date (BOD) is the date that the customer can expect to receive useful occupancy of the facility or construction work. Although all construction efforts at the construction site may not be completed. For Civil Works, this milestone is equivalent to substantial completion, i.e., facility can be used for its intended purpose.

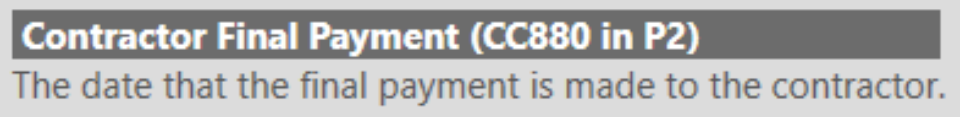
Beneficial Occupancy Date (CC850 in P2)
The beneficial occupancy date (BOD) is the date that the customer can expect to receive useful occupancy of the facility or construction work. Although all construction efforts at the construction site may not be completed. For Civil Works, this milestone is equivalent to substantial completion, i.e. facility can be used for its intended purpose.
Note: It is possible to have multiple BOD's on a single project. For projects with separate phases, the date in RMS should reflect the last or final BOD for the contract. Local milestones may be added to track multiple BOD's in RMS. LD's MAY stop upon BOD issuance.

Note: It is possible to have multiple BOD's on a single project. For projects with separate phases, the date in RMS should reflect the last or final BOD for the contract. Local milestones may be added to track multiple BOD's in RMS. Liquidated Damage'S (LD's) MAY stop upon BOD issuance. However, these are now stored in Other Deductions or Retainage until the LD can be rectified. Where these are stored are determined by office/district policies.

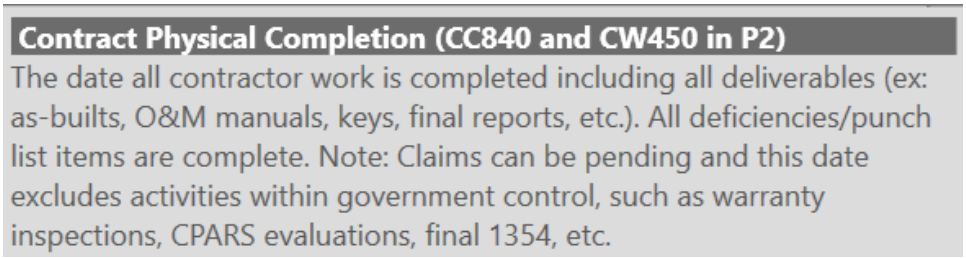
Contractor Evaluation Date: The date that the final evaluation is completed by the Government for the construction Contractor in the CPARS system.



Contractor Final Payment: If the *Contractor Final Payment* date has an actual date entry, it will indicate the end of the contract for Payroll purposes if no selection has been chosen in Contract Setup to end Contractor Payrolls. The automatic portion of the *Contractor Final Payment* is completed once a payment completed in the ***Progress Payment*** module that is marked as a final payment has been paid out by the USACE Financial Center through CEFMS.



Contract Physical Completion: This milestone is another one of the options that can be used to control the ending of payroll generation within the contract. Using this milestone as the selection in Contract Setup as the end of the contract for Payroll purposes, once an actual date is entered, then payrolls will stop. The Actual last day will also be dependent upon the days before or after this milestone were added in Contract Setup.



Note: No future payrolls will be generated, once this Actual Date has been entered if this milestone was chosen to end payrolls.

Project Fiscal Completion: Date all project fiscal requirements are satisfied, and all remaining design and construction funding returned to customer and CEFMS Construction-In-Progress (CIP) asset account is closed by Resource Management. The scheduled date comes from P2. The Actual date can be set to either come from P2 or to be entered manually. Once this Actual Date is entered, all data flow from P2 to RMS stops.

Note: Data pulled from Engineering and Construction Bulletin Issued 23 July 2012, No. 2012-21: ECB 2012-21 Construction Contract Duration and Beneficial Occupancy Date -- Applicability: Clarification and Guidance (wbdg.org)

Project Fiscal Completion (ML260 in P2)
Date all project fiscal requirements are satisfied, and all remaining design and construction funding returned to stakeholder. Scheduled and Actual date comes from P2.

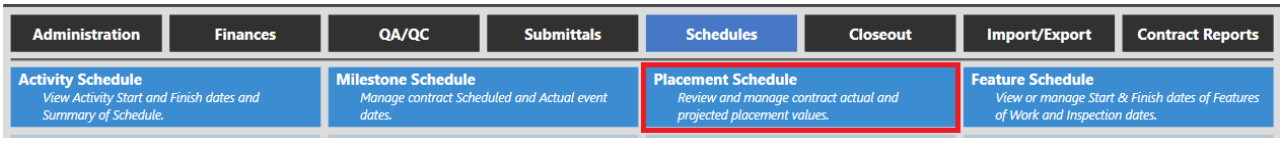
Note: Once the interface has a Fiscal Completion Actual date, removing the date will not re-enable the interface between P2 and RMS.

Transfer Document Date: Date that the stakeholder signs, acknowledging the document that transfers the completed work from USACE to the stakeholder.

Transfer Document Date (CC890 in P2)
Date that the stakeholder signs acknowledging the document that transfers the completed work from USACE to the stakeholder.
Note: For MILCON projects this is typically the DD1354.

Note: For MILCON projects this is typically the DD1354.

9.3 Placement Schedule

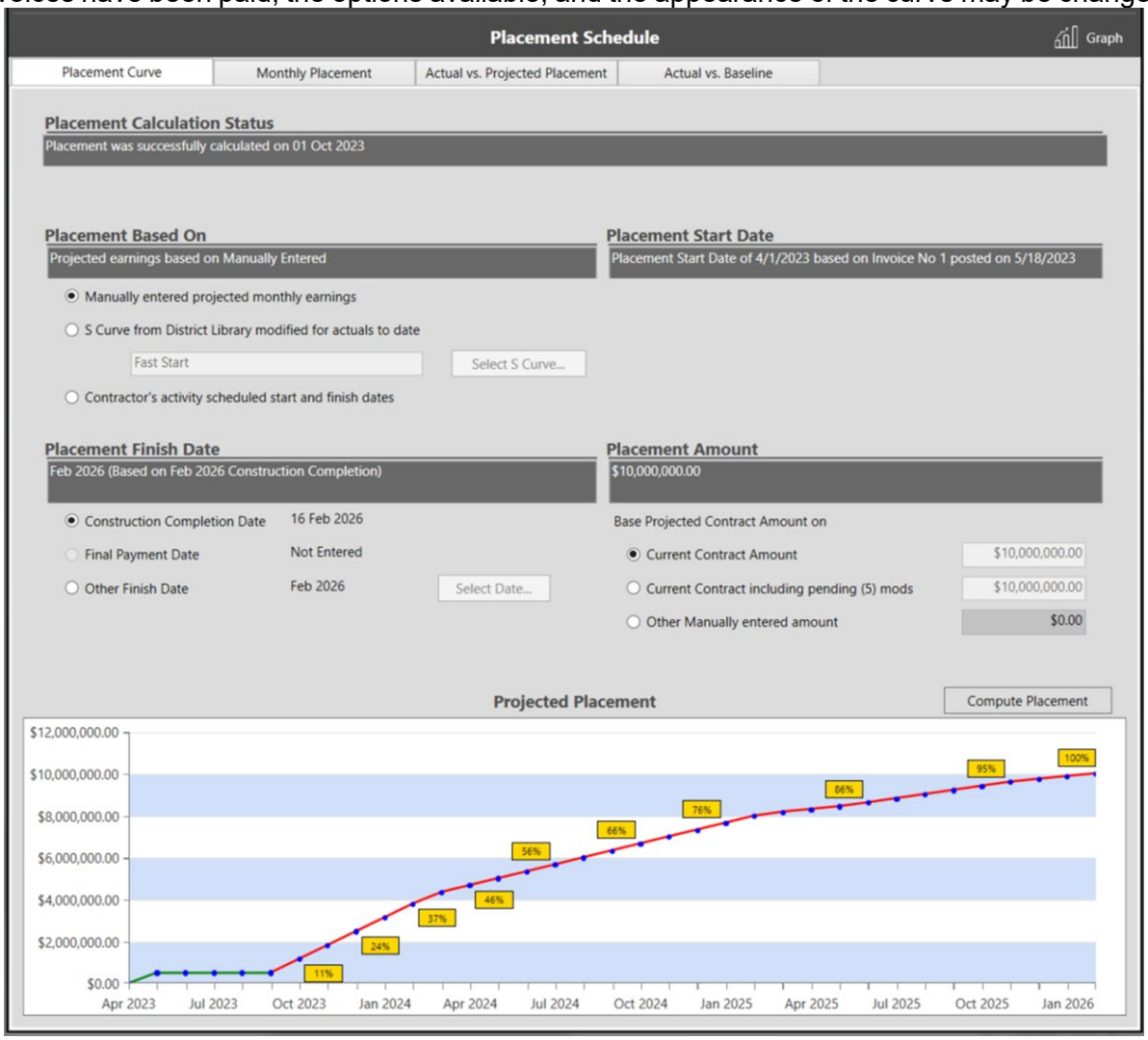


The ***Placement Schedule*** module tracks the dollar value completed over time, for budget purposes and to ensure proper fiscal management of the contract. It can be viewed in this module.

Both Progress and Placement are tracked in RMS. The Progress Schedule is concerned with the time that it takes to complete a contract. The Placement Schedule tracks the dollar value completed over time, for budget purposes and to ensure proper fiscal management of the contract.

9.3.1 Placement Curve

The ***Placement Curve*** tab displays a graph of projected earnings based upon selected parameters and available data. Based upon the status of the contract and whether any actual invoices have been paid, the options available, and the appearance of the curve may be changed.



There are three methods available for placement: *Manually entered projected monthly earnings*; *S Curve from District Library for actuals to date*; or using the *Contractor's activity scheduled start or finish dates*. Each of these will present users with different options and results depending upon whether the contract has begun or not. For instance, *Manually entered projected monthly earnings* can only be entered for dates in the future. So, keep in mind that if there are **actual** earnings on the contract, those will be used to date. The **projected** earnings will be used thereafter. There are numerous scenarios on how to choose to reflect and report the earnings:

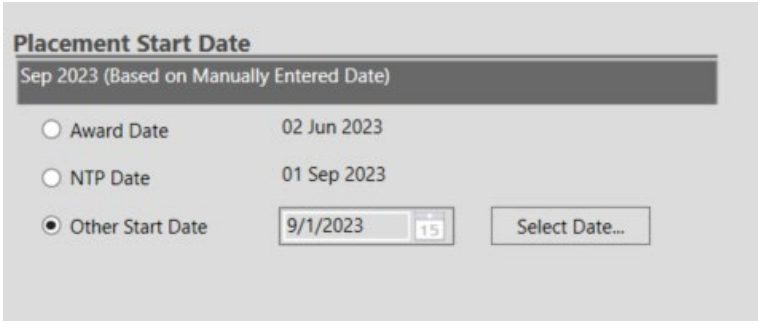
- Manually entered percentages
- Scheduled monthly progress
- Contractors' early start activity schedule
- Contractors' late start activity schedule
- Contractors' mid-float activity schedule

A placement based upon Contractors' schedule early, late, or mid-float dates will depend upon the activities entered by the Contractor, either by an imported SDEF file or activity dates entered by the Contractor manually.

In the ***District Library*** menu, under the ***Construction S Curve*** module, District Administrators can set additional curve templates to match a contract's estimated progression. RMS includes two commonly used placement curves but also allows additional curves to be made. Each month can have a custom percentage entered based on the desired template setup. Specific templates would be used to match a specific contract's estimated progression over the year.

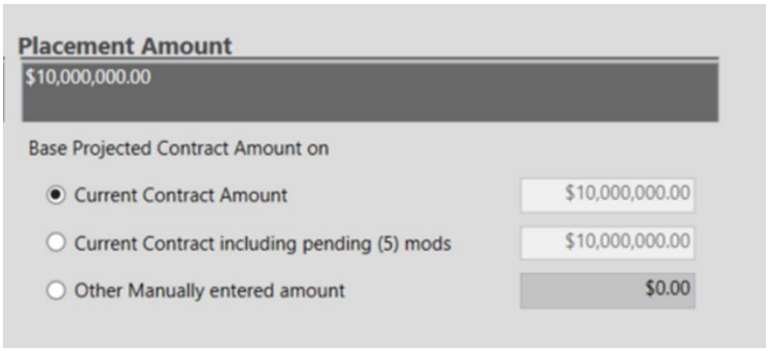
The *Placement Start Date* section will be editable when there has been no payment activity on the contract.

The *Award* or *NTP Date* can be used as the Placement Start Date, and if needed, a date can be manually entered by selecting *Other Start Date* and selecting the desired date using the *Select Date…* button.



Select a finish date from the *Placement Finish Date* section. The contract's *Construction Completion* or *Final Payment Date* can be used, or a date can be entered manually by selecting *Other Finish Date* and selecting a date using the *Select Date…* button.

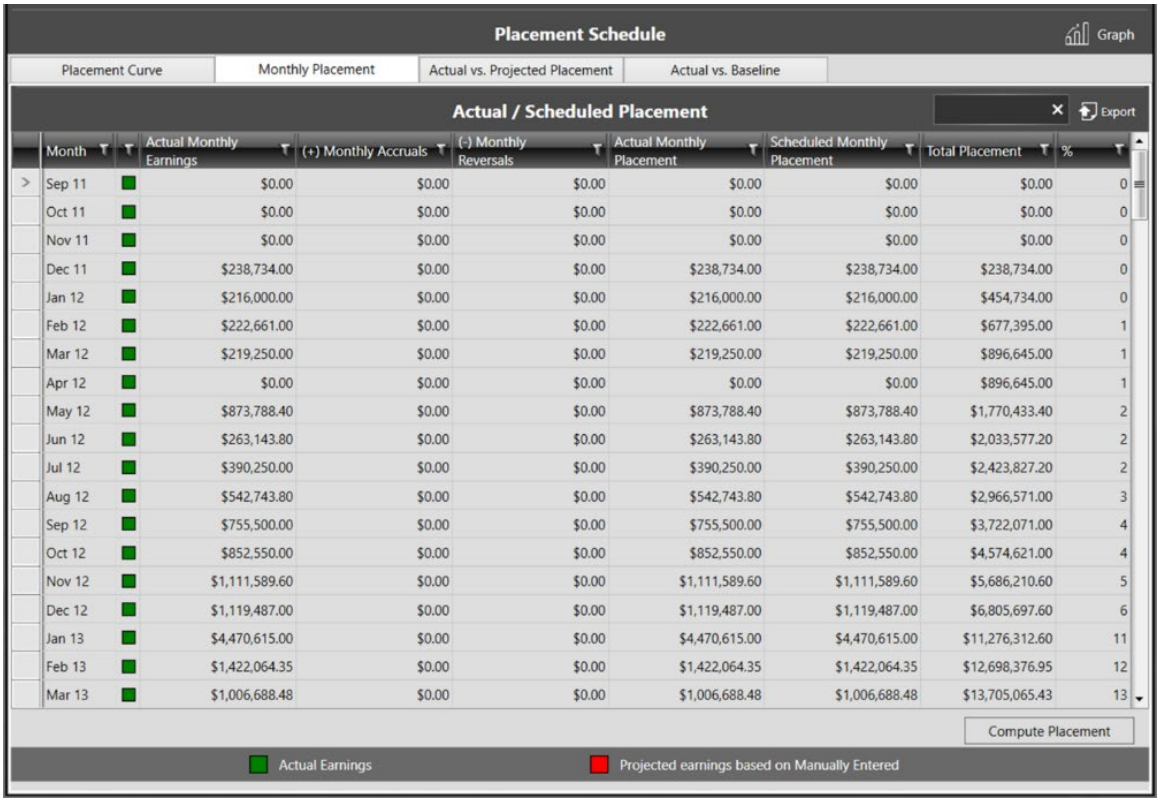
The *Placement Amount* section is used to determine the dollar amount on which to base the Projected Contract Amount. The *Current Contract Amount* or the *Current Contract Amount including pending (5) mods* can be used. Alternatively, an amount can be manually entered by selecting *Other Manually entered amount*, then entering the amount in the text box provided.



Once all the options have been set properly, click on the *Compute Placement* button to update the *Placement Curve*, *Monthly Placement* and *Actual vs. Projected Placement* tabs.

9.3.2 Monthly Placement

The grid shown on this tab reflects both prior payments and projected payments based upon the status of the contract and whether any prior payments have been made.

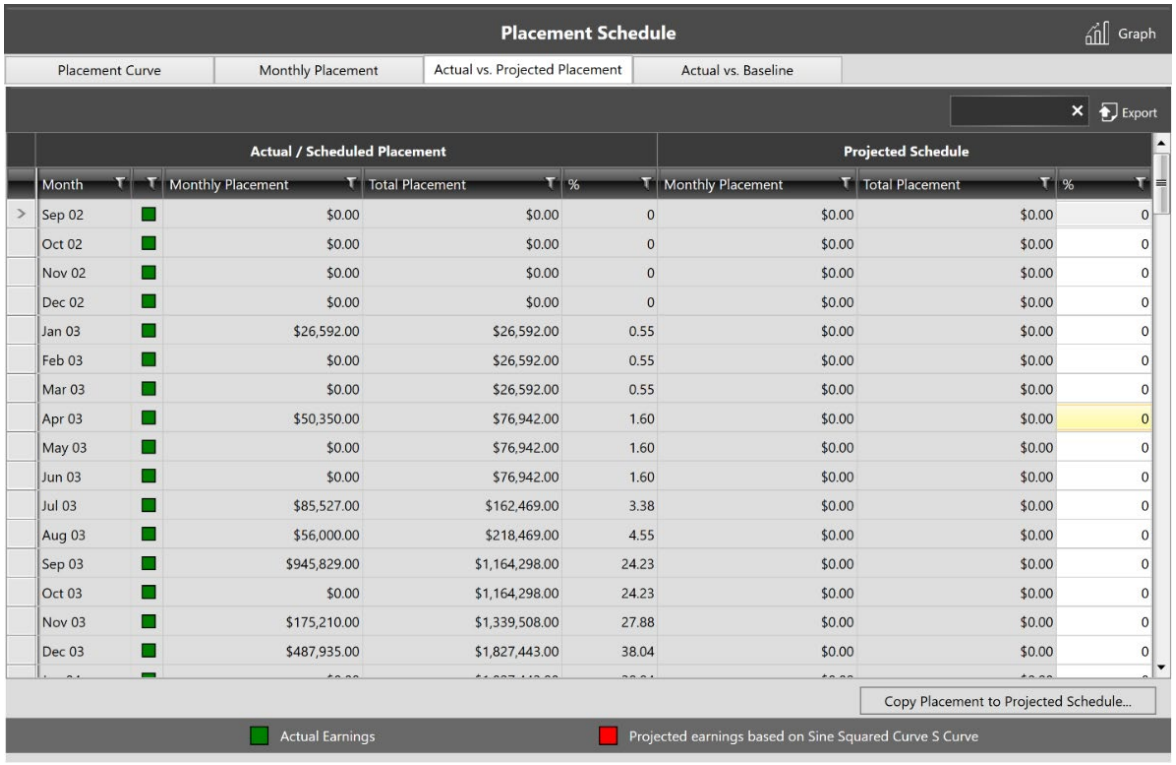


Month	Actual Monthly Earnings	(+) Monthly Accruals	(-) Monthly Reversals	Actual Monthly Placement	Scheduled Monthly Placement	Total Placement	%
Sep 11	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
Oct 11	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
Nov 11	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0
Dec 11	$238,734.00	$0.00	$0.00	$238,734.00	$238,734.00	$238,734.00	0
Jan 12	$216,000.00	$0.00	$0.00	$216,000.00	$216,000.00	$454,734.00	0
Feb 12	$222,661.00	$0.00	$0.00	$222,661.00	$222,661.00	$677,395.00	1
Mar 12	$219,250.00	$0.00	$0.00	$219,250.00	$219,250.00	$896,645.00	1
Apr 12	$0.00	$0.00	$0.00	$0.00	$0.00	$896,645.00	1
May 12	$873,788.40	$0.00	$0.00	$873,788.40	$873,788.40	$1,770,433.40	2
Jun 12	$263,143.80	$0.00	$0.00	$263,143.80	$263,143.80	$2,033,577.20	2
Jul 12	$390,250.00	$0.00	$0.00	$390,250.00	$390,250.00	$2,423,827.20	2
Aug 12	$542,743.80	$0.00	$0.00	$542,743.80	$542,743.80	$2,966,571.00	3
Sep 12	$755,500.00	$0.00	$0.00	$755,500.00	$755,500.00	$3,722,071.00	4
Oct 12	$852,550.00	$0.00	$0.00	$852,550.00	$852,550.00	$4,574,621.00	4
Nov 12	$1,111,589.60	$0.00	$0.00	$1,111,589.60	$1,111,589.60	$5,686,210.60	5
Dec 12	$1,119,487.00	$0.00	$0.00	$1,119,487.00	$1,119,487.00	$6,805,697.60	6
Jan 13	$4,470,615.00	$0.00	$0.00	$4,470,615.00	$4,470,615.00	$11,276,312.60	11
Feb 13	$1,422,064.35	$0.00	$0.00	$1,422,064.35	$1,422,064.35	$12,698,376.95	12
Mar 13	$1,006,688.48	$0.00	$0.00	$1,006,688.48	$1,006,688.48	$13,705,065.43	13

If the user has selected to manually enter projected earnings, this grid will allow these projected earnings to be entered for future months. Manually entered percentages will adjust the earnings curve on rows for future months. Simply enter the percentages in the fields as required. If users click on the *Compute Placement* button, all data will be recomputed and entered based on the information entered on the ***Placement Curve*** tab, completed progress payments, and any modifications that have been applied to the contract.

9.3.3 Actual vs. Projected Placement

This tab compares actual progress with the projected and allow the user to make adjustments.



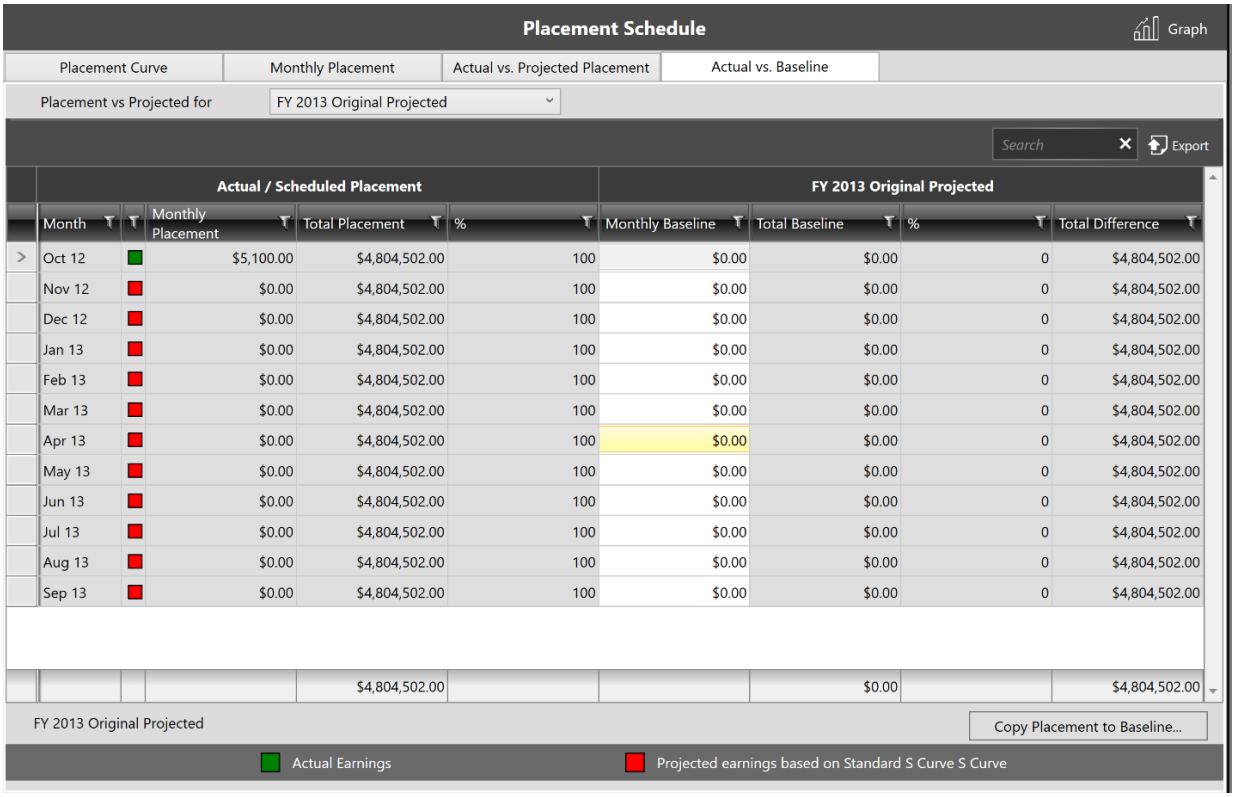
There is a button at the bottom to allow the user to *Copy Placement to Projected Schedule*.

When clicking on the *Copy Placement to Projected Schedule* button, the values in the Placement columns on the left of the above view are copied into the Projected Schedule on the right portion of the view.

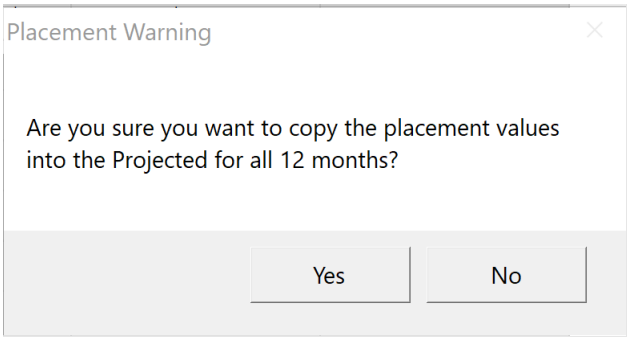
Remember that placement is planned budget until payments are made but a projected schedule is a copy of prior placement planning.

9.3.4 Actual vs. Baseline

Under some circumstances, a fourth tab will appear on the ***Placement Schedule***.



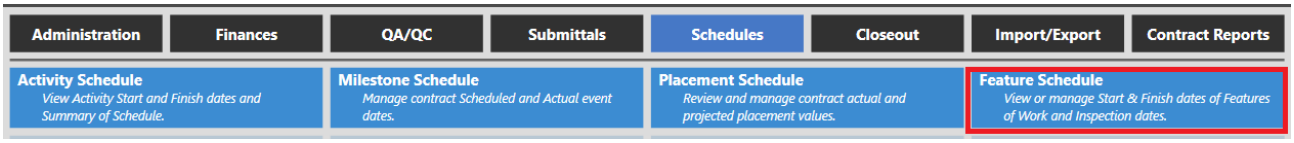
On this tab, the user may click *Copy Placement to Baseline*.



Same thing for the *Copy Placement to Baseline*, the placement is copied to the baseline columns.

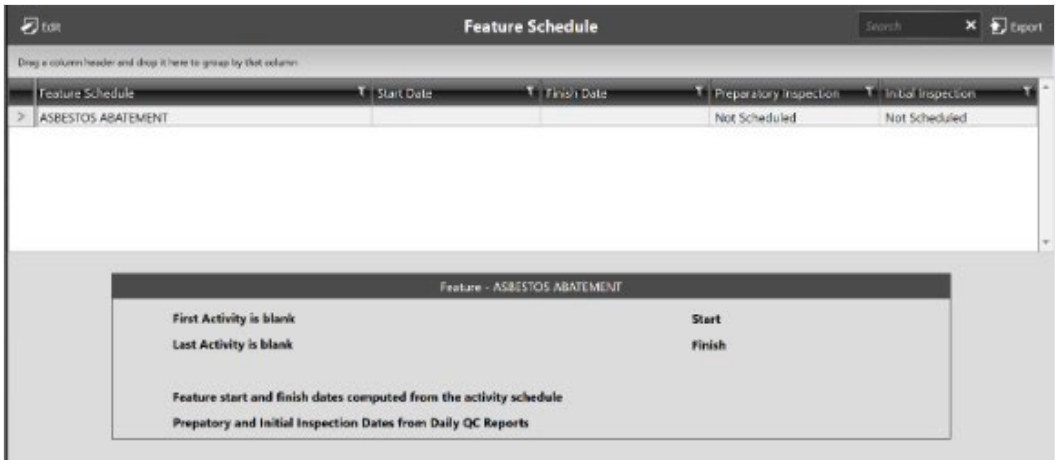
In the District Office, FY Baseline Placement, district administrators can set a baseline of yearly spending and apply to specific contracts. District administrators can set all contracts to be updated with placement for the FY or lock baseline schedules. A contract Baseline due date can also be set by the district administrators in the ***FY Baseline Placement*** module under ***District Office***.

9.4 Feature Schedule

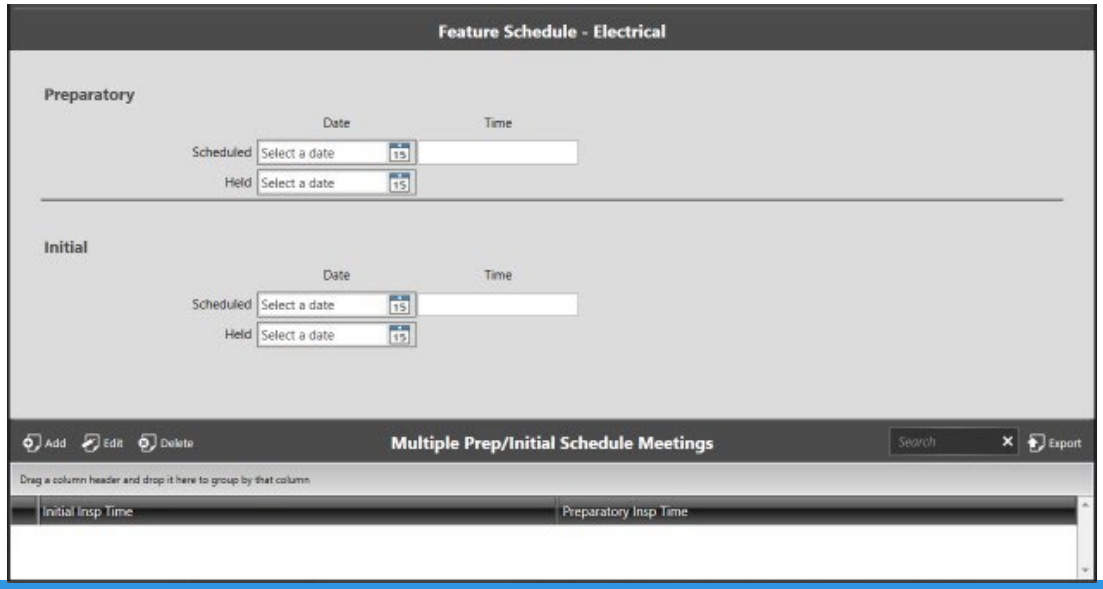


As part of the Contractor's QC Plan, Definable Features of Work for a construction contract are identified by the Contractor to plan Preparatory, Initial and Follow-Up inspections of the work.

RMS generates a *Feature Schedule* by finding the first activity scheduled to start under a feature and the last activity scheduled to be finished under a feature. Actual progress is determined by computing earnings to date on the activities for a feature. Most construction contracts (even those with 1000's to tens of 1000's of work activities) have fewer than 30 features of work. This rolled up feature schedule makes an excellent schedule for easily monitoring the progress on a contract. The customers find this schedule very easy to understand. Typical features include items like Site Utilities, Interior Electrical, Roofing, etc.

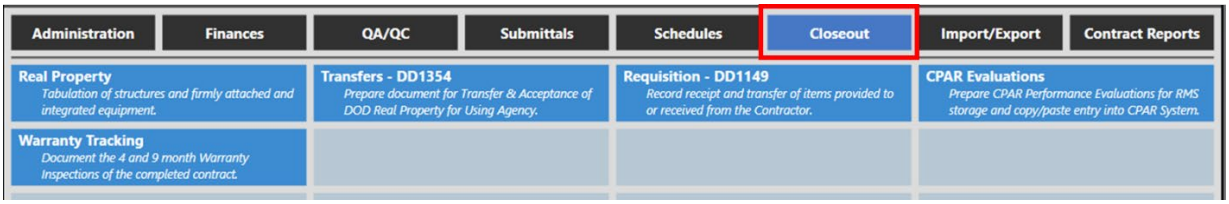


All Contractor activities must be assigned to one and only one definable Feature of Work. Each definable Feature of Work may have many activities linked to it. To edit a Feature, select one and click the *Edit* button.



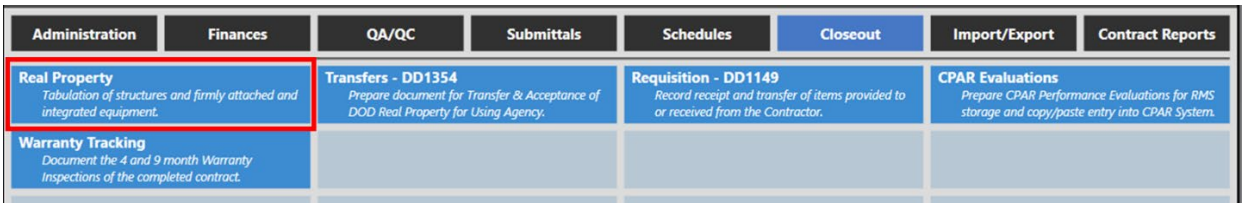
The *Preparatory* and *Initial Inspection Dates* and *Times* can be updated here. If multiple meetings were held, Multiple Prep/Initial Schedule Meetings section will display the meeting history. These definable Features of Work in the Quality Control Plan must match those in the scheduling program.

10.0 CLOSEOUT



Construction is complete, but contract procedures are not complete. The ***Closeout*** tab provides instructions for documenting real property and transfers as needed based on the requirements from DD1354 requirements. Additionally, this section gives instructions on fulfilling the requisition procedures to include CPAR evaluations and warranty tracking.

10.1 Real Property



For Military construction contracts, Real Property is required to be documented by use of the Transfer and Acceptance of Military Real Property DD Form 1354. This form is used to transfer a facility, or part of a facility, to the Using Service prior to either partial or complete occupancy. This form may be supplemented by Real Property Record DA Form 2877 on Army construction contracts. The initial DD Form 1354 is required to be provided by the design A-E. The Resident/ Project Engineer Staff supplements the information provided on the initial DD Form 1354 and accompanying forms and completes the form.

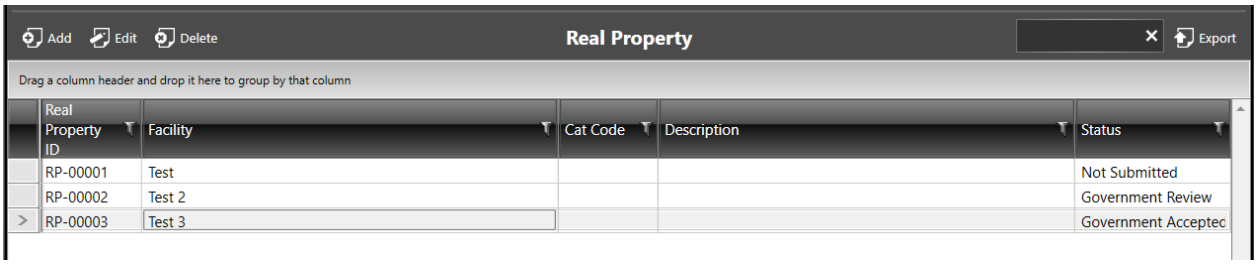
This should be a simplified process if material is gathered as the construction progresses. The completed DD Form 1354, with the real property records, is submitted by the Resident/Project Engineer to the Using Service. Regulations require the Using Service to accept the transfer of construction by signing the form. The deficiencies found during the final inspection that were not immediately corrected are listed on the back of the form. The deficiencies relate to contract requirements only. Design deficiencies are not to be included. If there are any disputes as to items being construction deficiencies, these should be resolved by the ACO/CO, if possible. If not, the dispute is forwarded, in writing, to the District with an explanation of the facts. All renovation and alteration projects require a DD Form 1354, as well as all maintenance and repair projects. Prior to the final inspection, the Resident/Project Engineer determines the approximate cost of the contract, exclusive of possible claims.

Computation of this cost should be available, if desired, at the final inspection. On unit price contracts it may be necessary to submit an interim DD Form 1354. A final DD Form 1354 will be submitted once all invoices are received from the Contractor and validation of final quantities is complete. This final form is the designated responsibility of PPMD within the District. Real Property is transferred to the Customer upon completion (or partial completion, as the case may be). Real Property consists of land and capital improvements to land. Real Property is considered

anything attached to the land, such as a building, parking lot, and underground piping systems or a fence. It also includes items on the interior of a building, such as fire protection systems, plumbing systems, and electrical systems. A formidable challenge exists to keep track and document Real Property Assets. Using RMS will greatly simplify this task.

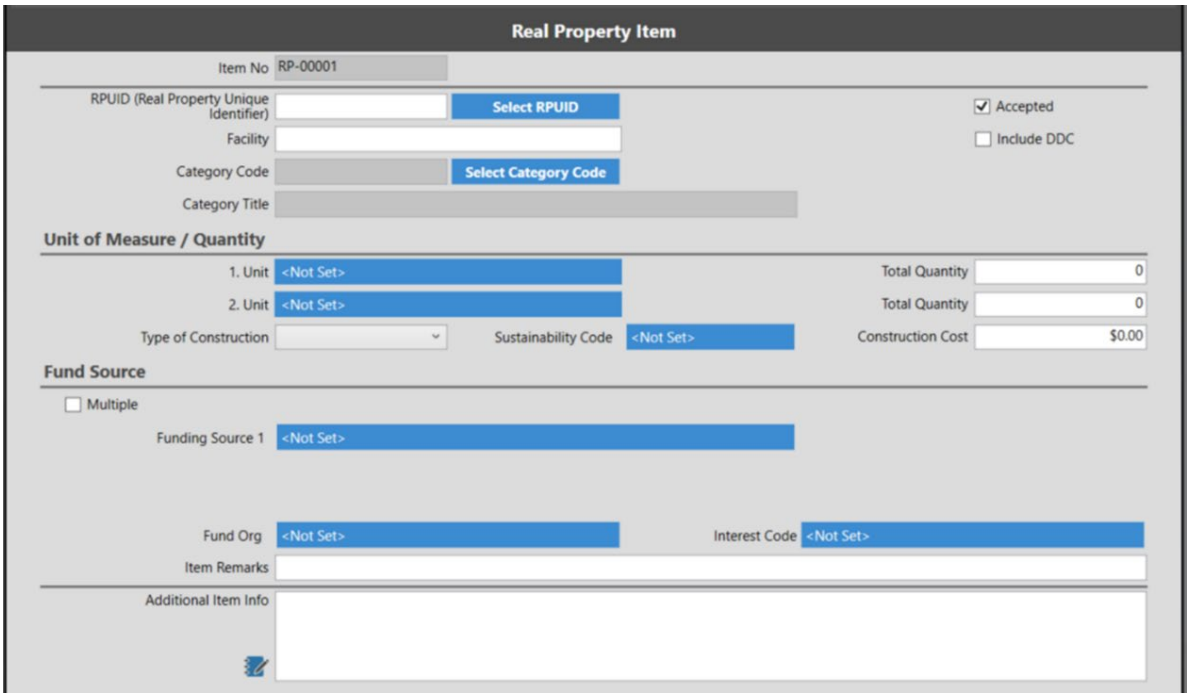
Both Government and Contractor users have the capability to add Real Property items.

To view, add and edit real property items, click on the ***Closeout*** tab then click on the blue ***Real Property*** module. This will open the real property selection view where a data grid of all real property items within the contract is displayed. The status of the item will be either *Not Submitted*, *Government Accepted*, or *Government Review*. Items that have not been submitted by the Contractor will show in this list with the status *Not Submitted*.



When adding or editing a Real Property item, the following screen will display.

Note: When real property items are added in Government Mode, the *Accepted* checkbox will be automatically checked and show in the data grid above as *Government Accepted*. Unchecking this checkbox will change the item's status to *Not Submitted* which will allow the Contractor to edit the item.



Note: When the Contractor has entered the Real Property item for Government review, the *Accepted* checkbox will be unchecked, and the Government will fill in the remaining information required for the item. If needed, the information entered by the Contractor can be edited by either the Contractor or the Government, as well. If all information is deemed

correct, the *Accepted* checkbox may be checked. This action will prevent the Contractor from editing the item further.

Item Number: The item number is a field used to identify the real property item, this number is automatically generated by the RMS software and generates this number in sequential order (e.g., if a new real property were to be created after RP-00003 the next would RP-00004).

RPIUD (Real Property Unique Identifier): Enter the Real Property Asset's unique identifier here. A Real Property Asset is a land parcel, building, structure, or linear structure located on a site and a unique identifier is assigned to each individual land parcel or facility (i.e., a building, structure, or linear structure). A real property site is comprised of one or more Real Property Assets and is also assigned a unique identifier. Either assets or sites may be entered into RMS. The ID is 18-characters long and is generated by, and maintained in, the Registry. An ID is never duplicated or reused and remains archived in the Registry database even after the asset is retired or disposed, so that the ID and associated organizational information will be available for audit and reporting purposes.

Facility: The facility or building that is attached to the real property item.

Include DDC: Design During Construction (DDC). Check this box to indicate if this item needs to be including in Design During Construction costs calculation in the final DD1354.

Category Code and Category Title: Select a Category code by clicking on the blue *Select Category Code* tile. This will open a lookup where users can link the real property item with the category code, this will populate the two fields category code and category title.

Unit of Measure / Quantity: The unit of measure is used to define the measurement used with in the real property asset and the quantity can be set using the *Total Quantity* text box(es) to the right of the unit.

Type of Construction: Enter the type of construction here. FY22 lookups can be enabled in the ***Contract Setup*** module under the ***Administration*** tab. Check the *Enable FY22 look ups for DD 1354* checkbox. New contracts will default to this lookup.

Sustainability Code: Select the appropriate Sustainability Code for the real property item.

Construction Cost: Cost of the construction.

Fund Source: Fund Source refers to the source of funds that are used to pay for this Real Property Asset. If multiple funding sources are being utilized, check the *Multiple* checkbox, and RMS will display additional fields, which allow entry of up to three funding sources and percent utilization of each funding source.

Fund Org: Fund Org (Organization) refers to the Organization that is funding the real property assets. To set the Fund Org, click on the blue tile and select the appropriate organization code which corresponds to the organization that is funding the real property item.

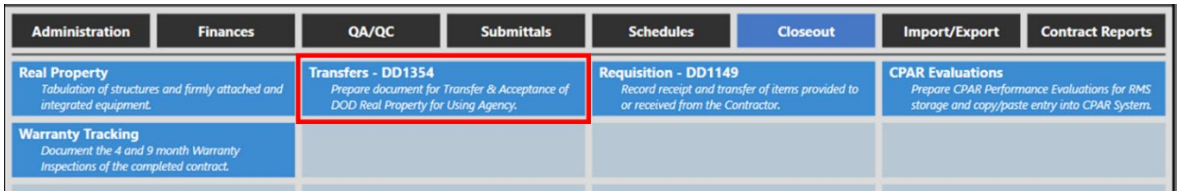
Interest Code: The interest code refers to the interest agreement placed upon the real property item, users can select an interest code by clicking on the blue tile next to the interest code and selecting the appropriate interest code.

Item Remarks: Provide any remarks to be included in the real property item.

Additional Item Info: Enter additional information for the real property item here.

Upon completion of the item, ensure that the *Accepted* checkbox is checked and click the *Back* button at the top to save.

10.2 Transfers – DD1354

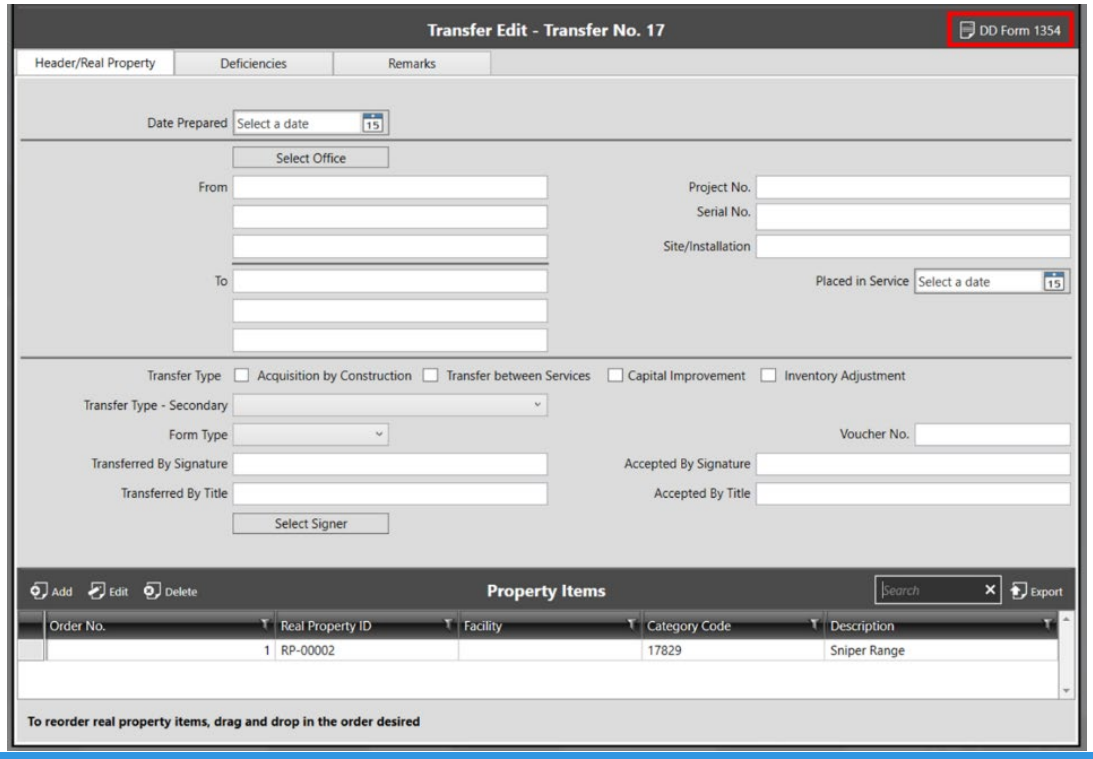


Documents can be prepared for transfer and acceptance of the DoD real property for the using agency by creating DD Form 1354 for transfers. This form can be created using the ***Transfers – DD1354*** module. This will open the transfer selection view where DD1354 transfers can be added, edited, and/or deleted.

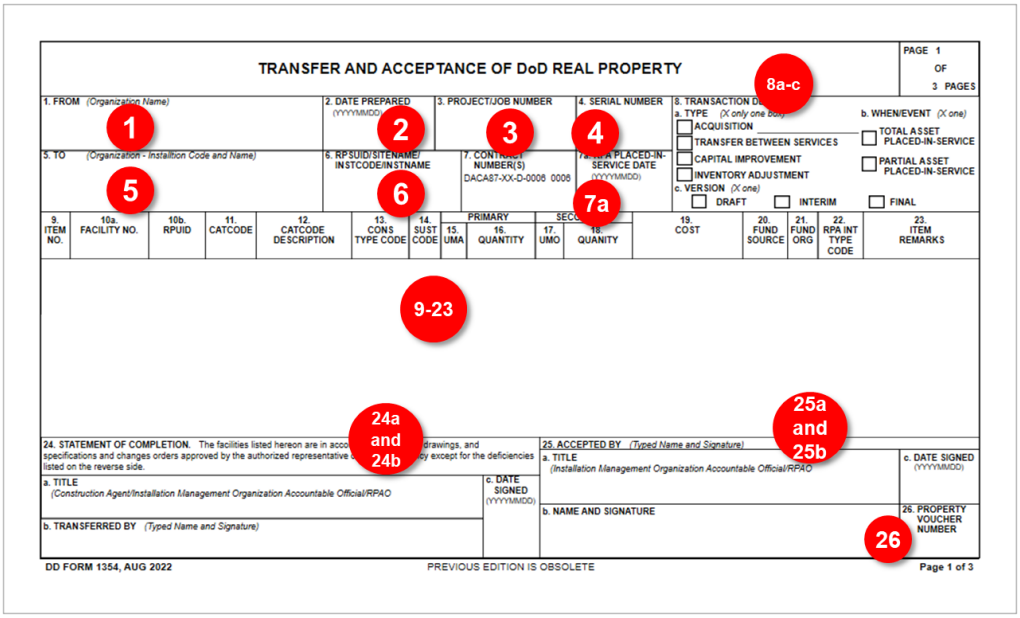
After adding or editing the transfer edit view will be presented. Users can edit and add information regarding, the transfer and acceptance of the real property items. The DD Form 1354 is composed of the information found in the transfer edit view within the three tabs ***Header/Real Property***, ***Deficiencies***, and ***Remarks***.

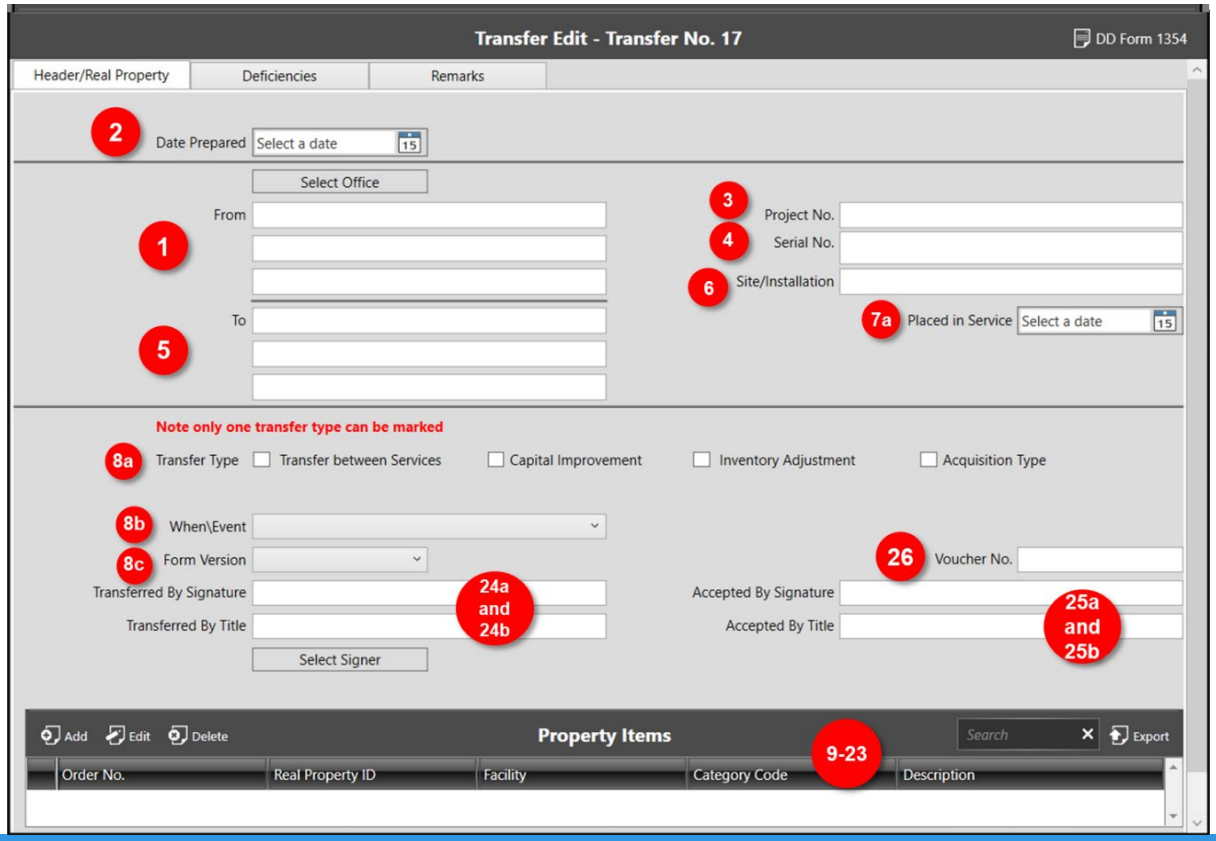
To edit, single click the item to edit and then click the *Edit* button or double click on the item that needs to be edited. All areas that are not greyed out can be edited in the edit view that displays. Click the *Back* button to save the information. To delete, single click on the item to delete and click on the *Delete* button, then confirm deletion.

The DD Form 1354 can be viewed at any time by clicking the button in the top-right corner as depicted below. Information will populate in the form as it is entered.



The ***Header/Real Property*** tab will fill in the first page of the DD Form 1354. The figures below portray how the form maps to the edit view. The property items are added in the Property Items section at the bottom of the screen. Property Items will populate sections 9-23 of the DD Form 1354. The items may be rearranged in the Property Items by dragging and dropping in the preferred order. The items will display in this order on DD Form 1354.

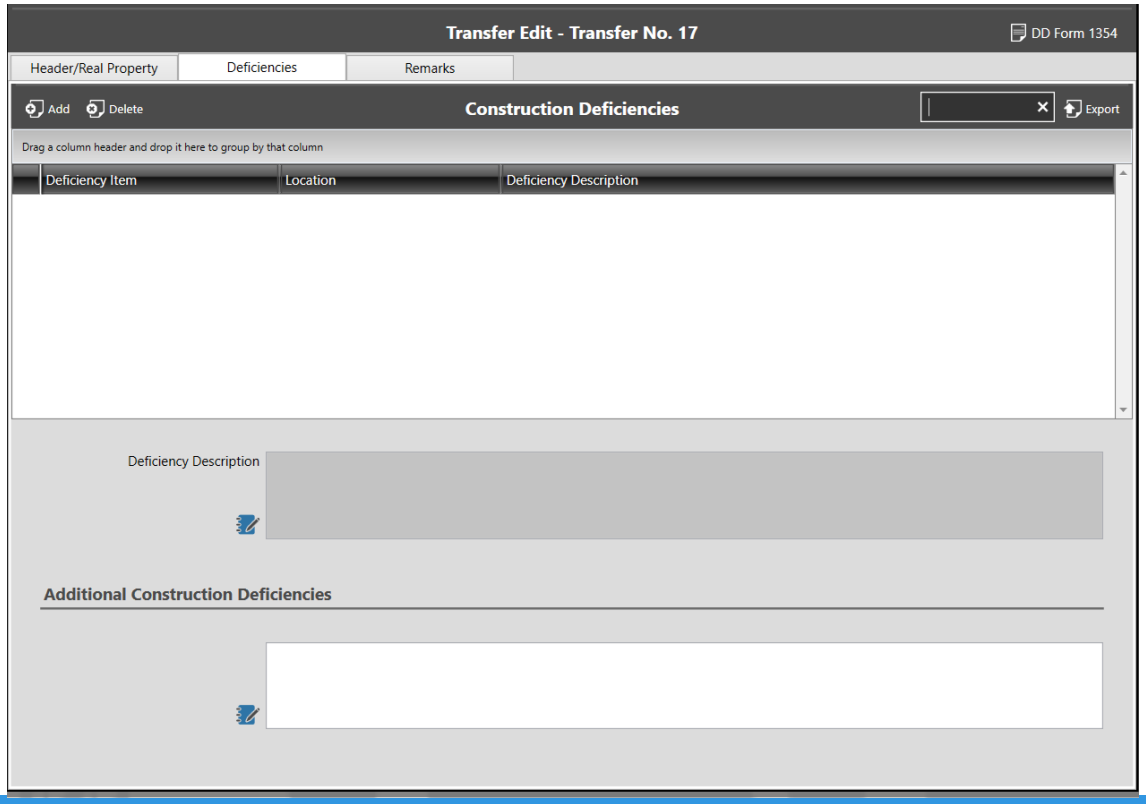




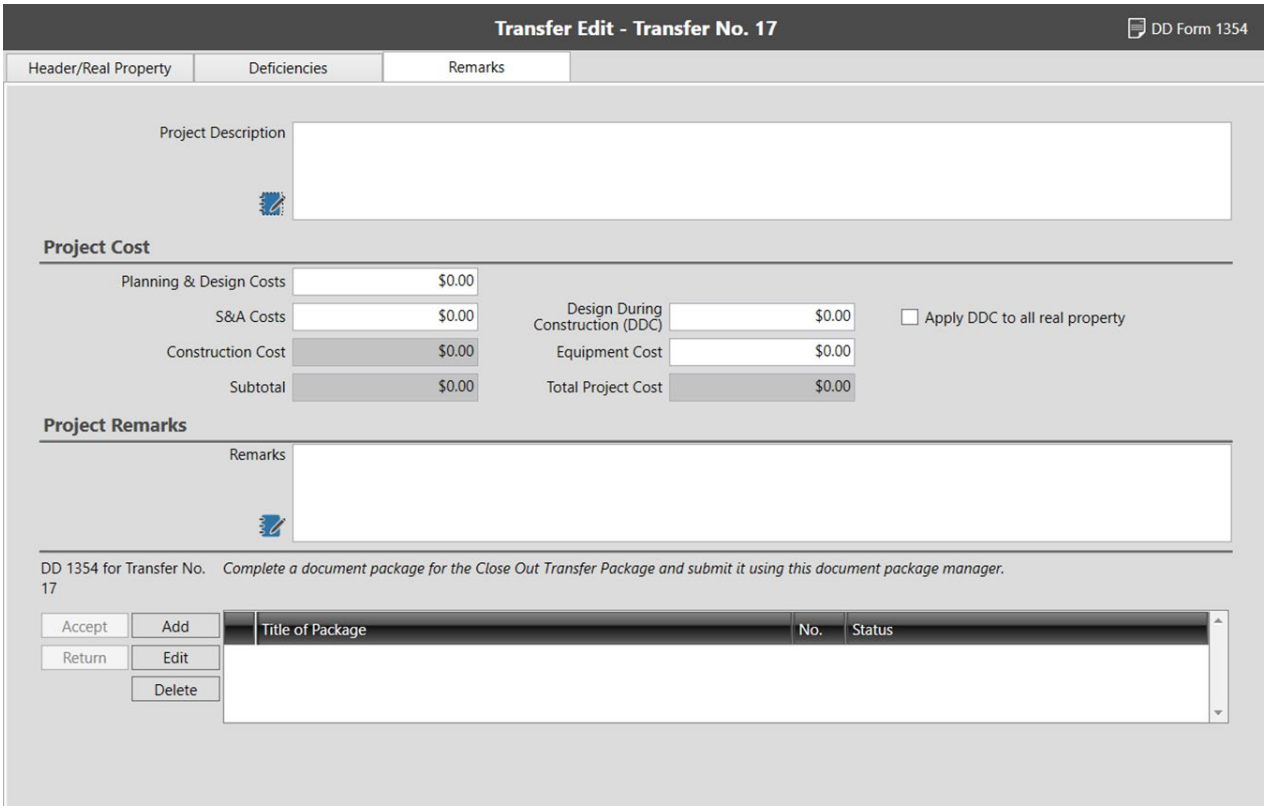
Number correlations between RMS and form DD 1354:

Transfer Edit View	DD Form 1354 Section
From	1
Date Prepared	2
Project No.	3
Serial No.	4
To	5
Site/Installation	6
Placed in Service	7a
Transfer Type	8a
When/Event	8b
Form Version	8c
Property Item	9-23
Transferred By Signature	24a
Transferred By Title	24b
Voucher No.	26
Accepted By Signature	25a
Accepted By Title	25b

The ***Deficiencies*** tab is used to add construction deficiencies on the transfer form. This will fill out section 27 of DD 1354. The deficiencies are added in order of the deficiency item number.

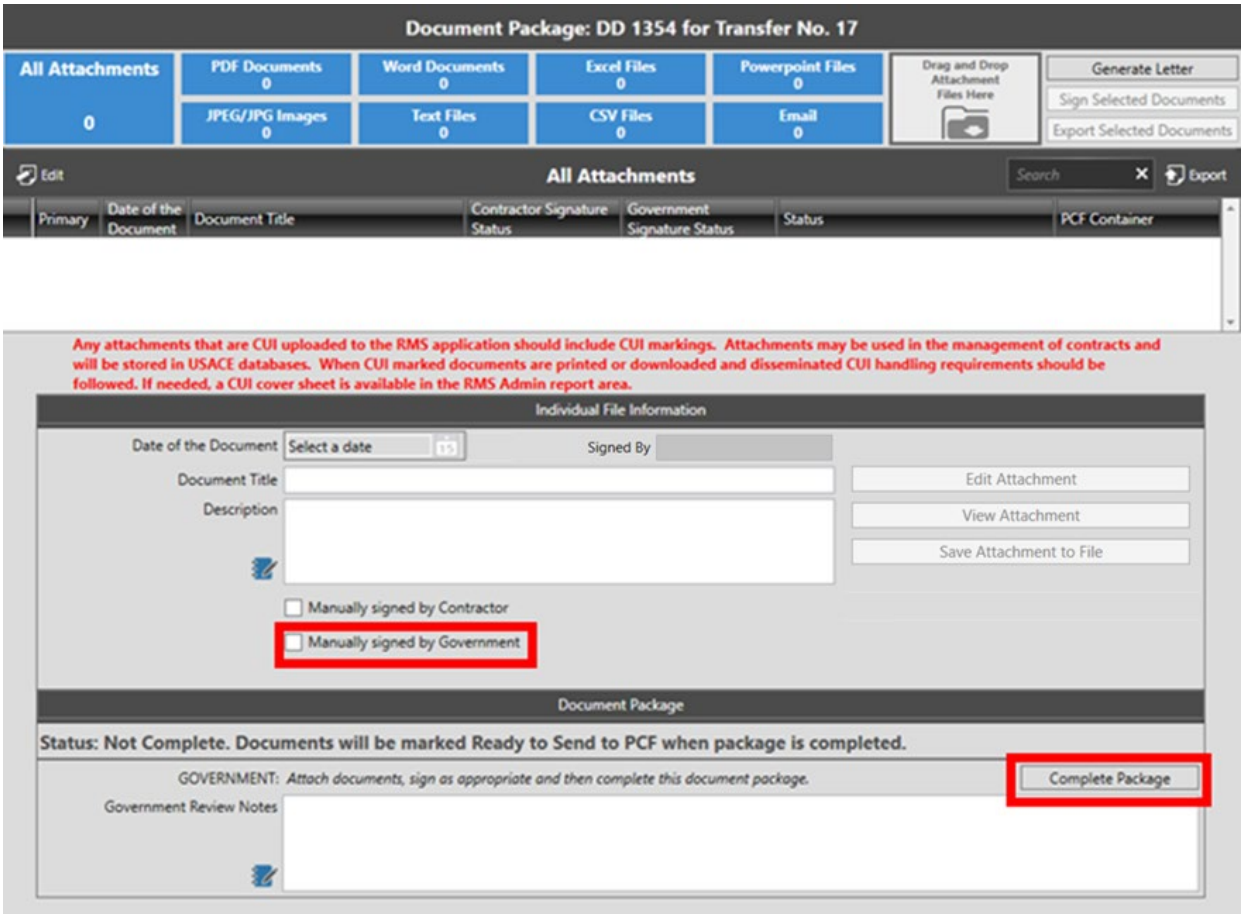


The ***Remarks*** tab will fill out section 28 of the transfer form. This section includes a description of the project along with project costs. The field subtotal is the sum of the Construction cost, planning & design cost, S&A costs, and Equipment costs. Entering values in Design During Construction section will propagate against all Property Items which have been marked with *Include DDC*.

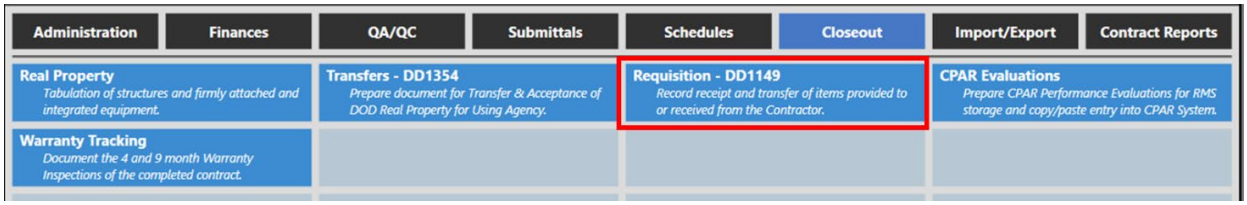


Once all data has been filled in appropriately, preview the form by clicking on the *DD Form 1354* button in the top right, ensure all information is displayed accurately, then download and save the form to a preferred file location. A physical signature is required on this form. After the form has been signed, add a Document Package in the Transfer Edit view under the ***Remarks*** tab.

Upload the signed form by clicking *Add* and choosing to select the file from the file system. Check the *Manually signed by Government* checkbox and click on the *Complete Package* button, then click *Yes*. Click on the *Back* button at the top of the screen to save the Document Package. Click on the *Back* button once more to save the DD Form 1354.



10.3 Requisition – DD1149

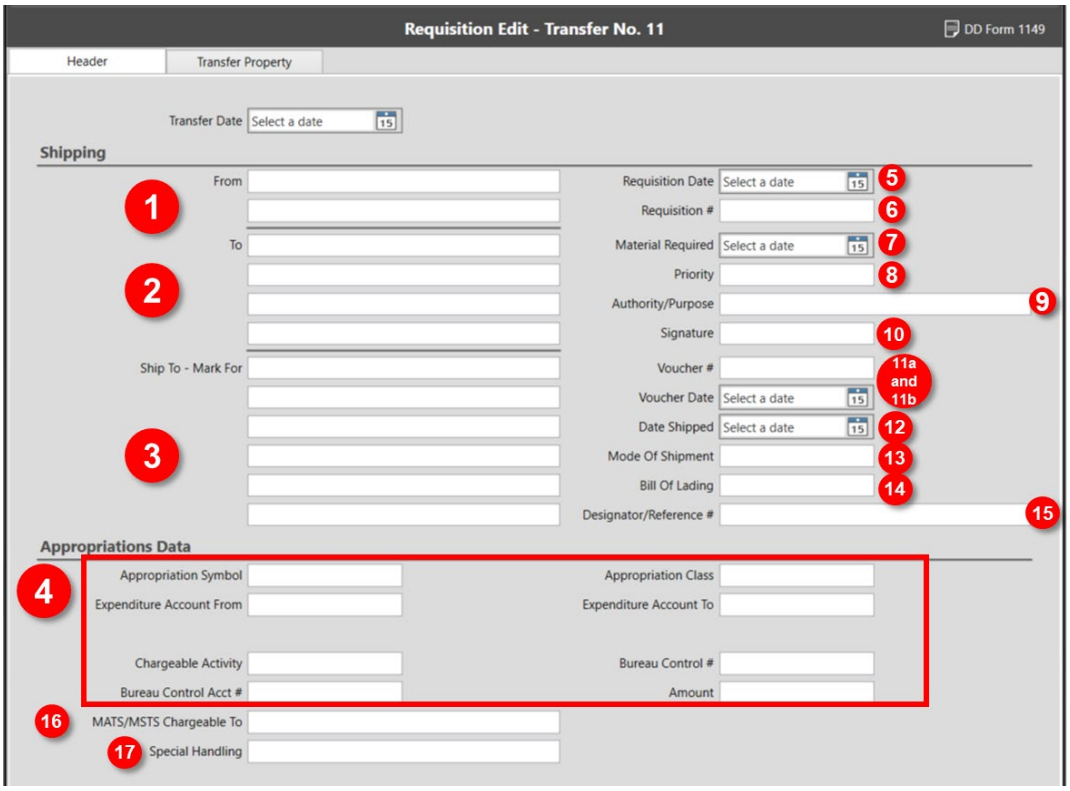


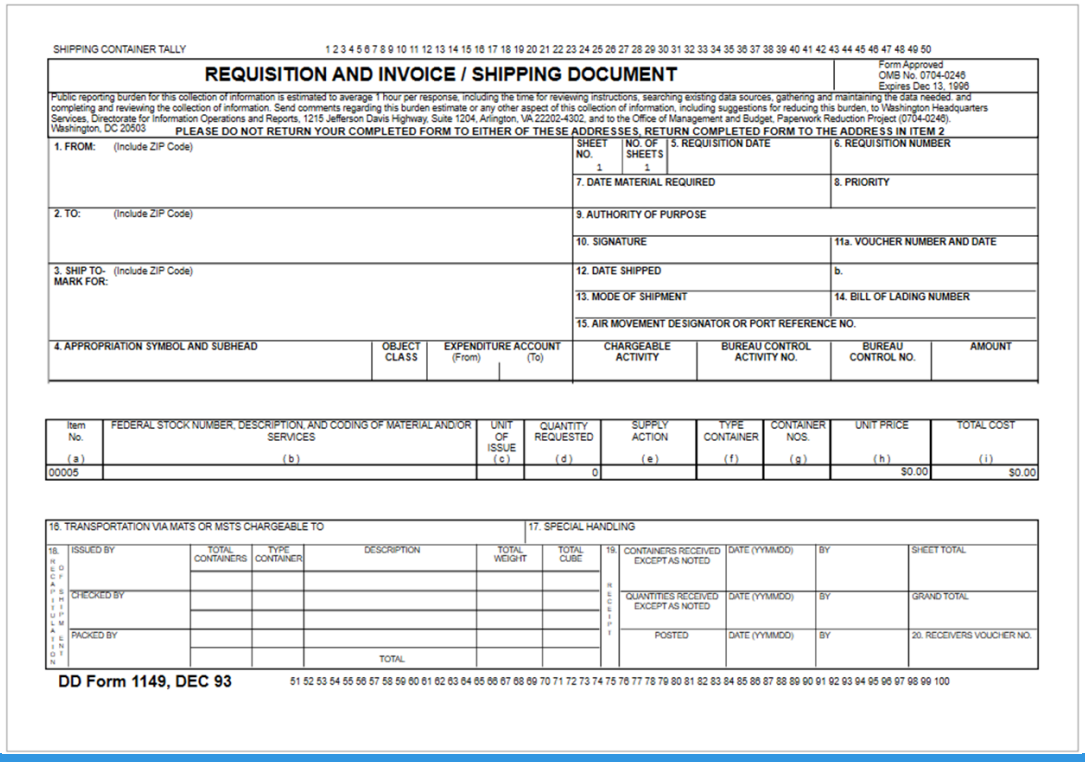
The DD1149 is a record receipt and transfer of items provided to or received from the Contractor. To create a DD1149 requisition form, navigate to the ***Requisition – DD1149*** module within the ***Closeout*** tab.

This module shows a data grid with a list of the requisitions made within the contract. To add requisition to the contract, click on the *Add* button. To edit a requisition, click on the *Edit* button. The edit view will be presented after each of these actions.

In the requisition edit view, there are two tabs: ***Header*** and ***Transfer Property***. The *DD Form 1149* button can be used to preview the report.

The ***Header*** tab fills out sections 1-17 on the requisition form. The following table demonstrates the mapping from this tab to the DD 1149 form.





SHIPPING CONTAINER TALLY

REQUISITION AND INVOICE / SHIPPING DOCUMENT

Form Approved OMB No. 0704-0246 Expires Dec 13, 1998

Public reporting burden for this collection of information is estimated to average 1 hour per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to Washington Headquarters Services, Directorate for Information Operations and Reports, 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302, and to the Office of Management and Budget, Paperwork Reduction Project (0704-0246), Washington, DC 20503

PLEASE DO NOT RETURN YOUR COMPLETED FORM TO EITHER OF THESE ADDRESSES. RETURN COMPLETED FORM TO THE ADDRESS IN ITEM 2

1. FROM: (Include ZIP Code)			SHEET NO. 1	NO. OF SHEETS 1	5. REQUISITION DATE	6. REQUISITION NUMBER	
			7. DATE MATERIAL REQUIRED			8. PRIORITY	
2. TO: (Include ZIP Code)			9. AUTHORITY OF PURPOSE				
			10. SIGNATURE			11a. VOUCHER NUMBER AND DATE	
3. SHIP TO- MARK FOR: (Include ZIP Code)			12. DATE SHIPPED			b.	
			13. MODE OF SHIPMENT			14. BILL OF LADING NUMBER	
			15. AIR MOVEMENT DESIGNATOR OR PORT REFERENCE NO.				
4. APPROPRIATION SYMBOL AND SUBHEAD	OBJECT CLASS	EXPENDITURE ACCOUNT (From)	(To)	CHARGEABLE ACTIVITY	BUREAU CONTROL ACTIVITY NO.	BUREAU CONTROL NO.	AMOUNT

Item No. (a)	FEDERAL STOCK NUMBER, DESCRIPTION, AND CODING OF MATERIAL AND/OR SERVICES (b)	UNIT OF ISSUE (c)	QUANTITY REQUESTED (d)	SUPPLY ACTION (e)	TYPE CONTAINER (f)	CONTAINER NOS. (g)	UNIT PRICE (h)	TOTAL COST (i)
00005			0				$0.00	$0.00

16. TRANSPORTATION VIA MATS OR MSTS CHARGEABLE TO

17. SPECIAL HANDLING

18. RECEIPT AND ISSUE	ISSUED BY	TOTAL CONTAINERS	TYPE CONTAINER	DESCRIPTION	TOTAL WEIGHT	TOTAL CUBE
	CHECKED BY					
	PACKED BY			TOTAL		

19. RECEIPT	CONTAINERS RECEIVED EXCEPT AS NOTED	DATE (YYMMDD)	BY	SHEET TOTAL
	QUANTITIES RECEIVED EXCEPT AS NOTED	DATE (YYMMDD)	BY	GRAND TOTAL
	POSTED	DATE (YYMMDD)	BY	20. RECEIVERS VOUCHER NO.

DD Form 1149, DEC 93

51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

Number correlations between RMS (pictured top) and form DD 1149 (pictured bottom):

Requisition Edit View	DD 1149 Form No.
From	1
To	2
Ship to – Mark For	3
Appropriations	4
Requisition Date	5
Requisition #	6
Material required	7
Priority	8
Authority/Purpose	9
Signature	10
Voucher #	11a
Voucher Date	11b
Date Shipped	12
Mode of shipment	13
Bill of Lading	14
Designator/Reference #	15
MATS/MSTS Chargeable to	16
Special Handling	17

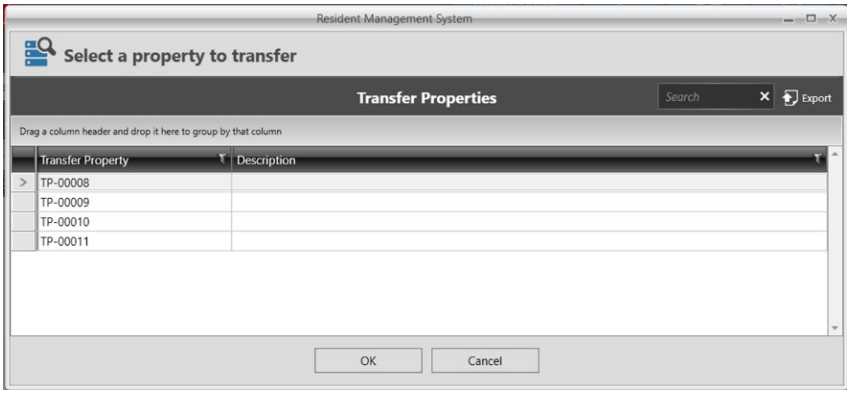
Transfer Property tab

Property Transfers can be added to the requisition on this tab by clicking the *Add* button.

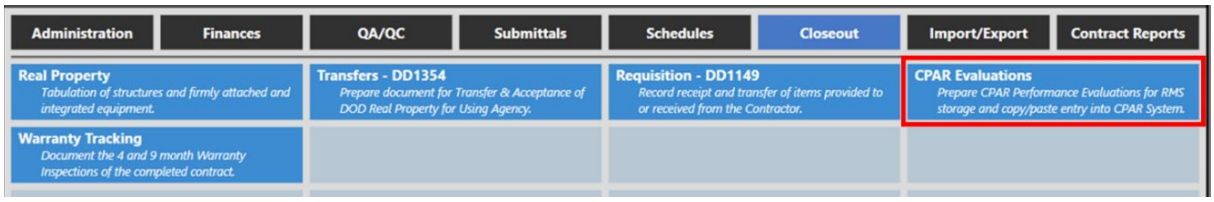
Only Property Transfers which have not been added on another requisition will appear in the list.

To edit a Property Transfer, click on the *Edit* button. To delete a Property Transfer, select one and click on the *Delete* button, then confirm the deletion.

Make the selection(s) and click *OK*.

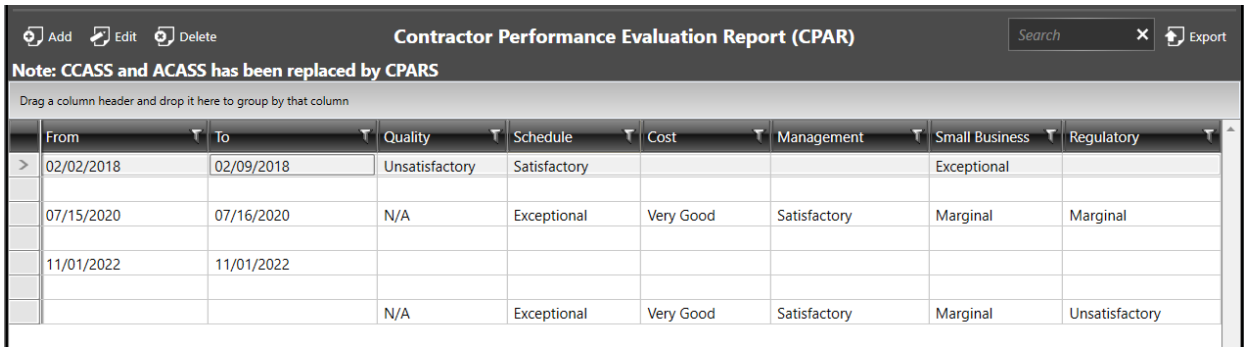


10.4 CPAR Evaluations



The Government can create Contractor Performance Assessment Report (CPAR) evaluations that contain various information regarding the Contractor along with performance ratings.

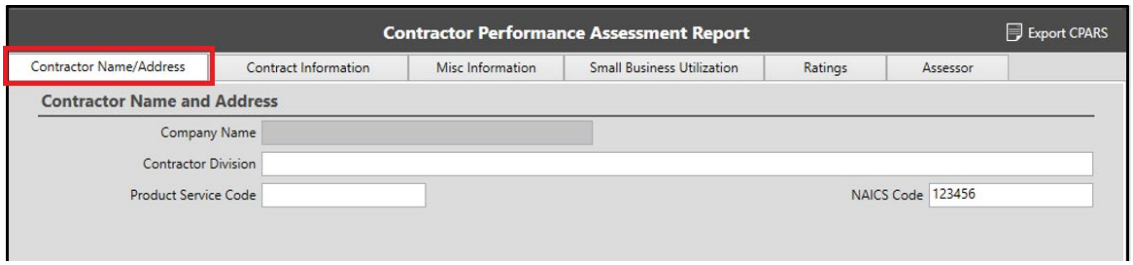
CPAR evaluations can be created using the ***CPAR Evaluations*** module. This will open the Contractor evaluation selection view that contains a data grid with all the CPAR evaluations within the contract.



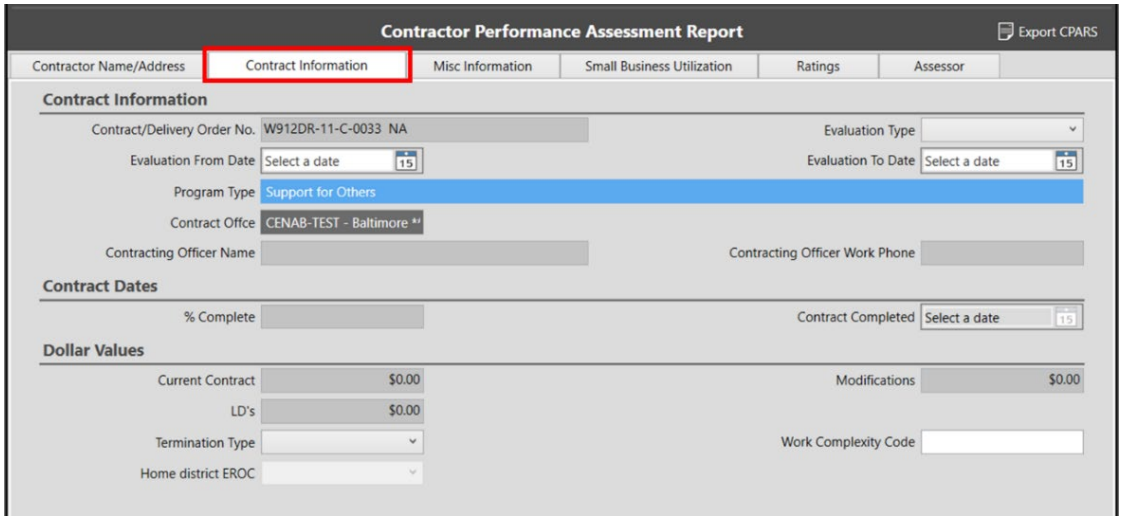
There is currently no direct interface between CPARS and RMS. Information entered into RMS can help organize what needs to be entered into CPARS. Some users have found that it is easier to export the information entered into RMS to a text file, then copy and paste it into the CPARS. Although, how information is entered into CPARs is up to district policy. Please consult with the district in which the contract is administered on how to get information into CPARS.

When adding or editing a CPAR, the following screen will display with six tabs.

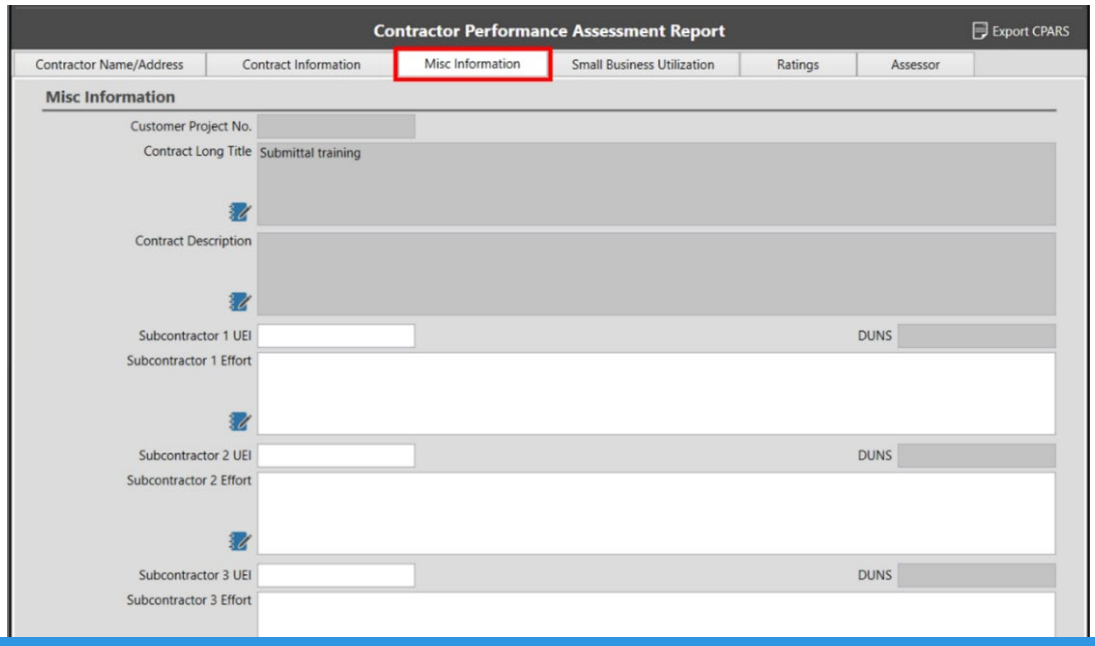
In the ***Contractor Name/Address*** tab, enter the Contract Division, Product Service Code, and NAICS Code.



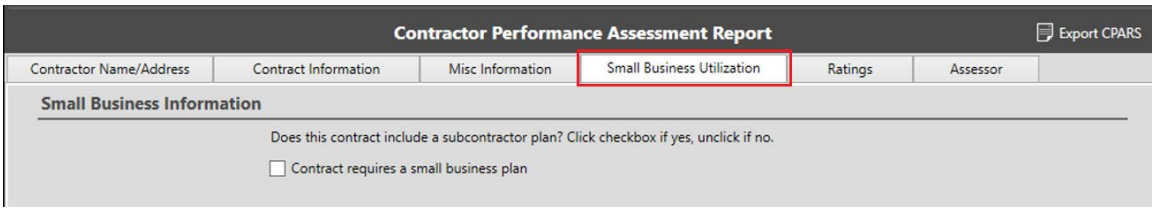
In the ***Contract Information*** tab, enter information about the contract being assessed, to include contract dates and dollar values.



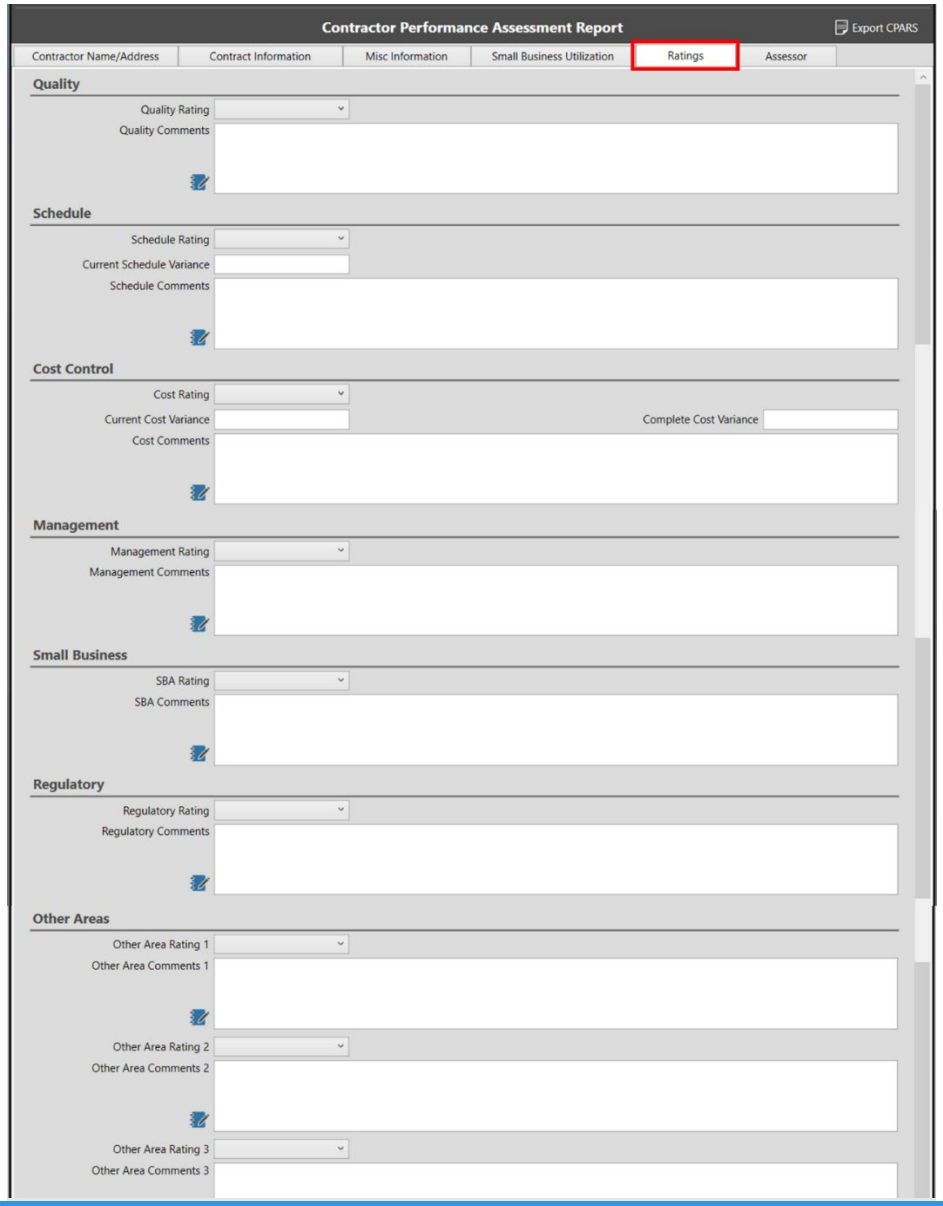
Enter any miscellaneous information in the ***Misc. Information*** tab. The Contract Description will be displayed here along with fields that can be used to document the efforts of up to three Subcontractors on the performance assessment.



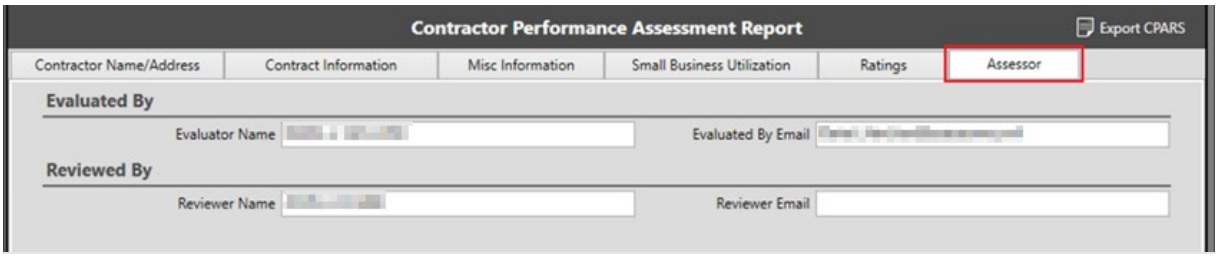
The ***Small Business Utilization*** tab contains a checkbox that should be marked if the contract includes a subcontractor plan.



The ***Ratings*** tab allows input of the rating based upon the Contractor's performance. Rate the Contractor's performance on quality, schedule, cost control, management, small business, and regulatory work. There is also a section to rate the Contractor in other areas that report based on performance. The Contractor can be rated using the schedule rating drop-down selection that includes ratings from unsatisfactory to exceptional. There is also an "N/A" option if the rating is not applicable for the current assessment report.

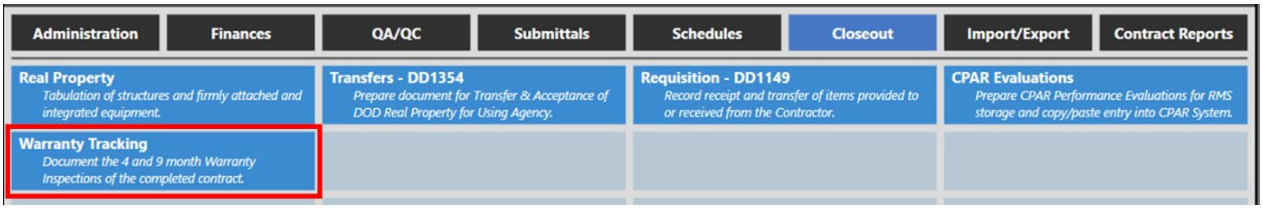


The ***Assessor*** tab contains information about who evaluated the Contractor and who reviewed the performance assessment report.



After completing the CPAR, the report can be exported by clicking the *Export CPARS* button located in the top right-hand corner. This will prompt the user to select a location using the file explorer. The CPARS document will be exported in .txt format. To remove a CPAR that has been added, select one from the selection view and click the *Delete* button before confirming the deletion.

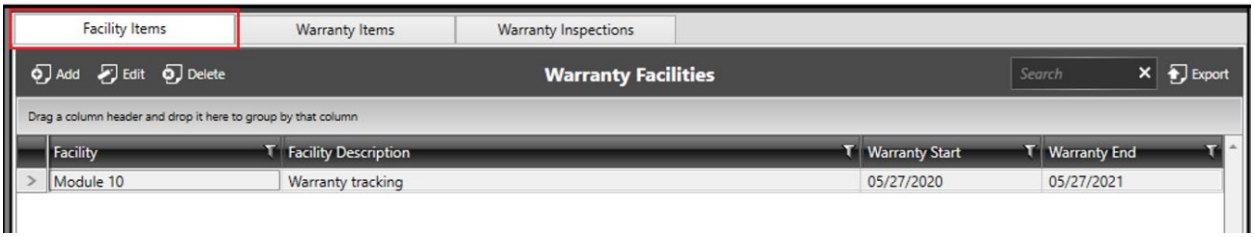
10.5 Warranty Tracking



The ***Warranty Tracking*** module allows users to create warranty and warranty inspection items for both a 4-month and 9-month inspection periods. Both the Government and Contractor can add warranty items and warranty inspection items. This module can be accessed from within the ***Closeout*** tab.

Upon entering the ***Warranty Tracking*** module, three tabs will be displayed, which are facility Items, warranty items and warranty inspection items.

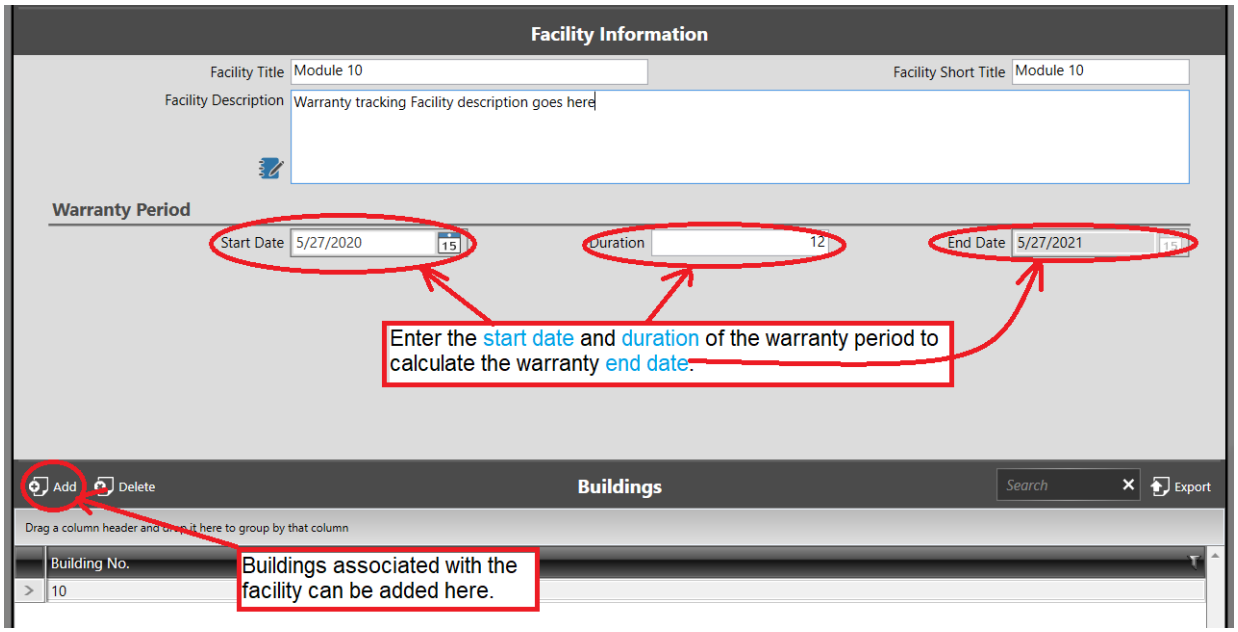
The first tab, ***Facility Items***, are only available to Government mode, on this tab the data grid with a list of all the facility items within the contract is displayed.



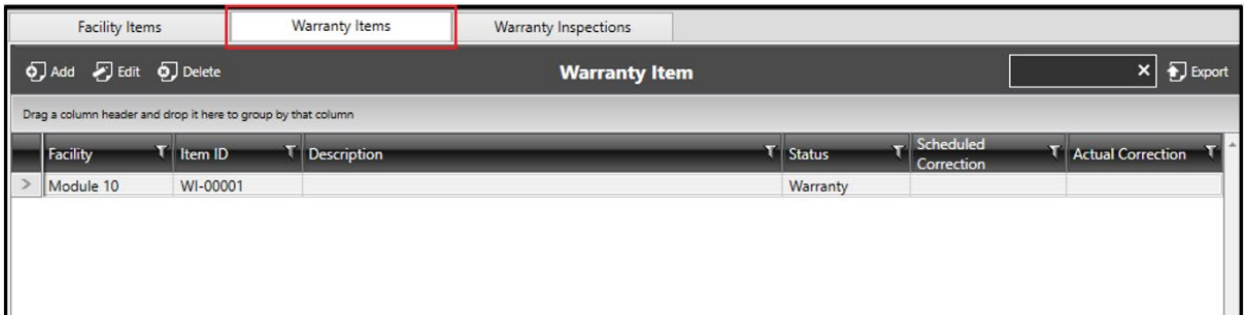
When adding a facility item, a lookup view will be presented to select a phase with which to associate the facility item. After choosing the phase for the facility item, a facility short title and a warranty start date will need to be added.

After adding or editing a facility item, the Warranty Facility Edit View will display. The *Warranty Period* and *Duration* can be entered on this view. The warranty end date is based on the start date and duration. Facility items can also be associated with building items which contain the building numbers.

Note: If an item needs to be deleted, select the item and click the *Delete* button before confirming deletion.



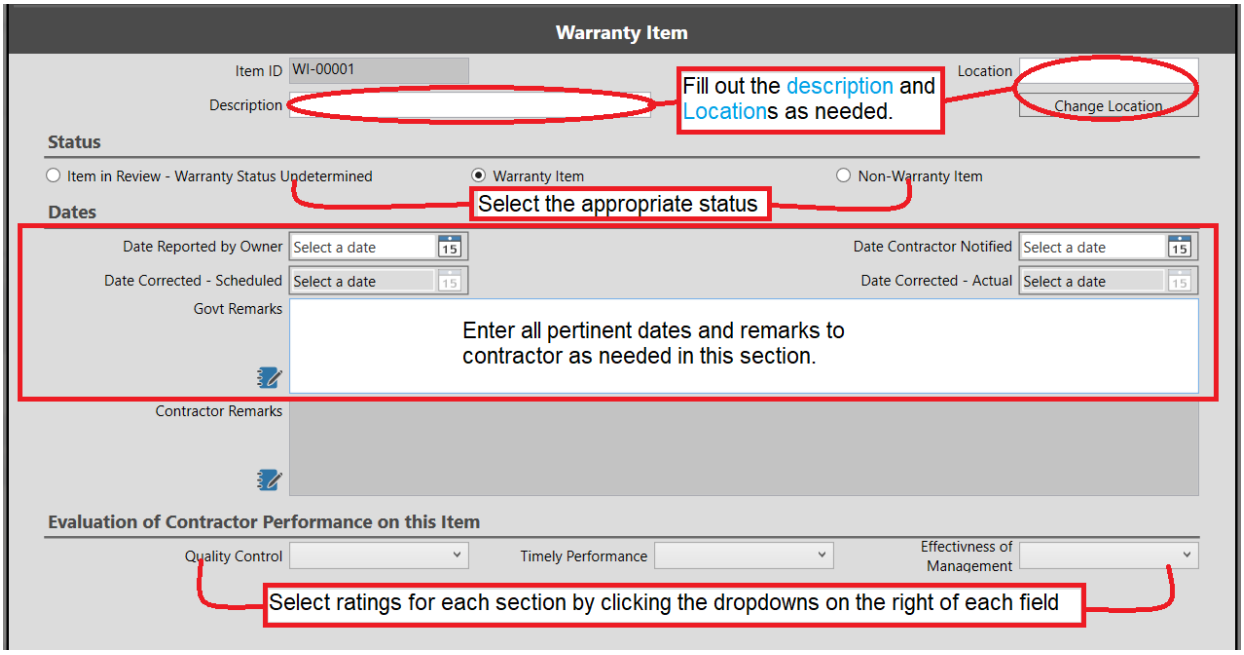
The ***Warranty Items*** tab contains a data grid with all the warranty items within the contract, all warranty items are associated with a facility item. When adding a warranty item, a lookup will be presented to choose a facility item to associate the new warranty item with. RMS will automatically generate a new warranty item ID based on sequential order.



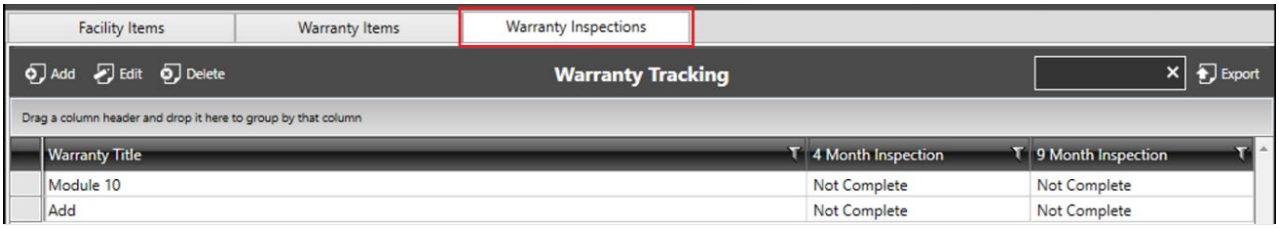
After adding or editing a warranty item, the warranty item edit view will be opened. This view allows information regarding the warranty item to be entered.

The warranty *Location* can be filled out either using the text field or the *Change Location* button. This button grabs a list of all the locations used on other warranty items for quick selection. Changing the status of the warranty items will present different input fields under the dates section to fill out. Warranty items also contain a section to evaluate the Contractor performance of the warranty item.

Note: If an item needs to be deleted, select the item and click the *Delete* button before confirming deletion.



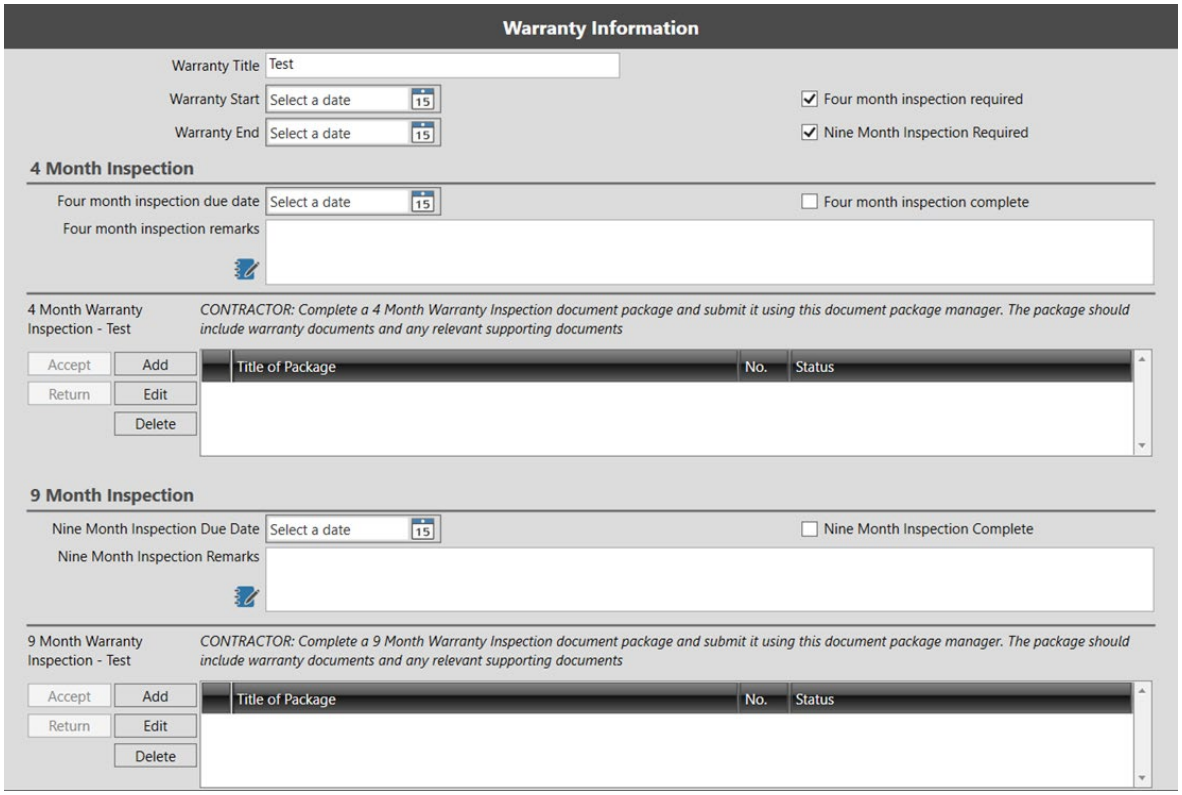
The ***Warranty Inspections*** tab contains a data grid with all the warranty tracking items within the contract.



When adding warranty inspection items, a warranty title will need to be created to add the warranty inspection item.

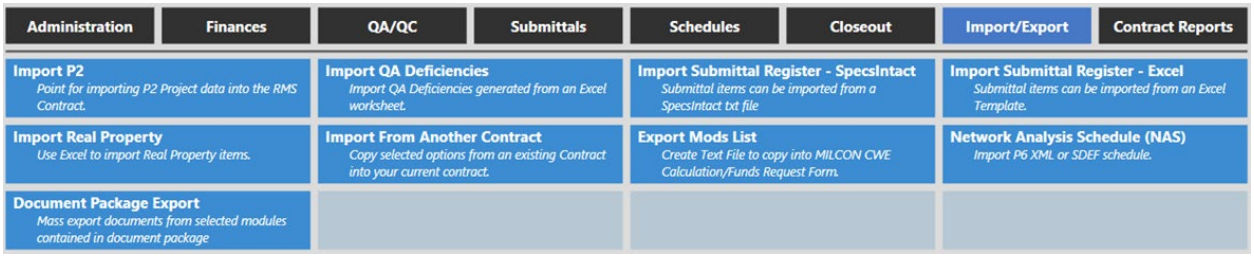
After adding or editing warranty inspection items the warranty inspection edit view will be opened. Warranty inspection items can have both a 4-month or 9-month inspection period. There are also Document Packages for each inspection month period, the Document Package should include warranty documents and any other relevant supporting documents.

Note: If an item needs to be deleted, select the item and click the *Delete* button before confirming deletion.

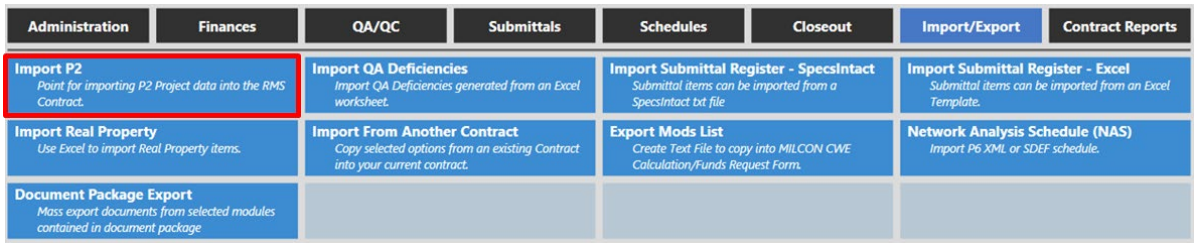


11.0 IMPORT/EXPORT

The ***Import/Export*** tab contains the import and export functions of the data necessary for many of the RMS day-to-day tasks.

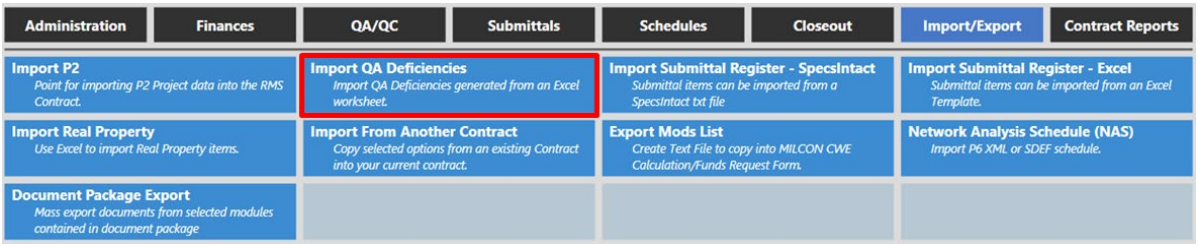


11.1 Import P2

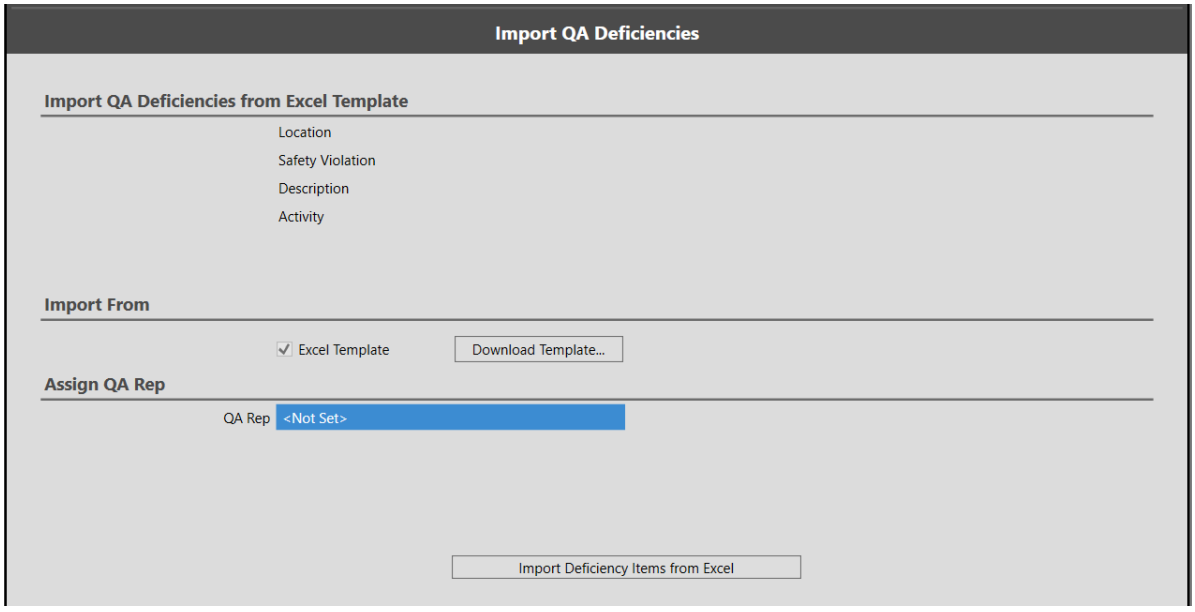


RMS now includes a server process which keeps all districts up to date with the latest P2 data. There is no need to manually import P2 data or schedule an import time. This process runs continuously and will generally reflect all changes from P2 within an hour of the change.

11.2 Import QA Deficiencies

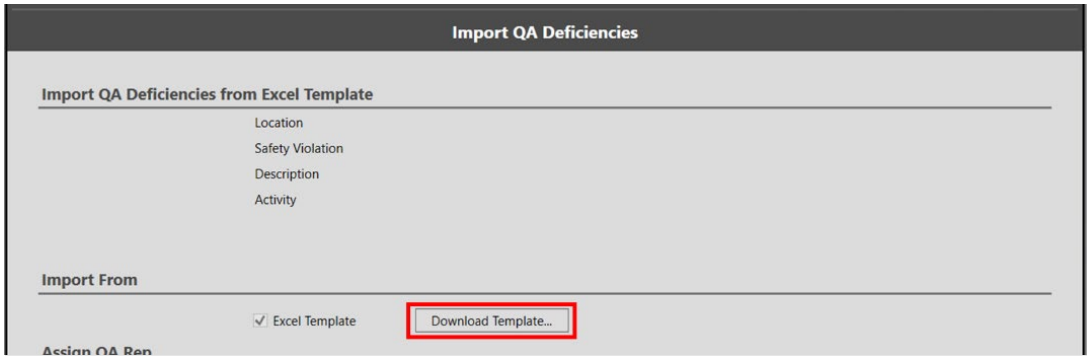


The ***Import QA Deficiencies*** module provides the ability to import large numbers of deficiencies with the use of a batch input file when manually entering the information is not an efficient use of time.

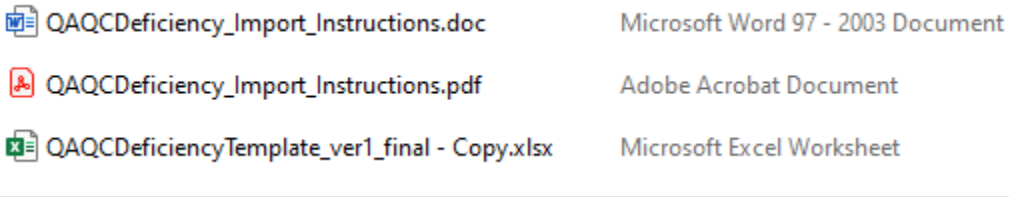


11.2.1 Excel Template for Deficiencies

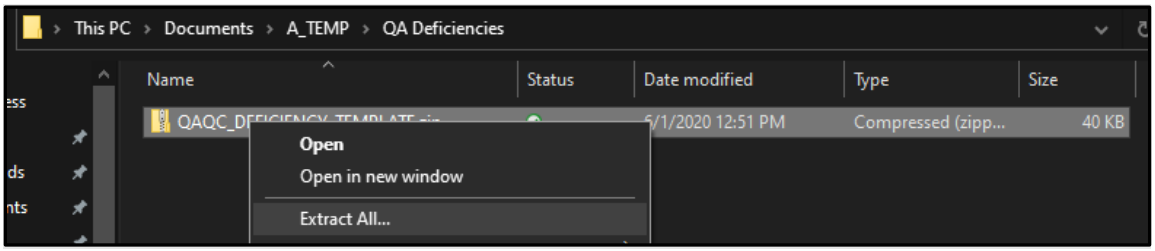
To begin the process of importing QA deficiencies first click the *Download Template* button.



The downloaded file is a zip file that contains the instructions, in both Microsoft Word and PDF format, and the template itself. As seen below.

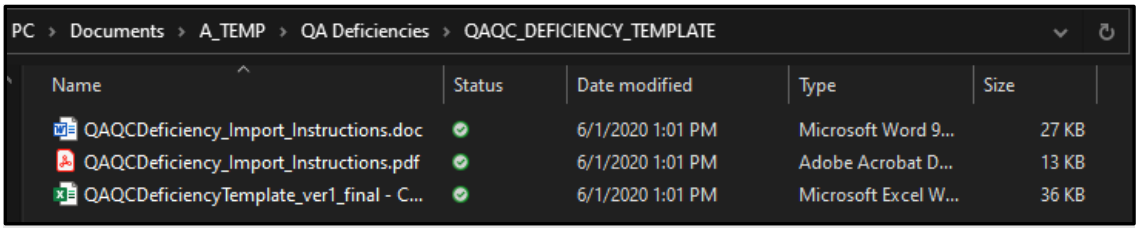


Extract all documents from the zip file by right-clicking on the zip file and selecting, *Extract All*, then select a location to store the files in the file system.



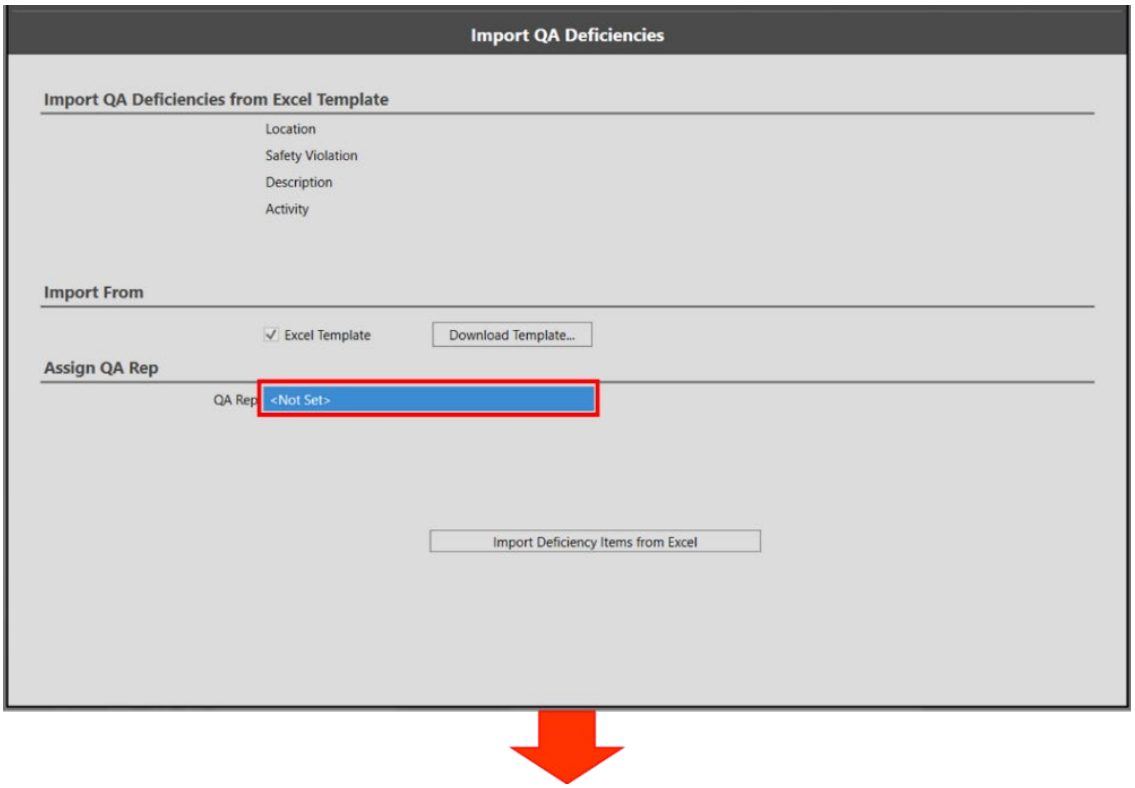
Note In Windows 10, that if *Extract All* does not show in the menu shortcut, double click on the zipped folder to open it. Navigate to the *Compressed Folder Tools* option first. Then click on *Extract All*.

The extracted files:

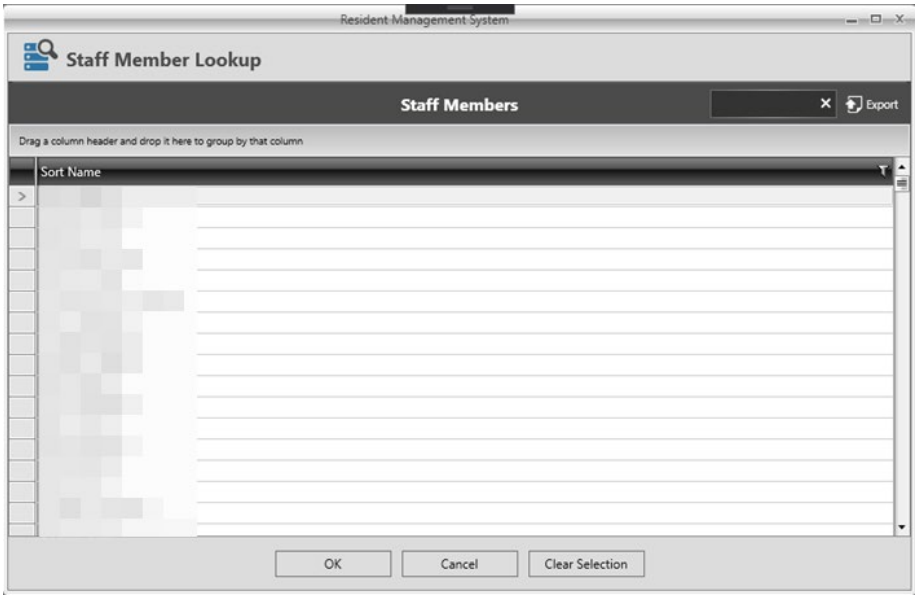


Open and review the import instructions for specific instructions on how to correctly enter data into the Excel template. It is important to review the import instructions due to the restrictions that are necessary to correctly import the data into RMS. Failing to correctly enter the data will result in an import error.

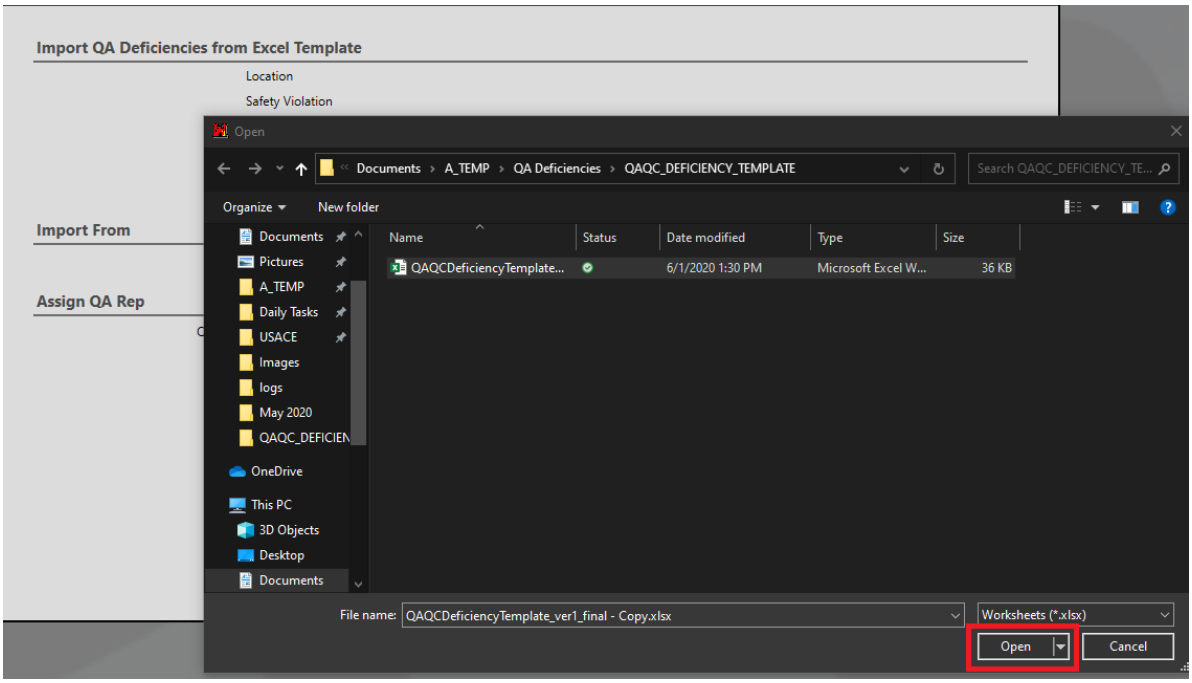
Next, a *QA Rep* selection is required. Click in the blue field next to the *QA Rep* title to display the *Staff Member Lookup*.



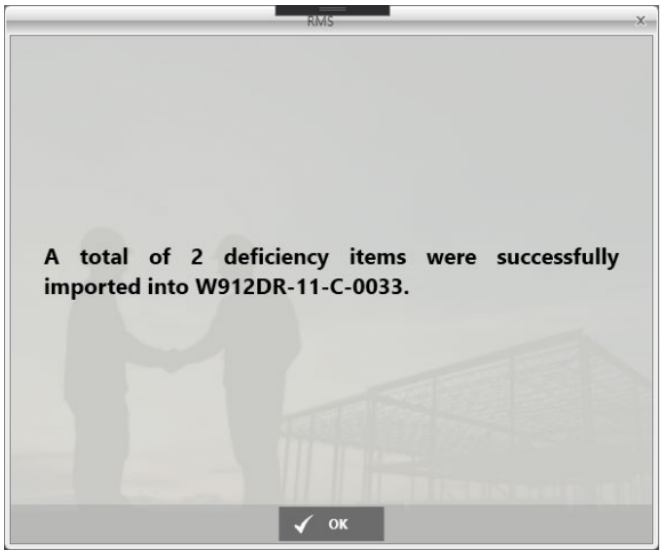
Use the search box in the upper right-hand corner to quickly locate the staff member. Select the correct staff member, then click *OK*.



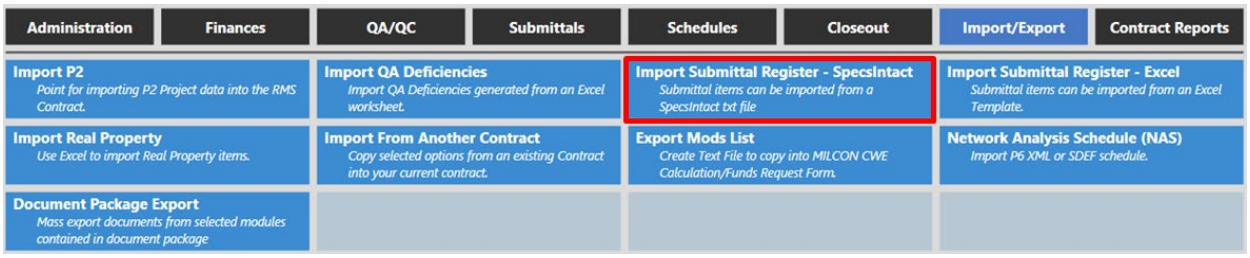
When ready, click the *Import Deficiency Items from Excel* button and locate the completed deficiency batch file. After selecting the document that contains the deficiencies to import click, *Open* in the Windows file selection view.



If the batch file was correctly filed, an alert will display acknowledging the successful import.



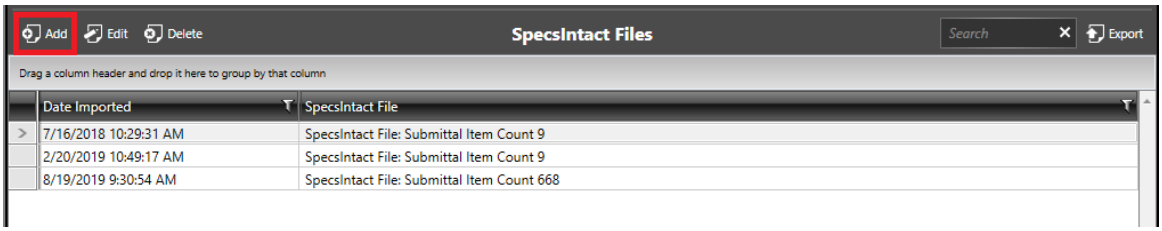
11.3 Import Submittal Register - SpecsIntact



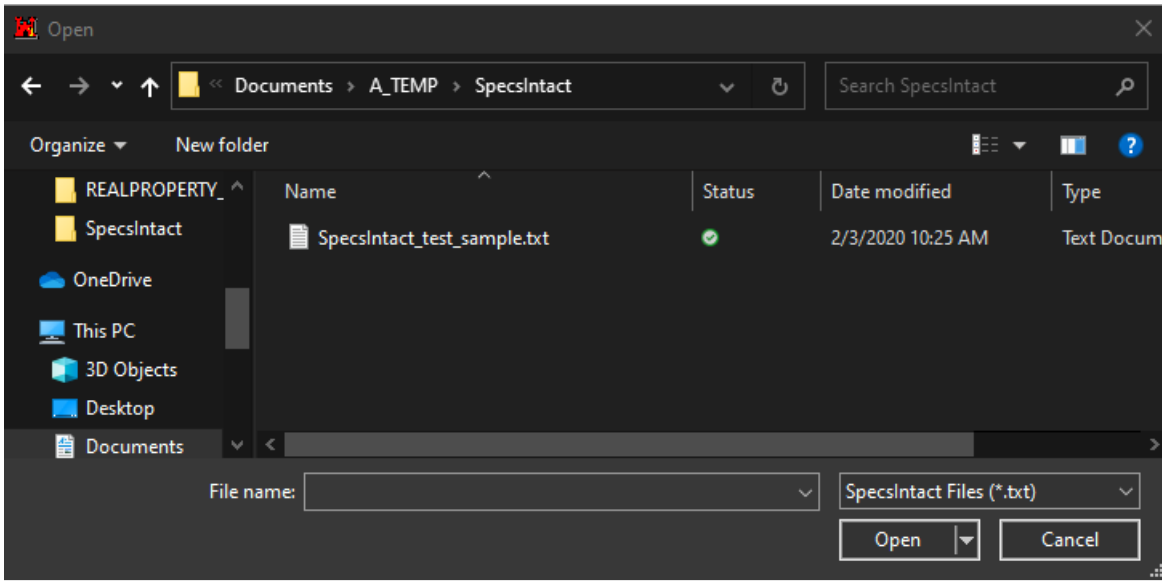
The ***Import Submittal Register - SpecsIntact*** was designed to allow Submittal Items to be imported into the contract in bulk with the use of a SpecsIntact-generated file. The SpecsIntact software was created by NASA (https://specsintact.ksc.nasa.gov/) and can be used free of charge.

> *Note:* Ensure that the SpecsIntact file has been exported to a .txt file prior to initiating import into RMS. The only accepted file type is an exported SpecsIntact File (*.txt). Direct SpecsIntact files (.sec) are not accepted.

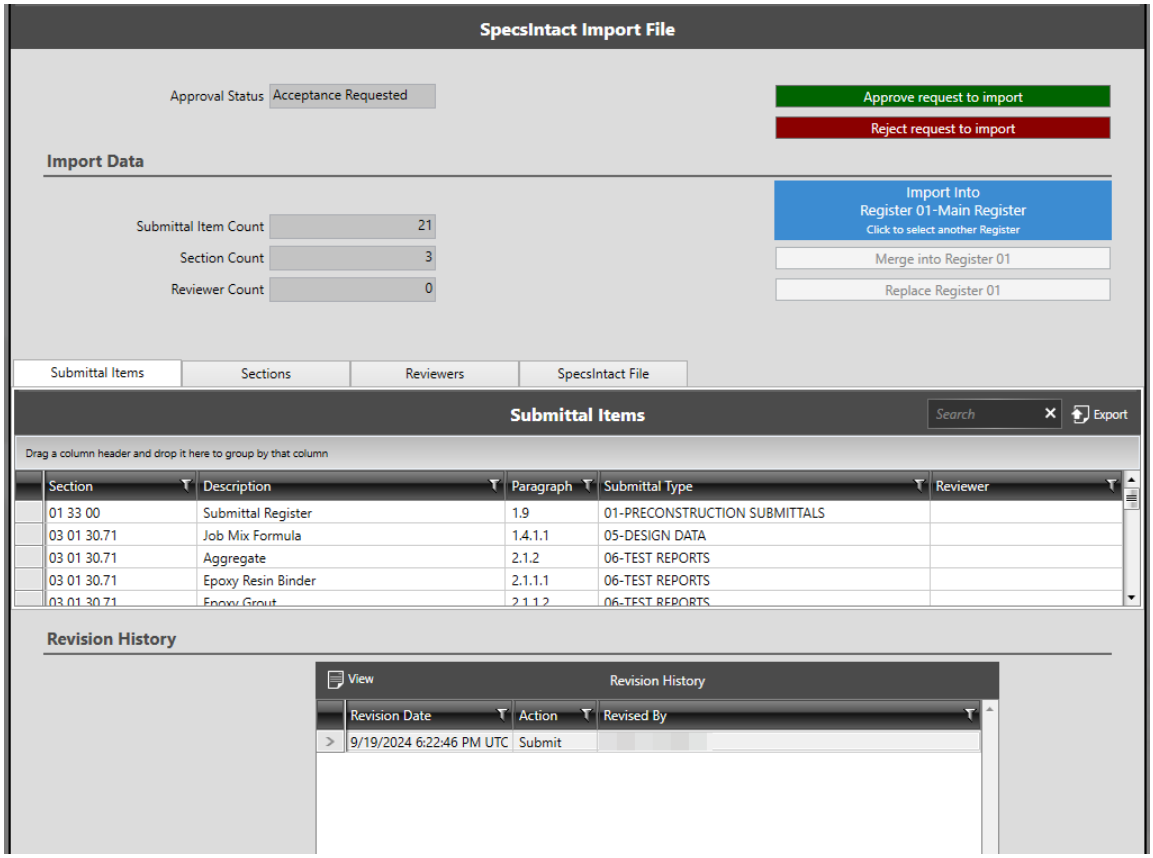
To initiate the import of Submittal Items into RMS via a SpecsIntact text generated file, click the *Add* button in the upper left-hand corner.



The *Open* dialogue will display. From here locate the SpecsIntact file to import and click, *Open*.



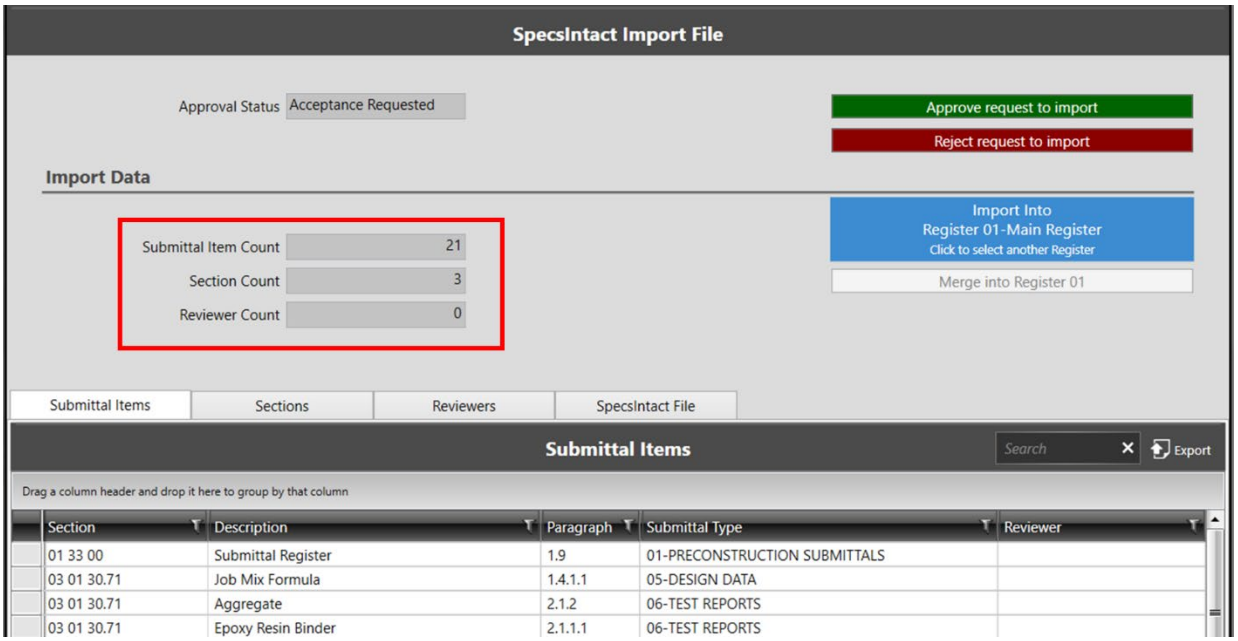
RMS will parse the data and display it in the edit view:



To help confirm the data being imported, the edit view displays useful information about the contents of the file being imported. This same view can also be used for a selected file that was already uploaded and will display automatically when a new file is added. At the bottom of the screen is a display of the data contained in the file.

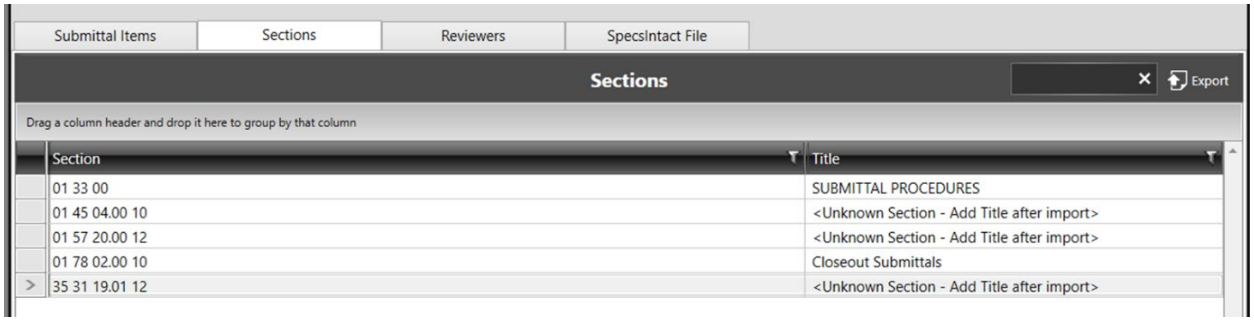
> *Note:* The *Revision History* table will capture revision entries for submission (Submit), acceptance to import (Accept), and/or rejection of the import (Return) only. The revision entries recorded here **will not** capture whether the data was imported into the contract.

In that section, from the top left users can view the *Submittal Items*, *Sections,* and *Reviewers* included in the SpecsIntact file by clicking on the corresponding tabs. Users can also see the raw data of the SpecsIntact file on the ***SpecsIntact File*** tab.

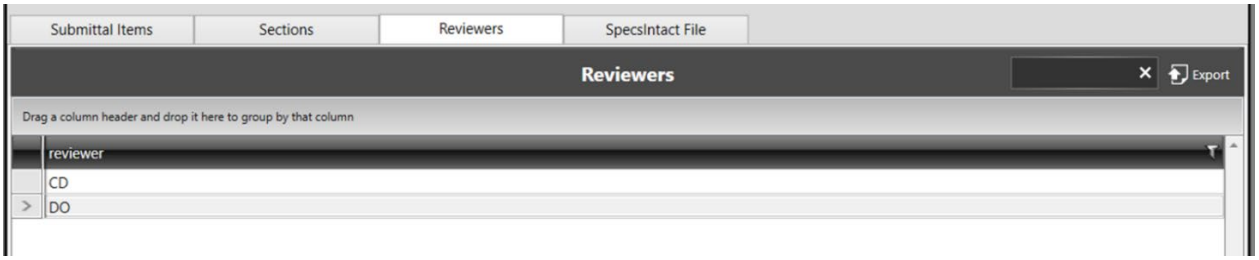


Toggling through the primary tabs will also provide additional clarification about the contents of the file. The ***Submittal Items*** tab displays information about the Submittal Items being created from the uploaded file.

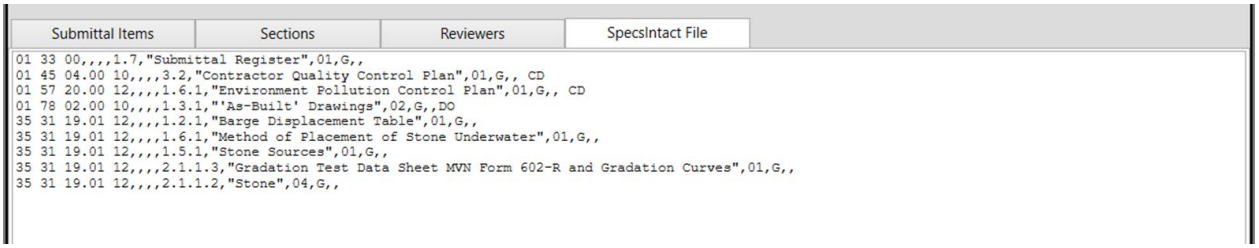
The ***Sections*** tab displays information about the Specification Sections associated with the Submittal Items.



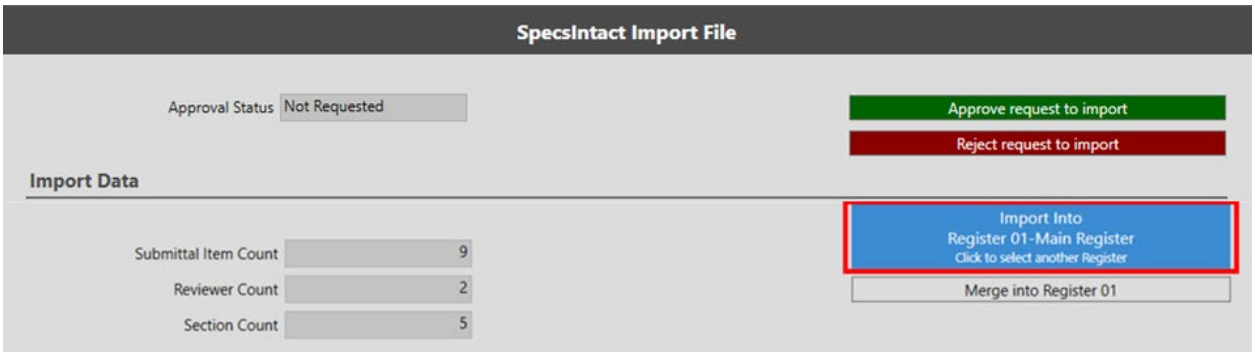
The ***Reviewers*** tab displays the reviewers parsed from the uploaded file.



As stated earlier, the ***SpecsIntact File*** tab displays the uploaded file in its raw format.



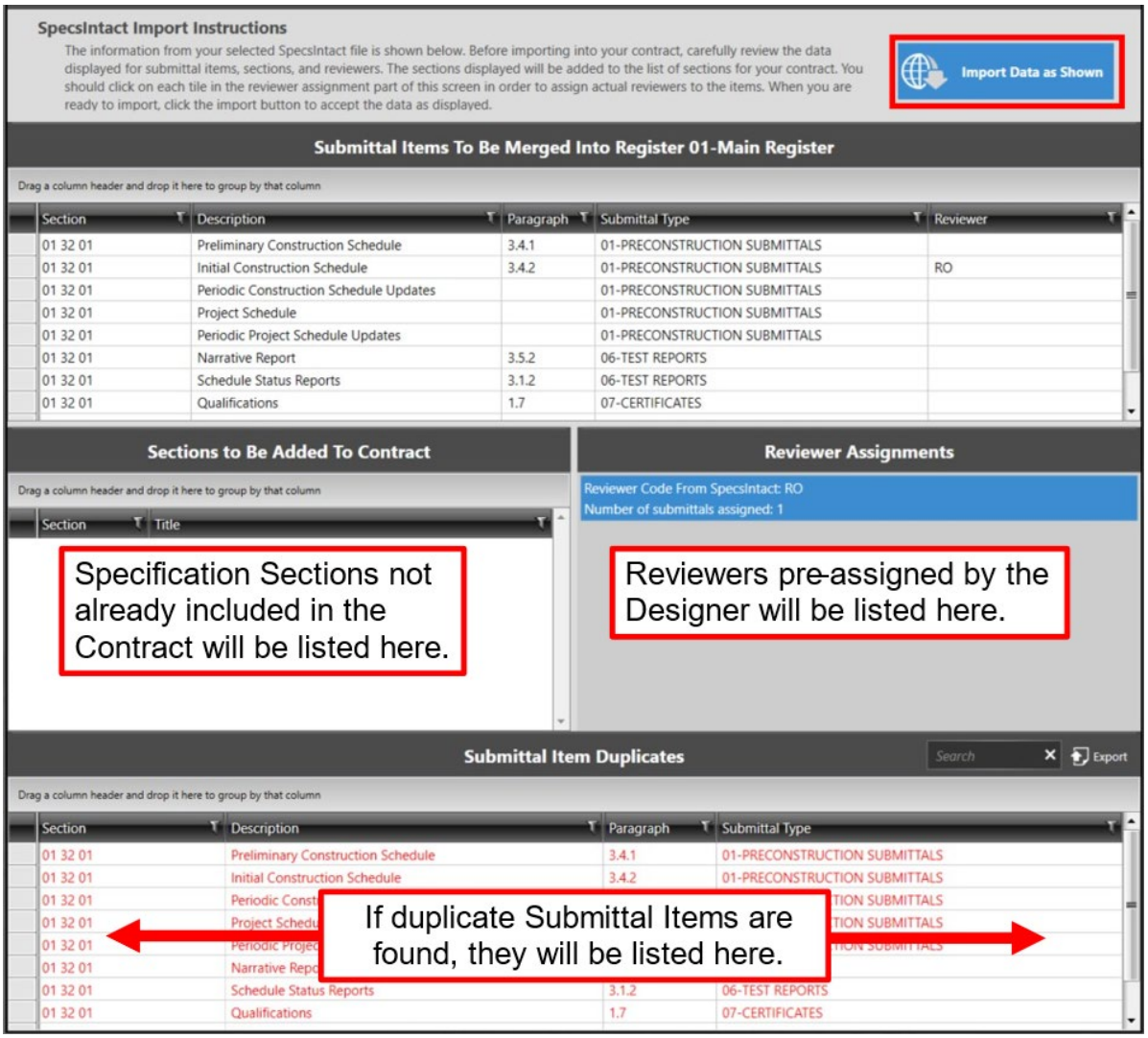
After reviewing the information in the uploaded file, Government users will need to click on the approve or reject request options before the file can be imported. Though it is usually the responsibility of the Contractor to import the file, the Government has the option of completing this task as well. Select the register that will store the imported items. If the contract only has one submittal register, this step can be skipped.



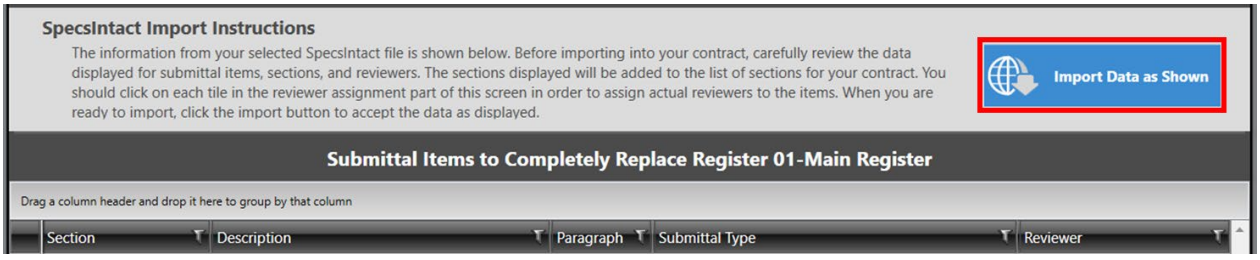
Next, click *Merge into Register* to add items from the file to the already existing items in the contract.

> *Note:* Full Office and District Administrators have the capability to use the *Replace Register* button to delete all existing Contract Submittal Items and replace with the items being imported from the SpecsIntact file. The button will not be viewable to any other users. Contact the appropriate administrator to perform this operation, if needed. A final confirmation will be displayed after choosing either of these options.

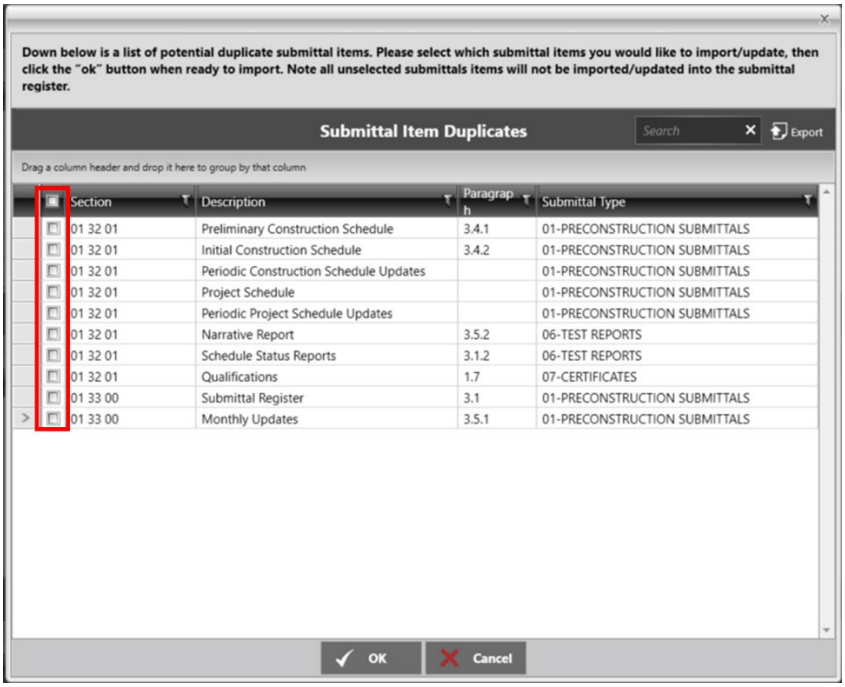
Before committing the import, RMS provides a final review of the data being imported. Including the Submittal Items to replace or merge with the existing Submittal Register, section(s) to be added to the contract, reviewer assignments, and duplicate items found in the import file.



Finally, click the *Import Data as Shown* button to authenticate and complete the process.



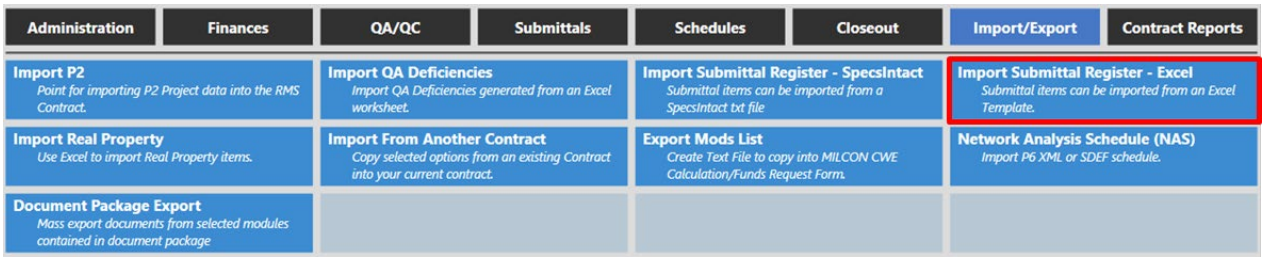
If there are any duplicates found, a window will appear displaying the duplicate items after this button is clicked. Select the items that should still be included in the import. Any items that are not selected and left unchecked will be excluded from the import. Click the *OK* button to confirm the selection(s).



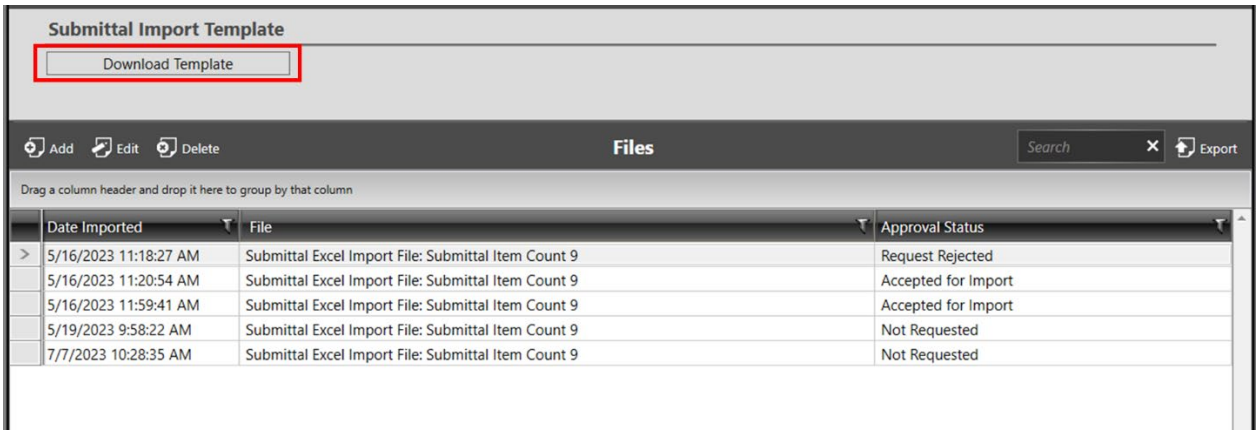
After a successful import, a confirmation view will display the number of sections and items imported:

The imported Submittal Items are now accessible within the ***Submittal Register*** module. Click the blue tiles under *Reviewer Assignments* to replace the abbreviated office or Reviewer code from SpecsIntact with an RMS Account name prior to importing.

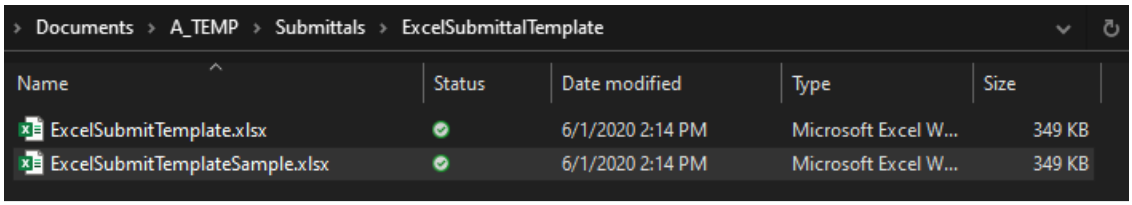
11.4 Import Submittal Register - Excel



The ***Import Submittals - Excel*** module was designed to allow the import of large numbers of submittal items with the use of a properly completed Excel template. Though this process is generally completed by the Contractor, it is available for the Government to do as well.

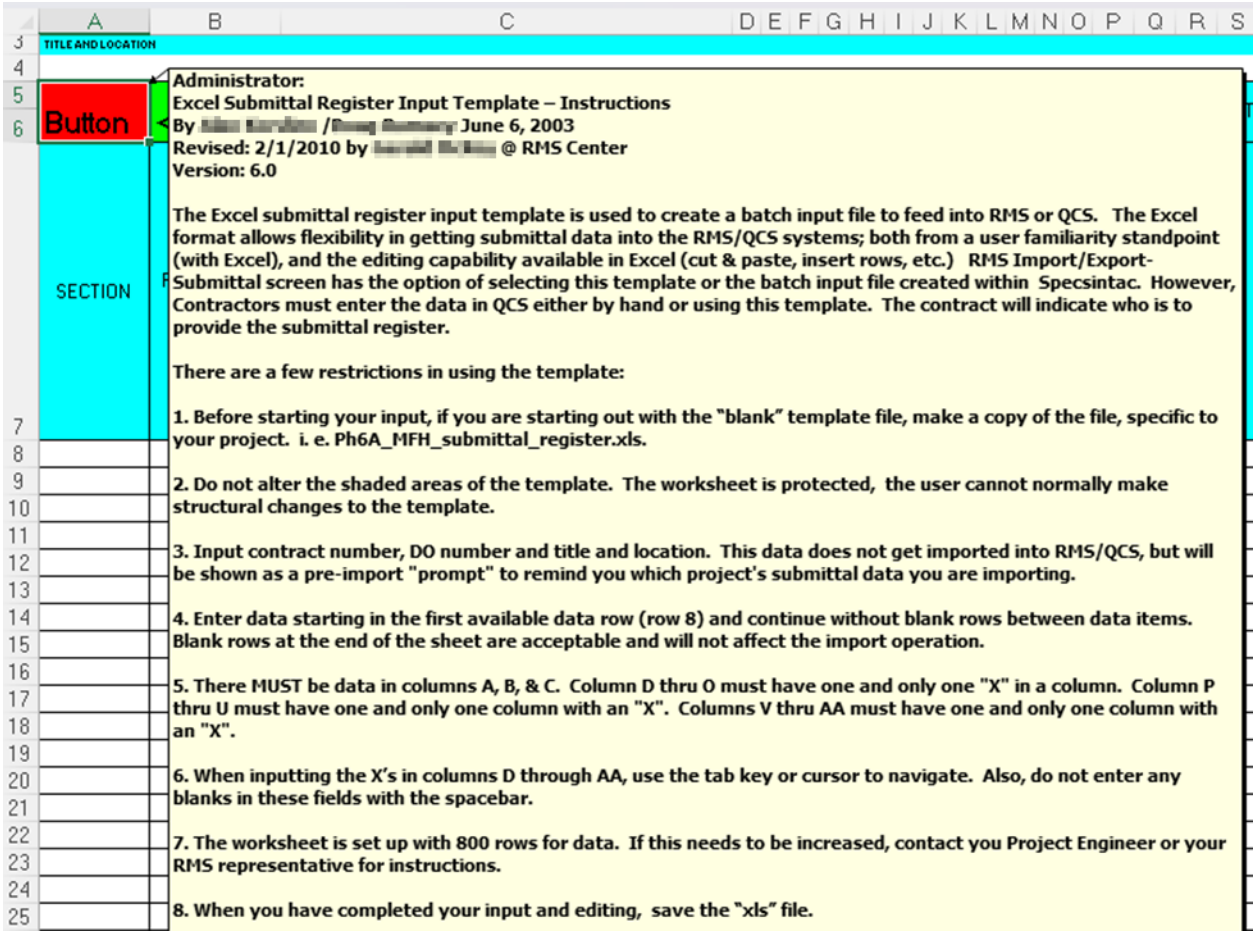


Click on the *Download Template* button to download the submittal template .zip file. Extract the files from the zipped folder to reveal two files: a blank template and a template with example data:



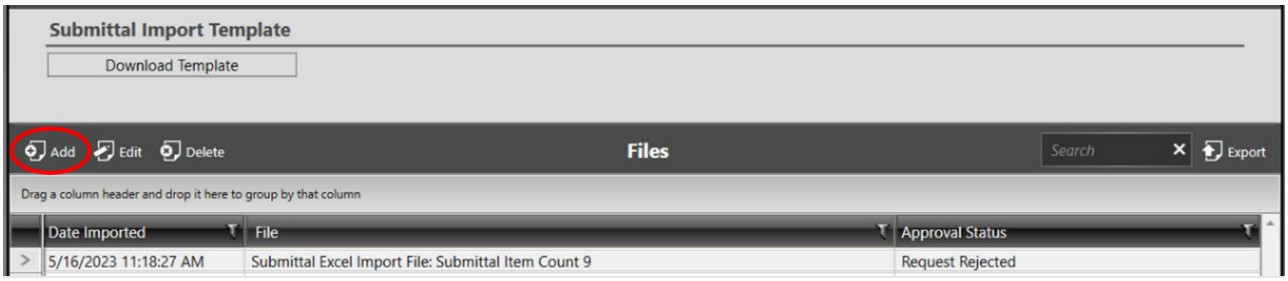
Within the template are instructions for completing the required fields. To access the instructions, open the template file and click in the red field labeled *Button* (right-click for additional options):

Note: RMS only allows .xlsx files to be imported for submitals.

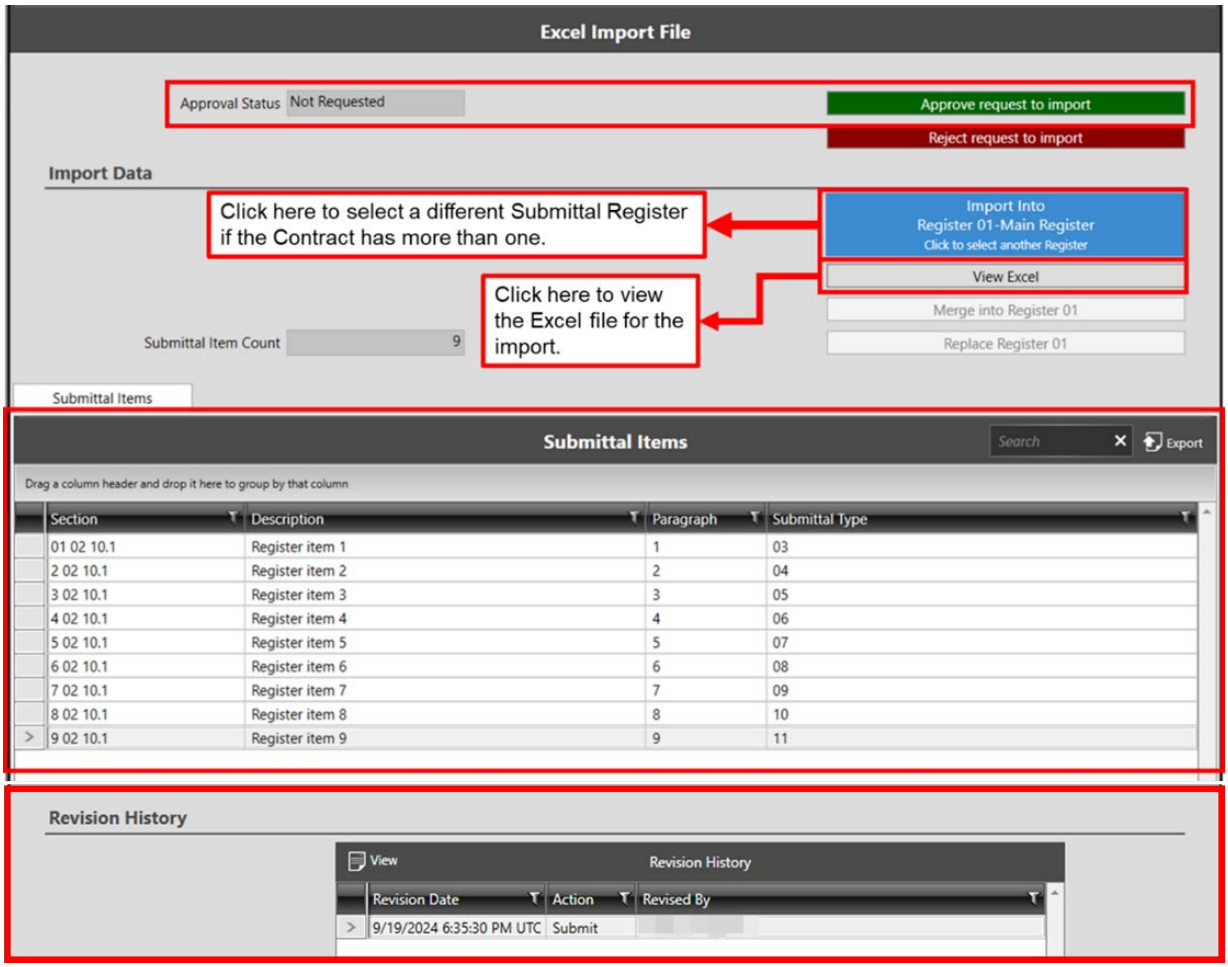


After correctly entering all the information into the Excel template file, click on the *Add* button and select the saved Excel template file from the local file system.

Note that the file must not be open when the *Add* button is clicked, or RMS will display a warning message and will not import the data .



Note: To delete a file, select the line and click the *Delete* button. This will not remove the Submittal Items imported into the Submittal Register. Only the import file will be removed.

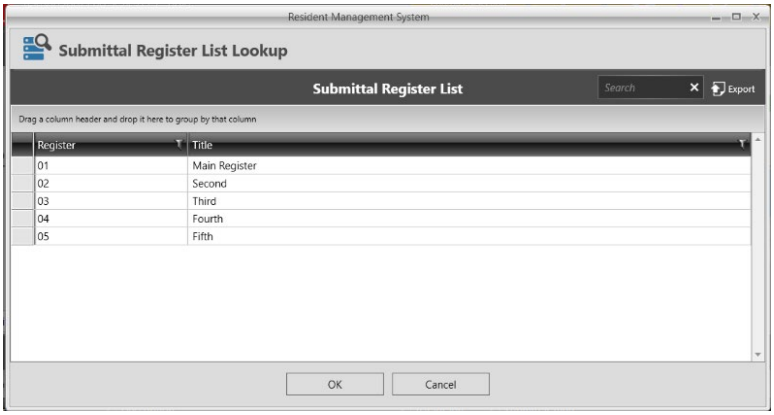


Note: The *Revision History* table will capture revision entries for submission (Submit), acceptance to import (Accept), and/or rejection of the import (Return) only. The revision entries recorded here **will not** capture whether the data was imported into the contract.

Approval Status: All imports must be accepted by the Government before being completed.

Approve Request to import: Click this button to approve the request to import the Submittal Items included in the Excel template file. After clicking this button, the *Merge into Register*/*Replace Register* options will become active.

Reject request to import: If errors are found in the requested import or if updates need to be made, click this button to reject the request to import.



Import Into: This option allows the User to select the submittal register for where the imported file will be stored. When there is more than one Submittal Register in the contract, click in this box and select the appropriate Submittal Register from the selection list.

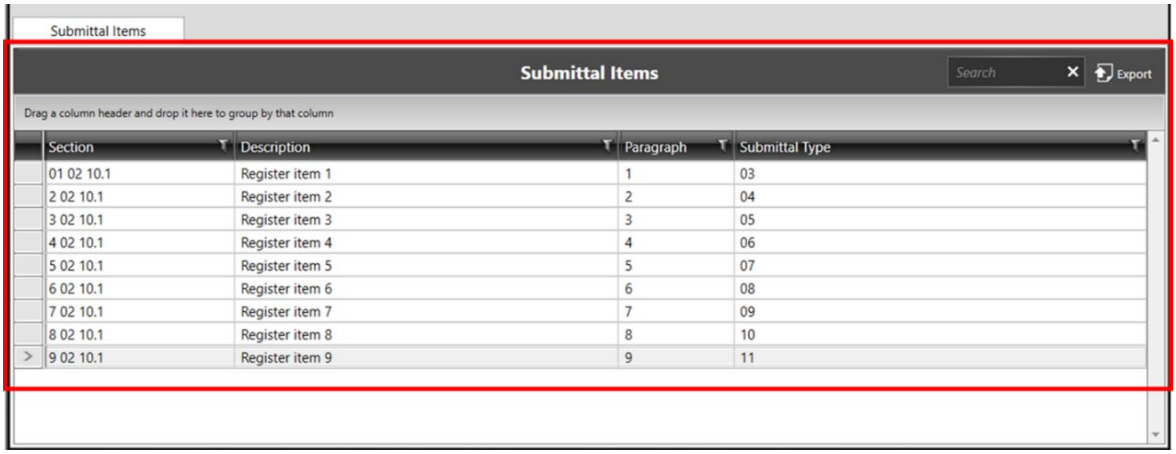
View Excel: Click this button to view the import file in Excel.

Merge into Register: Once the request to import has been accepted, click this button to merge the Submittal Items included in the import file into the contract's Submittal Register. If any items already exist in RMS, then RMS will automatically increment the item numbers to the next in the sequence. This will prevent duplicate items if users chooses to import those items

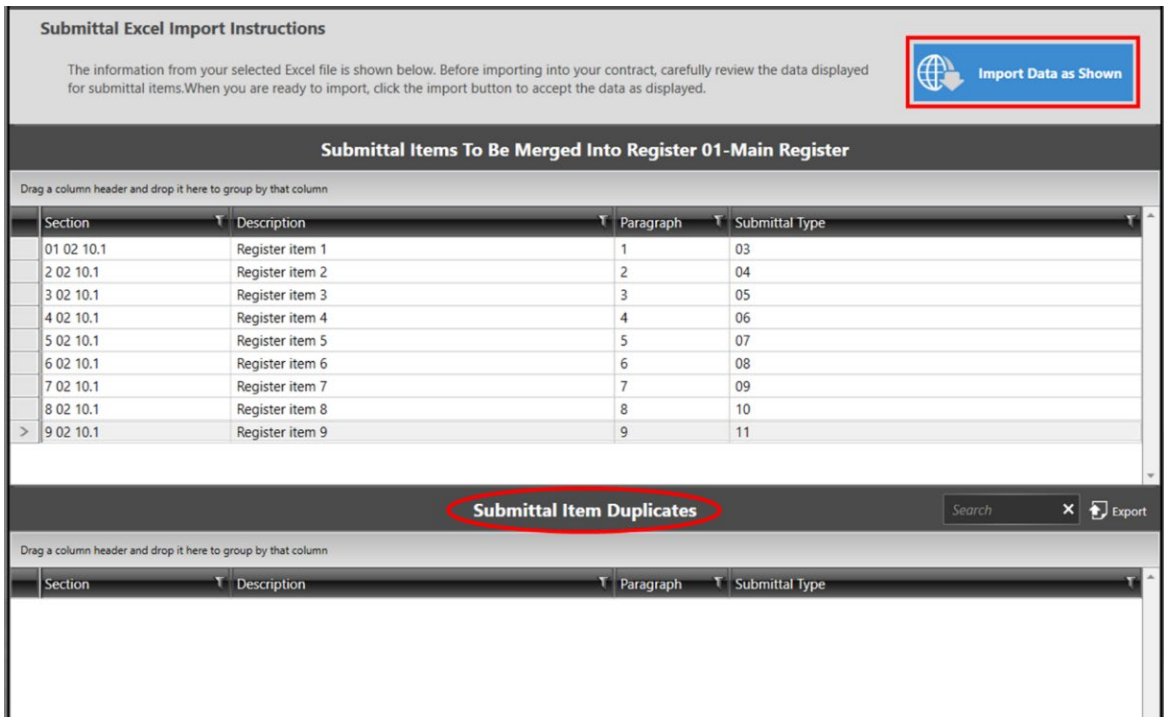
Replace Register: This option will replace all items in the Submittal Register and is only accessible to full Office and District Administrators. Contact the appropriate administrator to perform this action, if needed.

> *Note:* If the option to *Replace Register* is chosen, all existing Submittals will be deleted and overwritten with the data being imported. Any completed Transmittals in the Transmittal Log will be lost. Once the file has been imported, this action is not reversible. Any Submittals being overwritten/deleted cannot be recovered. Unless the User knows that all previous Submittals are not needed, it is advised that users choose to *Merge into Register* and not to select any duplicates that may be present in this file. This is to avoid data corruption of existing items.

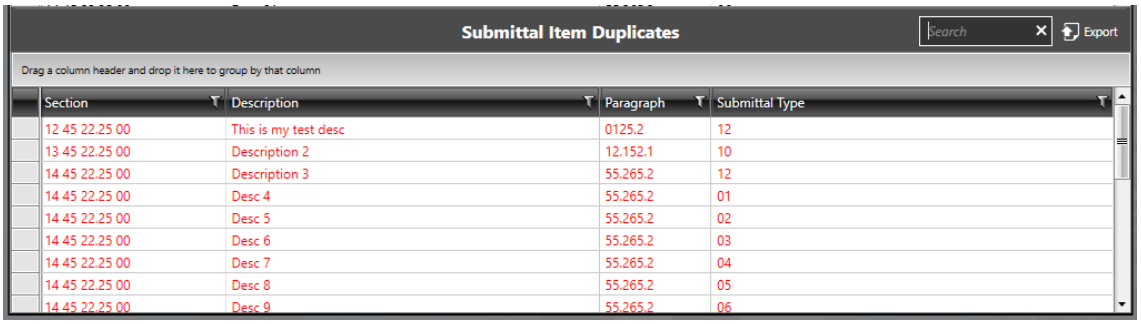
Submittal Items: This tab displays the Submittal Items to be imported into the selected Submittal Register.



Once the *Merge into Register* or *Replace Register* button has been clicked, the screen below will appear to provide a preview of the Submittal Item information that will be imported into the contract.



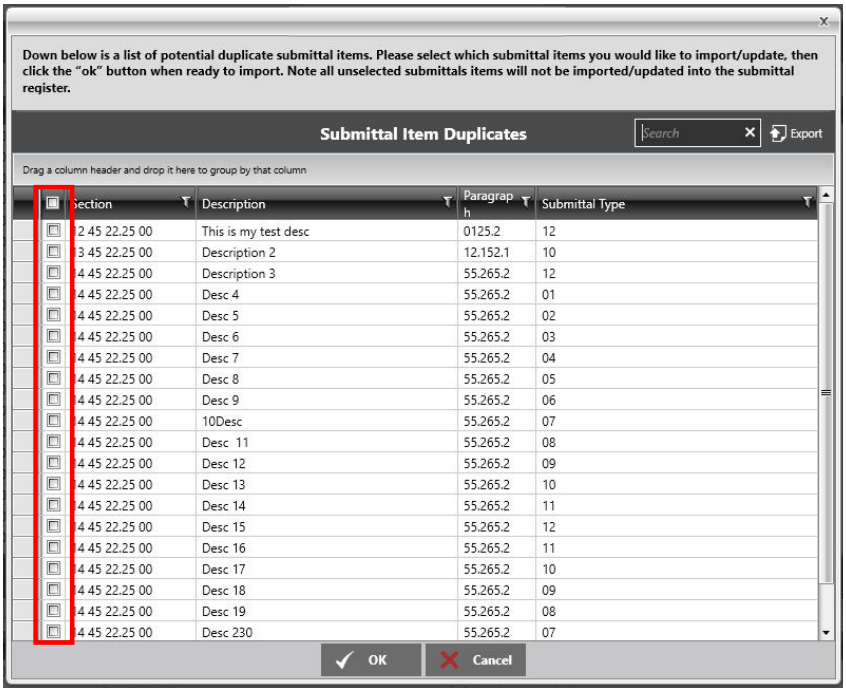
Submittal Item Duplicates: If duplicate Submittal Items are found in the import file, the items will be displayed in the data grid at the bottom of the import preview screen.



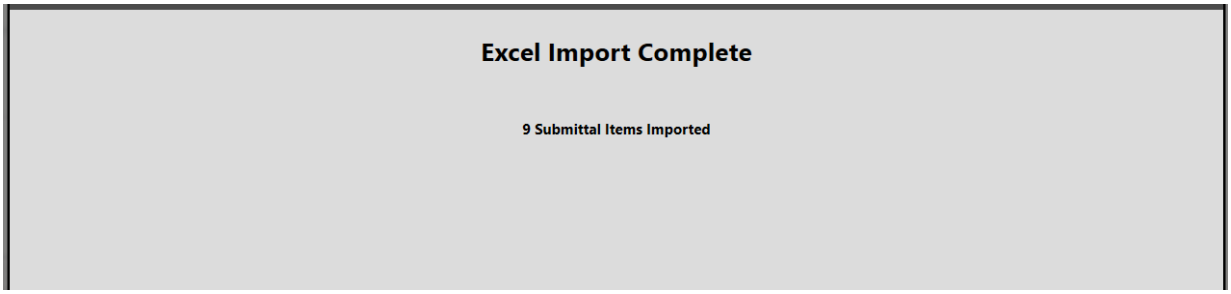
Import Data as Shown: Click this button to complete the import.

After authentication, a successful import will be acknowledged, and all imported submittals will be viewable in the ***Submittal Register*** module. Click the *Back* button three times to return to the contract's main menu or click on the *Contract Menu* button.

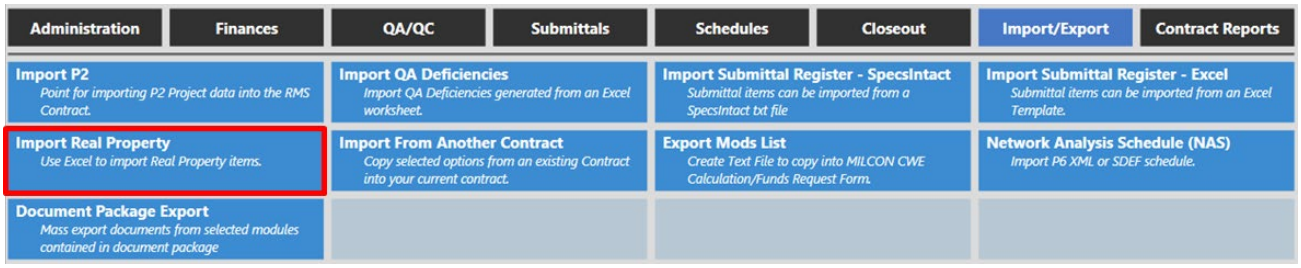
If there are duplicate Submittal Items, a window will appear displaying the duplicate items after the *Import Data as Shown* button is clicked. Select the items that should still be included in the import.



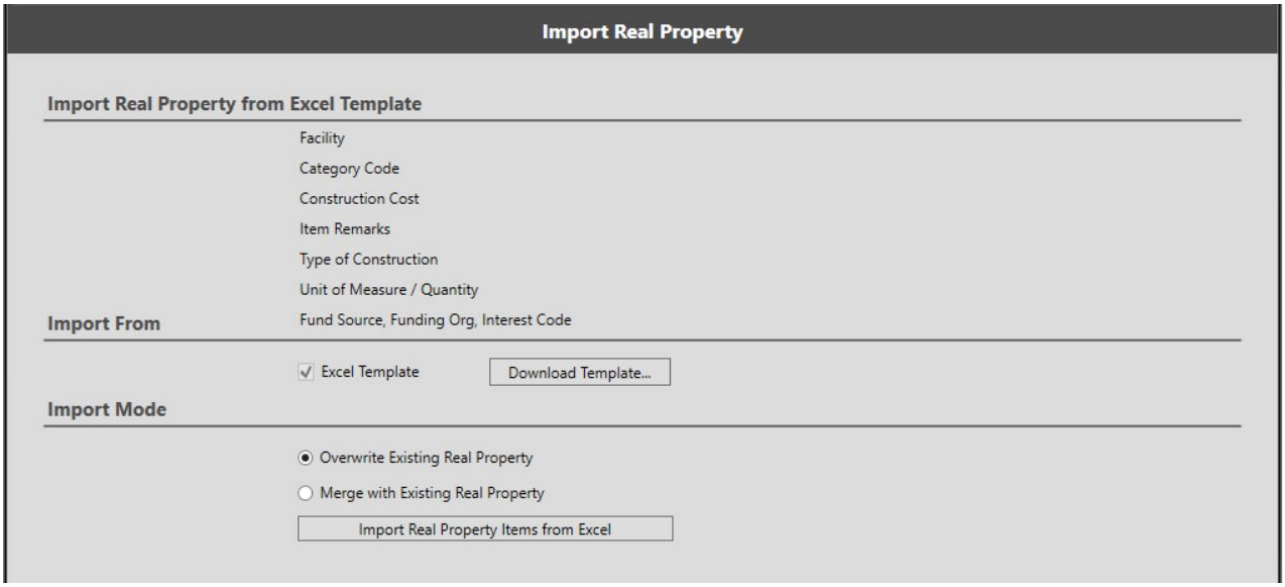
Any items that are not selected and left unchecked will be excluded from the import. Click the *OK* button to confirm the selection(s). Once the import is completed, a confirmation will appear.



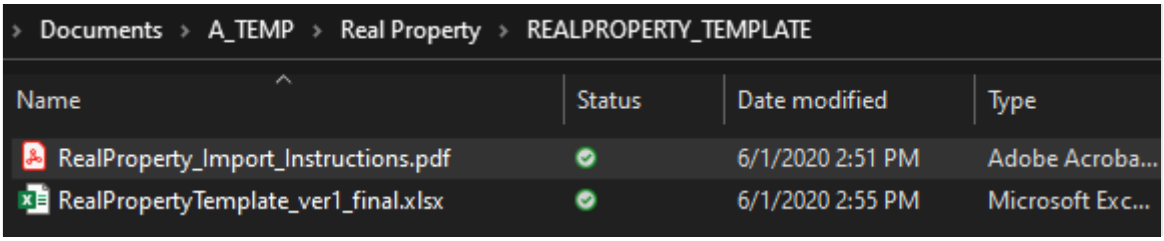
11.5 Import Real Property



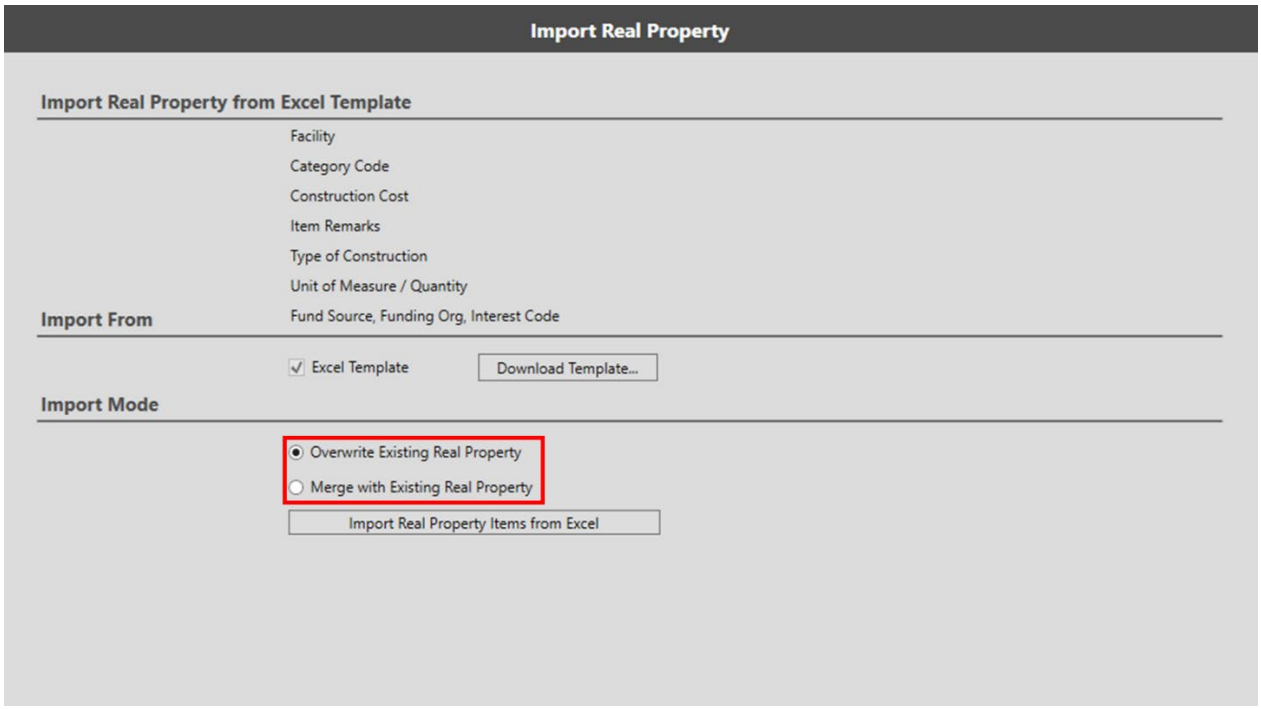
The ***Import Real Property*** module was designed to allow the import of large numbers of real property data with the use of a properly completed Excel template.



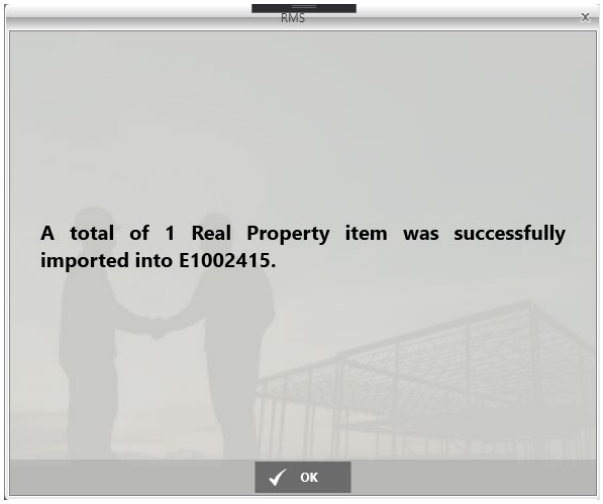
Click on the *Download Template* button to download the real property template zip file. Extract the files from the zipped folder to reveal two files: a blank template and a PDF of instructions for filling the real property template:



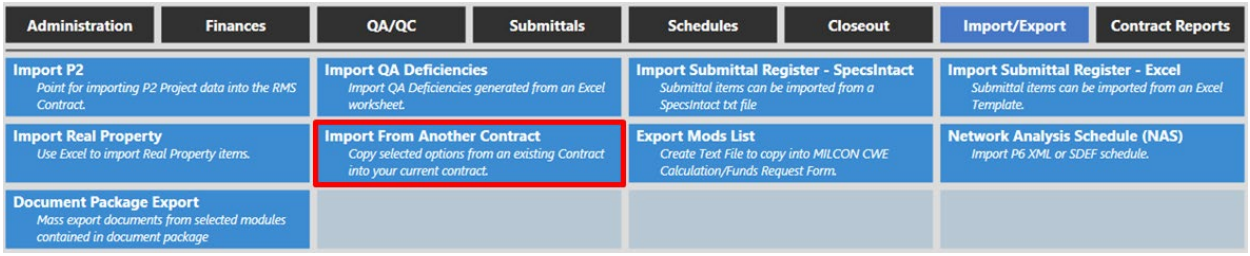
Note: The *Import Mode* determines if the Real Property data being imported will overwrite all existing data or if the Real Property being imported will be merged with the existing real property. If the option to overwrite is chosen all existing Real Property items will be deleted and overwritten with the items being imported. Once the file has been imported, this action is not reversible. Any Real Property items being overwritten/deleted cannot be recovered. If there are any existing items then it is recommended that the *Merge into Real Property* option is chosen since data corruption may occur.



Lastly, when the file is ready to import click the *Import Real Property Items from Excel* button, locate the completed file and click, *Open*. If *Overwrite Existing Real Property* is selected, RMS will require that account credentials be entered for authentication. When the import process is completed, a success alert will display showing the number of Real Property items imported and the Contract ID or Contract Number found in the import file.

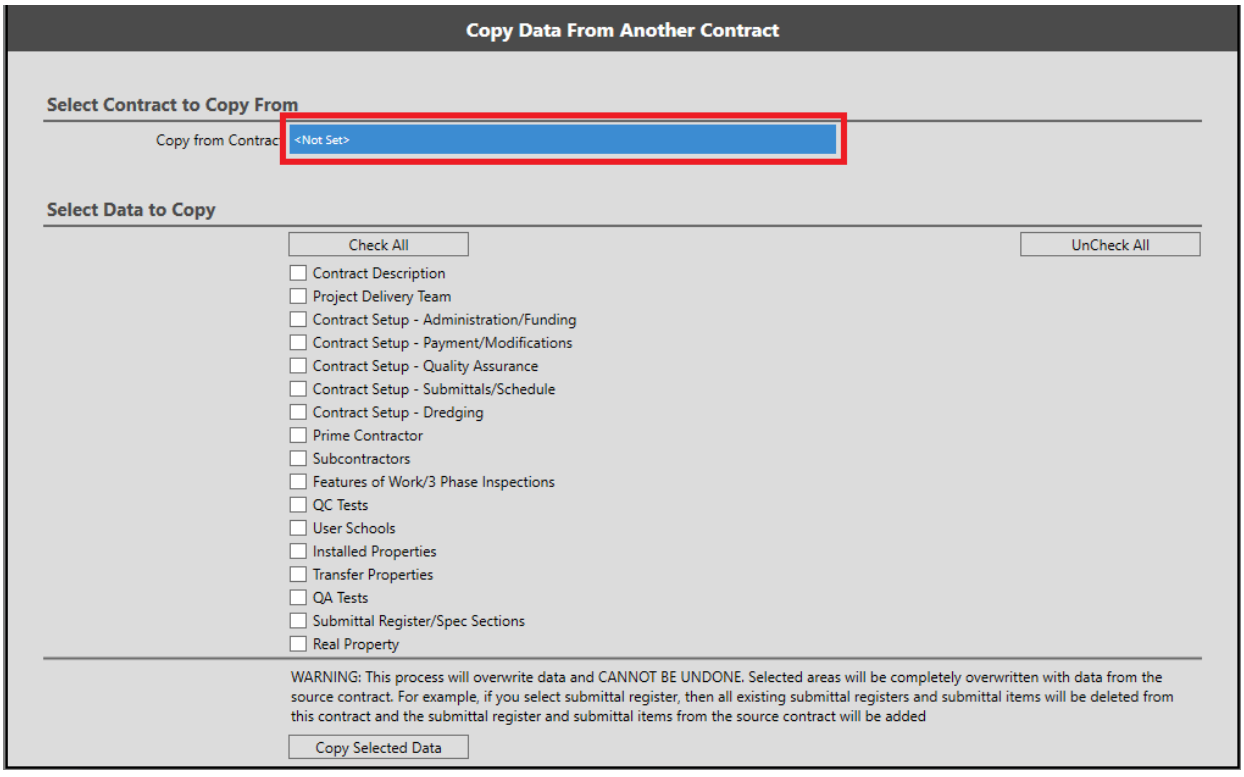


11.6 Import From Another Contract

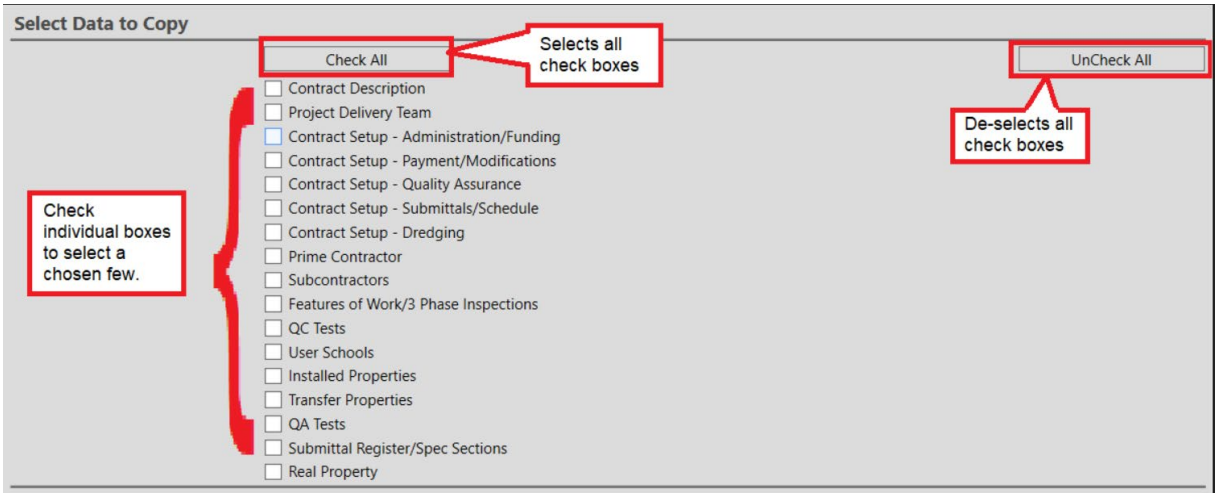


The ***Import From Another Contract*** module was designed to allow the import of contract data from one contract to another.

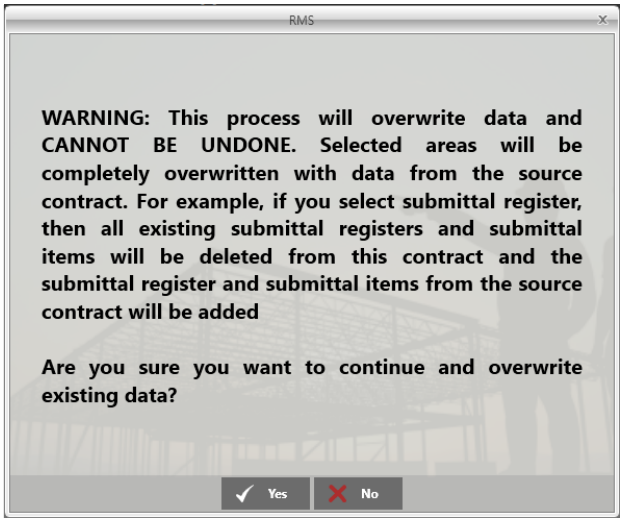
Start by clicking in the blue *Copy from Contract* lookup field to select the contract from which to copy data.



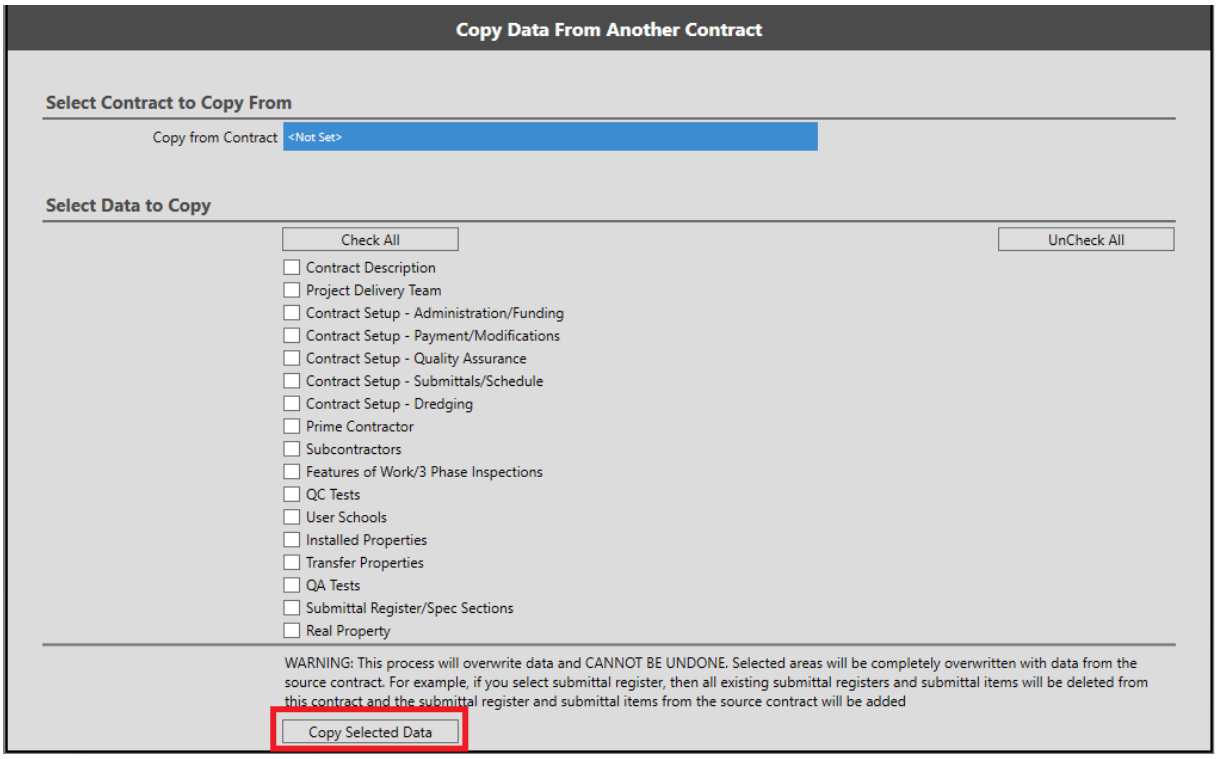
Then select the data to copy from the contract specified by checking the boxes next to the areas from which to copy the data individually or use the *Check All/UnCheck All* buttons to select and deselect all options:



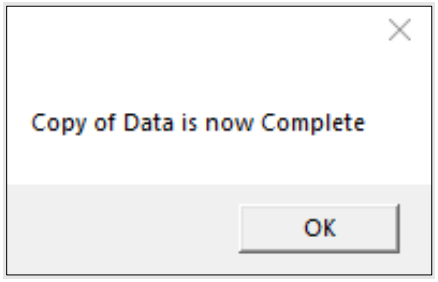
Note: The copying of data from one contract to another will overwrite existing data in the area selected. Once the file has been imported, this action is not reversible.



Lastly, click, *Copy Selected Data* to copy data selected from the contract indicated into the current contract:

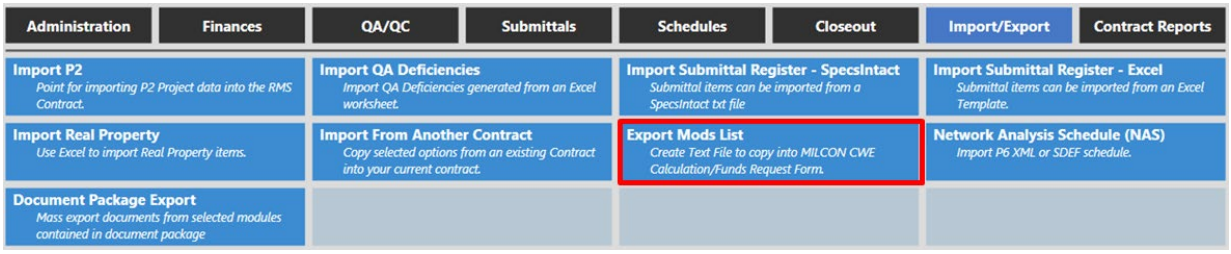


When the process has completed successfully an alert will display to confirm:

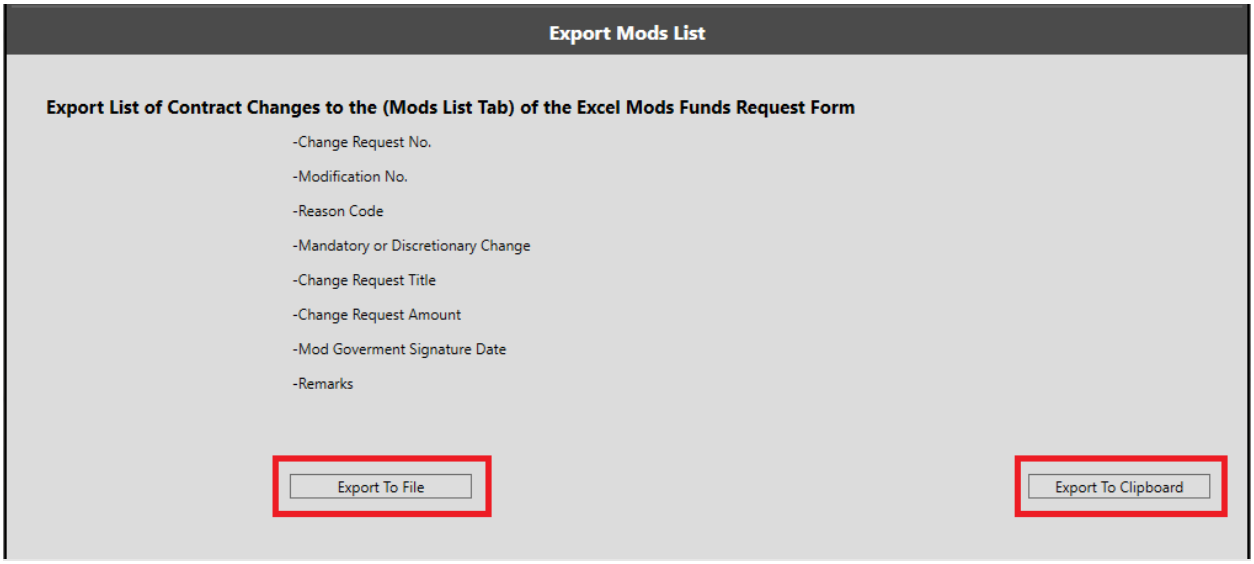


11.7 Export Mods List

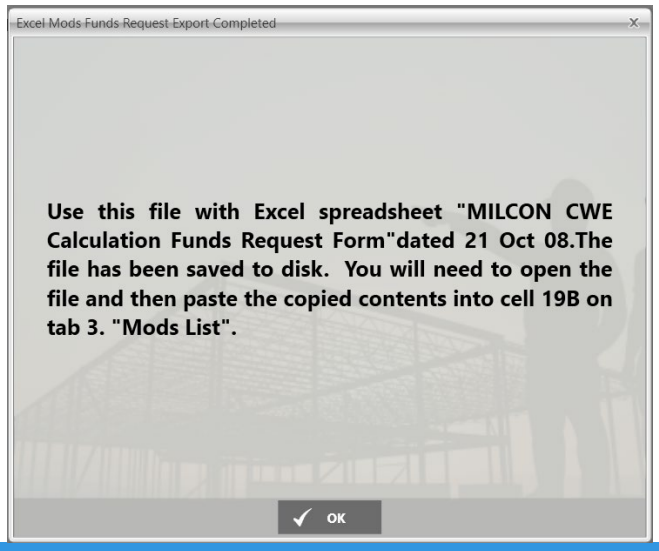
The ***Export Mods List*** module was designed to add the ability to export a list of all the modifications for the contract.



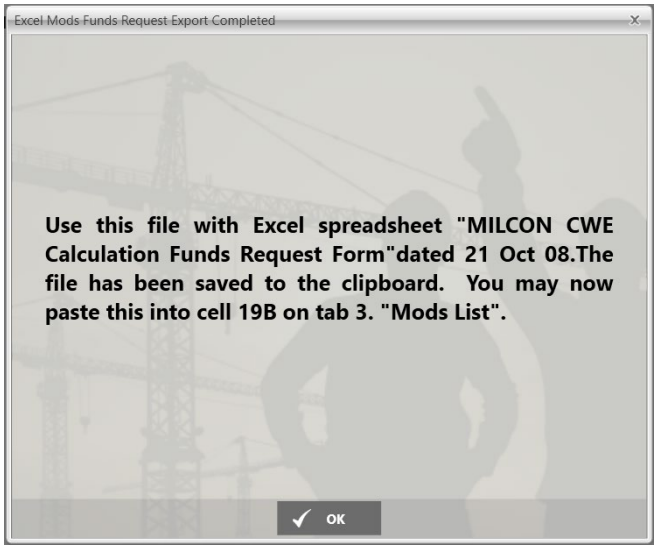
The export mods list only has two options: *Export to File* or *Export to Clipboard*:



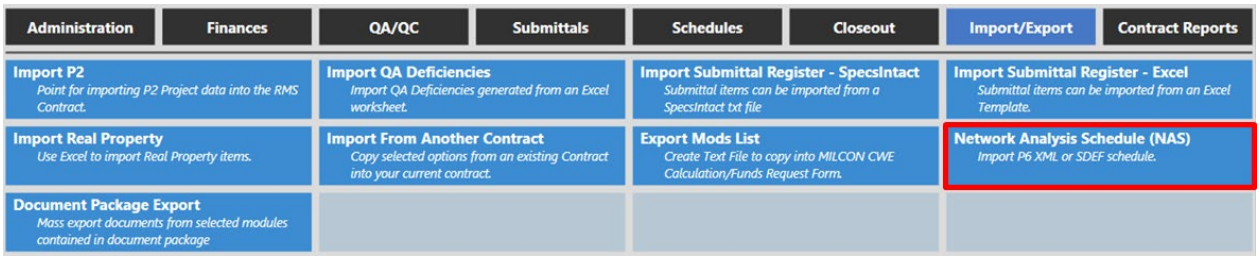
Executing the *Export to File* option will export the data in a standard text file (.txt). After clicking the button, a Windows Save As dialogue window will display for the user to confirm where the file should be saved and the file name. Remember the location of the saved file for later use. The notice below will appear with further guidance.



The *Export to Clipboard* option will copy the data to memory (as if the user were doing a copy/paste action) after which the user will need to open the desired document to paste the data into. The notice below will appear with further guidance.

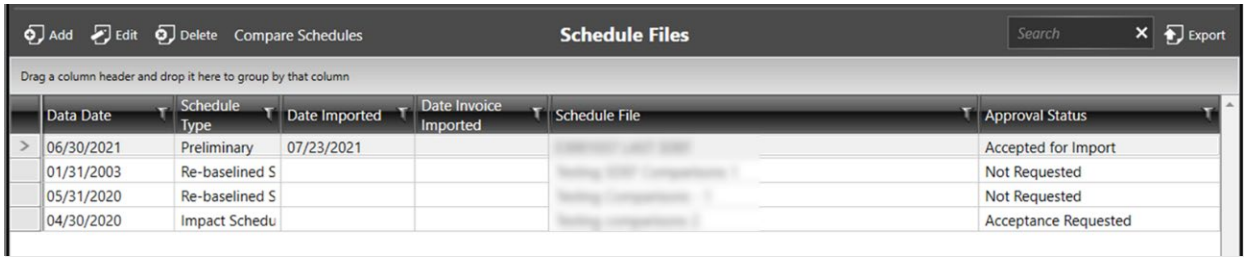


11.8 Network Analysis Schedule (NAS)

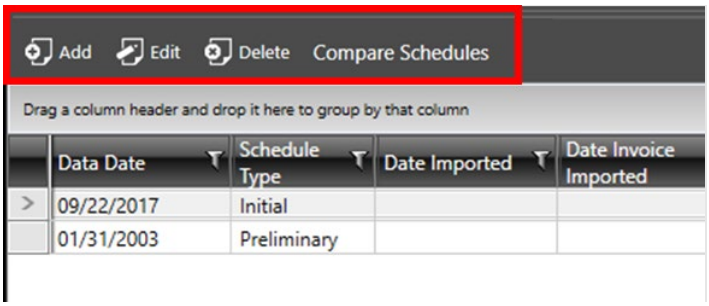


The ***Network Analysis Schedule (NAS)*** module was designed to be able to import Contractor schedule data as well as some financial data into RMS with the use of a Standard Data Exchange Format (SDEF) or an XML file created from P6.

The Schedule Files selection view lists all the schedule files previously uploaded to RMS. Each row displays a few columns of data for quick reference. The *Data Date* will show as indicated on the schedule file itself, *Schedule Type* is manually indicated when uploading the file, *Date Imported* created automatically when the file is originally imported, *Date Invoice Imported* when the financial data from the schedule was imported into an invoice, *Schedule File* is the file name and the *Approval Status*.



Navigating the ability to process the schedule and eventually import the data starts with the *Add*, *Edit*, and *Delete* buttons in the upper left-hand corner of the selection view:

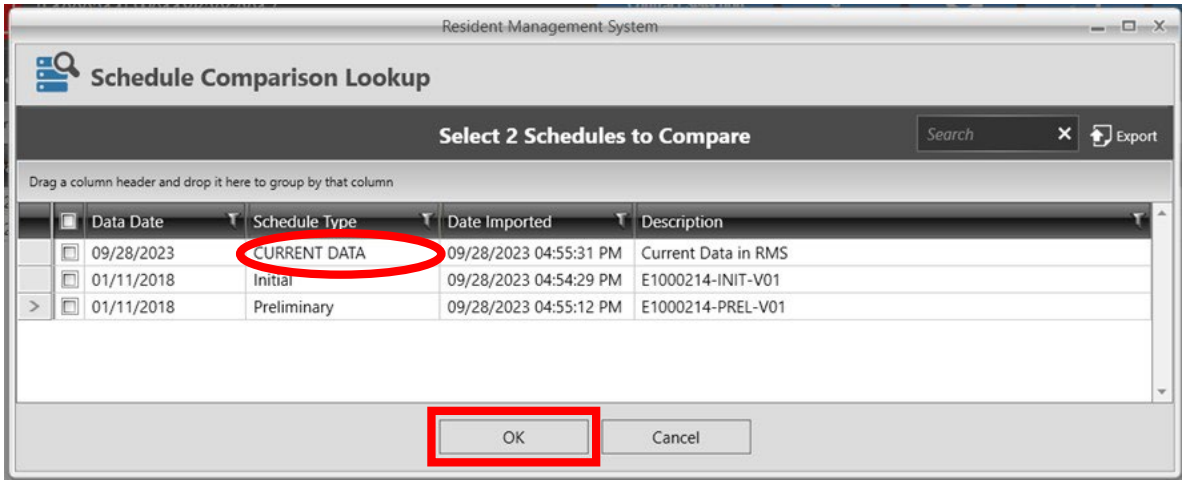


To edit a file that has been added select the line and click *Edit* to bring up the SDEF/XML Import File edit view. To delete a file, select the line and click the *Delete* button.

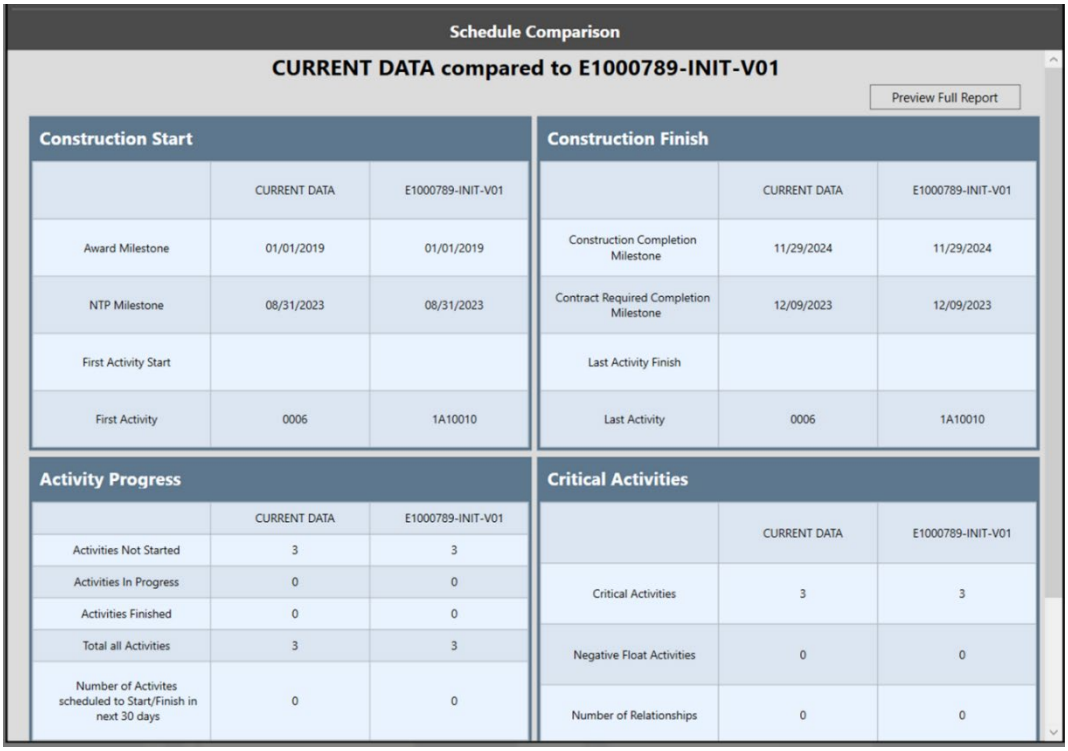
Note: If a file has been accepted for import, then the file cannot be deleted.

11.8.1 Comparing Schedules

The *Compare Schedules* button will allow the comparison of two schedules. Upon clicking the button, a lookup will be provided to select the schedules to compare. Only two schedules can be selected for comparison. Use the *CURRENT DATA* selection to compare current status data in RMS for the contract to a different schedule.



Below is a sample view of the *Schedule Comparison* screen.



Schedule Comparison

CURRENT DATA compared to E1000789-INIT-V01

Preview Full Report

Construction Start

	CURRENT DATA	E1000789-INIT-V01
Award Milestone	01/01/2019	01/01/2019
NTP Milestone	08/31/2023	08/31/2023
First Activity Start		
First Activity	0006	1A10010

Construction Finish

	CURRENT DATA	E1000789-INIT-V01
Construction Completion Milestone	11/29/2024	11/29/2024
Contract Required Completion Milestone	12/09/2023	12/09/2023
Last Activity Finish		
Last Activity	0006	1A10010

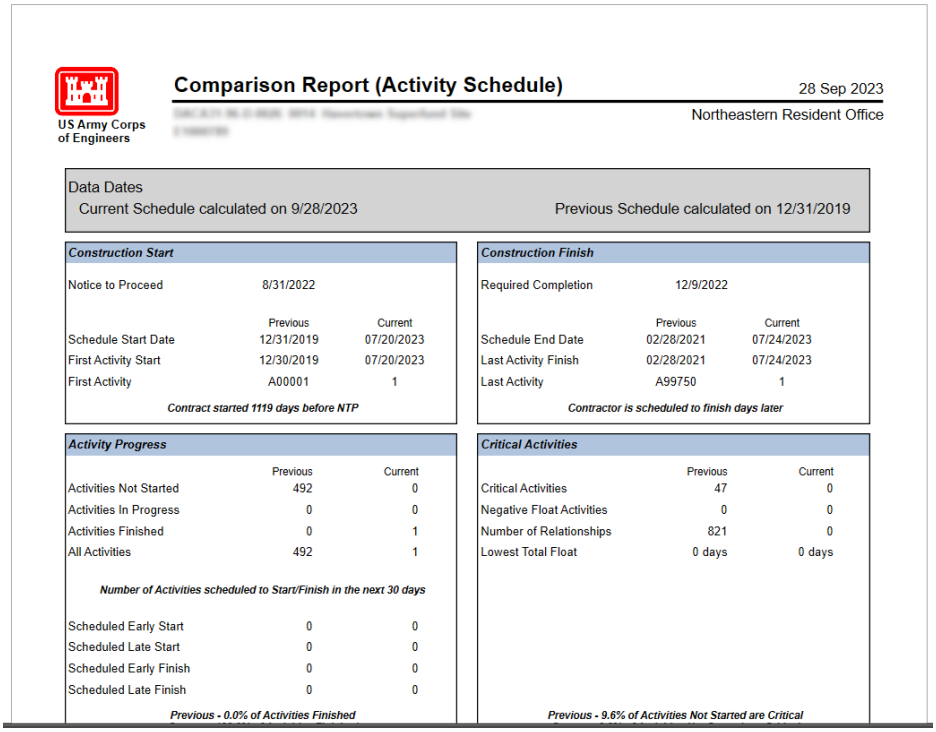
Activity Progress

	CURRENT DATA	E1000789-INIT-V01
Activities Not Started	3	3
Activities In Progress	0	0
Activities Finished	0	0
Total all Activities	3	3
Number of Activites scheduled to Start/Finish in next 30 days	0	0

Critical Activities

	CURRENT DATA	E1000789-INIT-V01
Critical Activities	3	3
Negative Float Activities	0	0
Number of Relationships	0	0

Click on *Preview Full Report* to generate the data in this screen into an Activity Schedule Comparison report.



US Army Corps of Engineers

Comparison Report (Activity Schedule) 28 Sep 2023

Northeastern Resident Office

Data Dates

Current Schedule calculated on 9/28/2023 — Previous Schedule calculated on 12/31/2019

Construction Start

Notice to Proceed 8/31/2022

	Previous	Current
Schedule Start Date	12/31/2019	07/20/2023
First Activity Start	12/30/2019	07/20/2023
First Activity	A00001	1

Contract started 1119 days before NTP

Construction Finish

Required Completion 12/9/2022

	Previous	Current
Schedule End Date	02/28/2021	07/24/2023
Last Activity Finish	02/28/2021	07/24/2023
Last Activity	A99750	1

Contractor is scheduled to finish days later

Activity Progress

	Previous	Current
Activities Not Started	492	0
Activities In Progress	0	0
Activities Finished	0	1
All Activities	492	1

Number of Activities scheduled to Start/Finish in the next 30 days

Scheduled Early Start	0	0
Scheduled Late Start	0	0
Scheduled Early Finish	0	0
Scheduled Late Finish	0	0

Previous - 0.0% of Activities Finished

Critical Activities

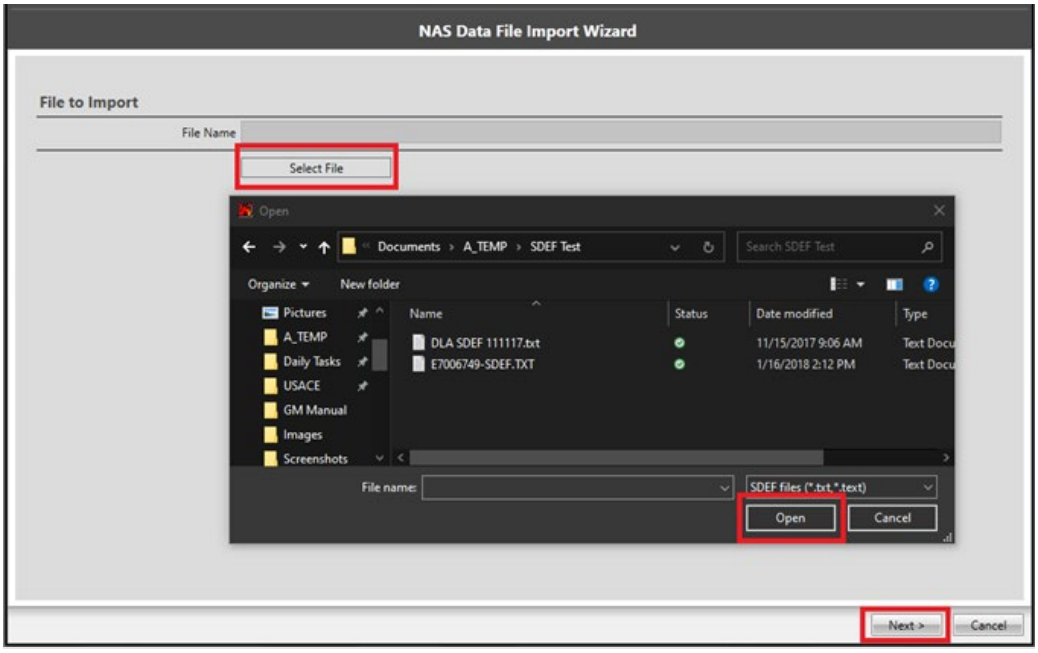
	Previous	Current
Critical Activities	47	0
Negative Float Activities	0	0
Number of Relationships	821	0
Lowest Total Float	0 days	0 days

Previous - 9.6% of Activities Not Started are Critical

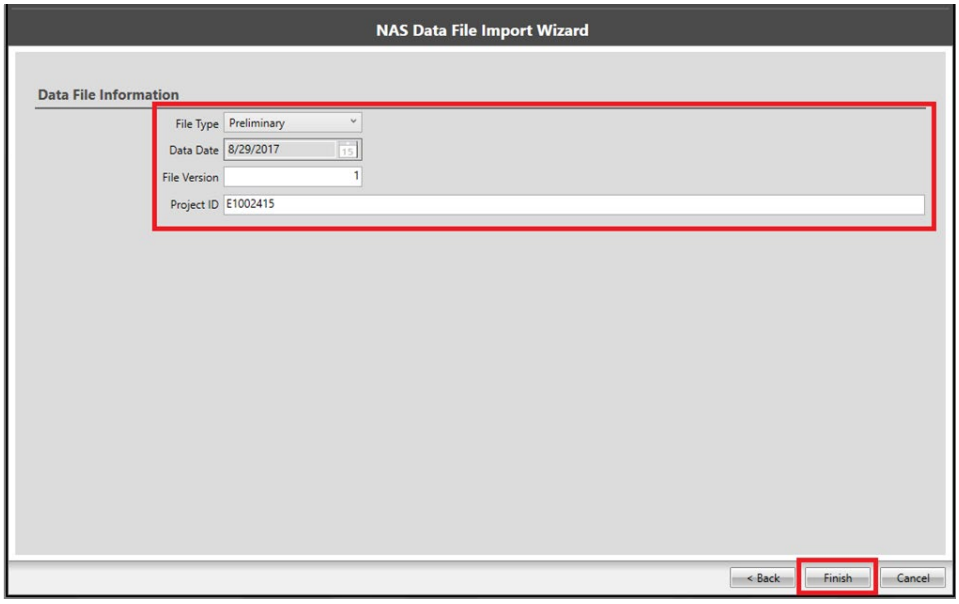
Note: Addition of a schedule file is usually completed by the Contractor. However, the instructions for that process are listed here for reference.

11.8.2 Adding Schedules

Clicking the *Add* button initiates the NAS Data File Import Wizard. From the add view, click the *Select File* button to initiate the Windows *Open* dialogue and locate the schedule file. After locating the file click *Open,* and then click *Next* in the bottom right-hand corner of the add view.



After clicking *Next*, information about the file is requested. The *File Type* is either preliminary, initial, impact schedule, re-baselined schedule, monthly update, recovery schedule or completion schedule. The *Data Date* is filled automatically with information extracted from the file. The *File Version* is a subjective numbering system as determined by the contract as is the *Project ID*. After the file information is completed click *Finish* in the bottom right-hand corner of the view.



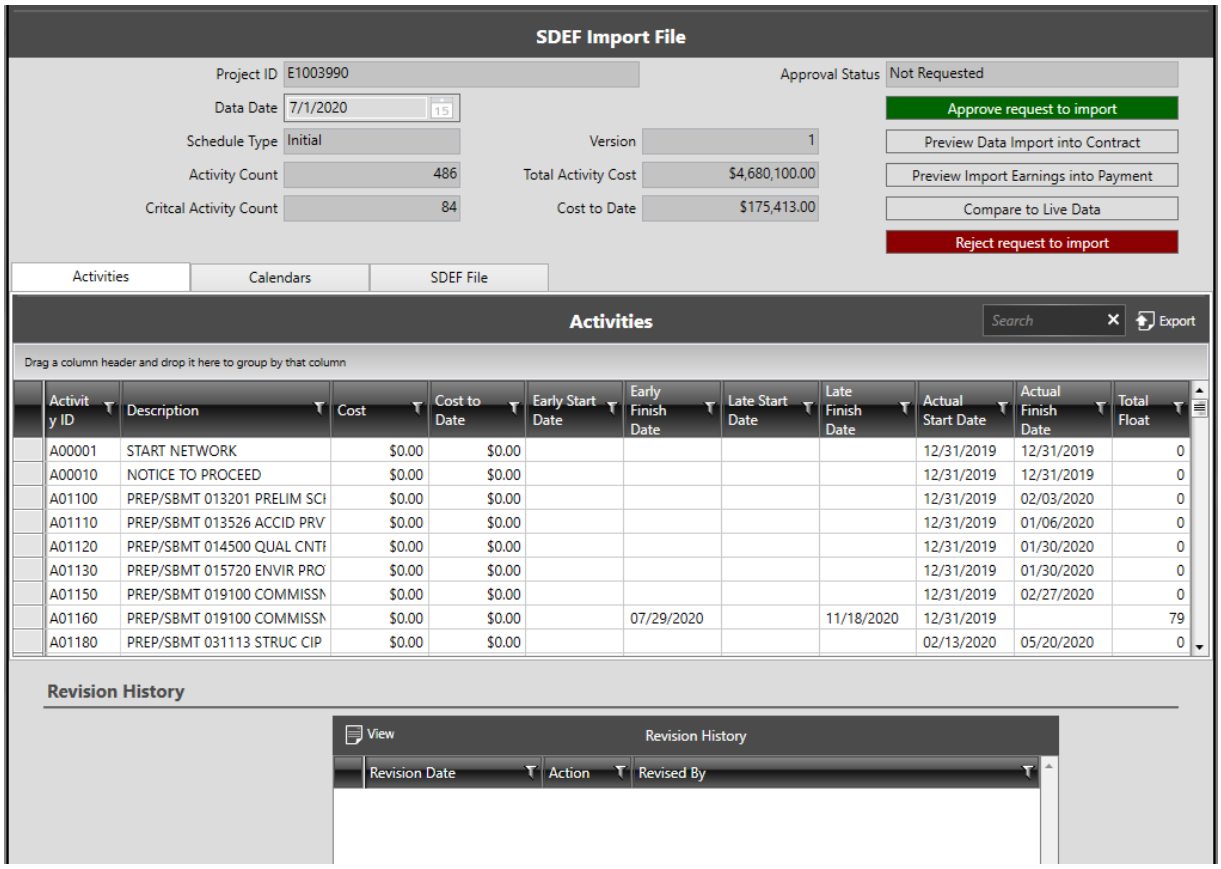
Once the *Finish* button is clicked, RMS will open the edit view.

11.8.3 Deleting Schedules

The Government can delete any file schedule by selecting the schedule and clicking on the *Delete* button at any time. However, the Contractor *cannot* delete any schedule that has been Requested for Acceptance, Accepted, or Rejected by the Government.

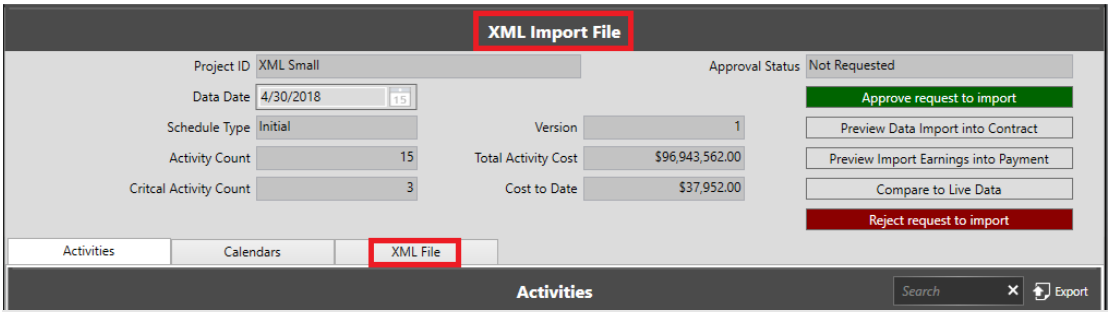
11.8.4 Editing/Reviewing Schedules

For existing SDEF files, to view the edit view of the SDEF/XML file, simply select an SDEF/XML file on the selection view and click the *Edit* button or simply double click on the file itself. Once opened, the user will be presented with a view similar to the image below.

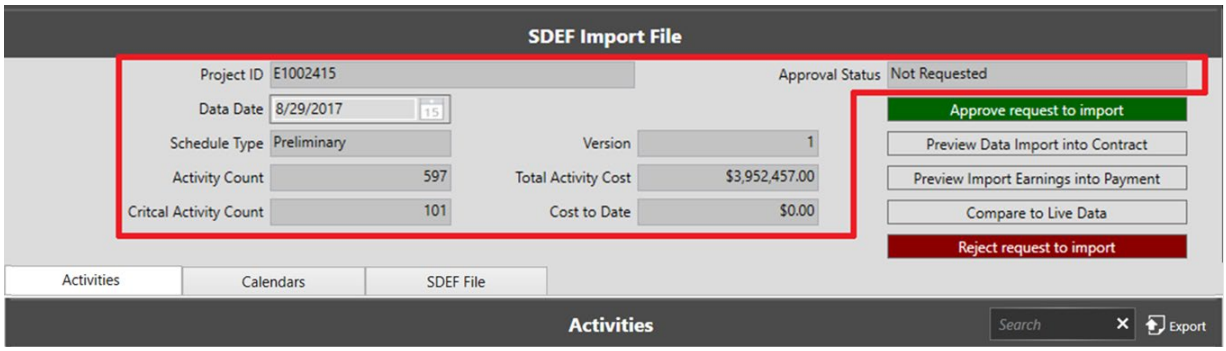


Note: The *Revision History* table will capture revision entries for submission (Submit), acceptance to import (Accept), and/or rejection of the import (Return) only. The revision entries recorded here **will not** capture whether the data was imported into the contract.

If importing an XML file, the final tab will display XML and the title will include “XML” to indicate the type of file being imported, as seen below.



The top of the edit view for both contains general information about the file including information that was entered during the add process.

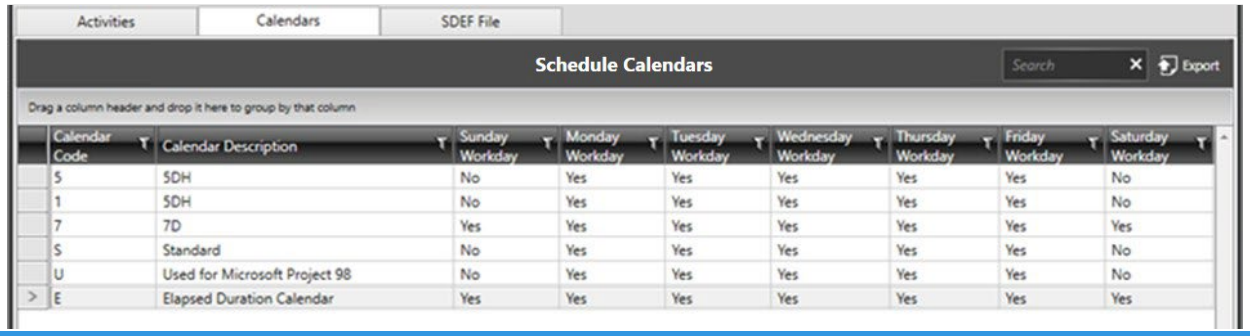


The invoice earnings preview may not make sense if the current activities in RMS do not match those in the schedule file; therefore, the Contractor should perform the *Import data into Contract* action prior to performing *Import into Invoice* action.

The bottom half of the view displays three tabs. The ***Activities*** tab is a list of activities included with the file.

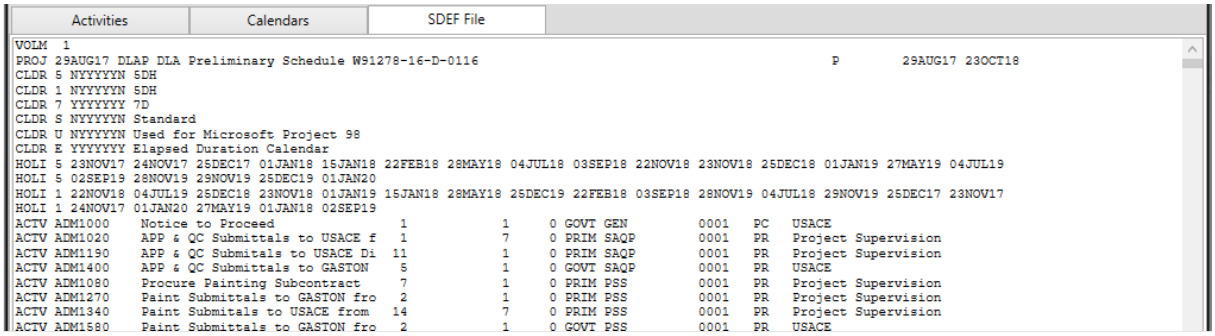
Activity ID	Description	Cost	Cost to Date	Early Start Date	Early Finish Date	Late Start Date	Late Finish Date	Actual Start Date	Actual Finish Date	Total Float
ADM1000	Notice to Proceed	$0.00	$0.00	08/29/2017	08/29/2017	08/29/2017	08/29/2017			0
ADM1020	APP & QC Submittals to USACE	$0.00	$0.00	08/30/2017	08/30/2017	10/25/2017	10/25/2017			56
ADM1190	APP & QC Submitals to USACE [	$0.00	$0.00	08/31/2017	09/14/2017	10/26/2017	11/09/2017			40
ADM1400	APP & QC Submittals to GASTO	$0.00	$0.00	09/15/2017	09/21/2017	11/10/2017	11/16/2017			40
ADM1080	Procure Painting Subcontract	$0.00	$0.00	08/30/2017	09/07/2017	09/06/2018	09/14/2018			257
ADM1270	Paint Submittals to GASTON fro	$0.00	$0.00	09/08/2017	09/11/2017	09/17/2018	09/18/2018			257
ADM1340	Paint Submitals to USACE from	$0.00	$0.00	09/12/2017	09/25/2017	09/19/2018	10/02/2018			372

Calendars is the second tab.

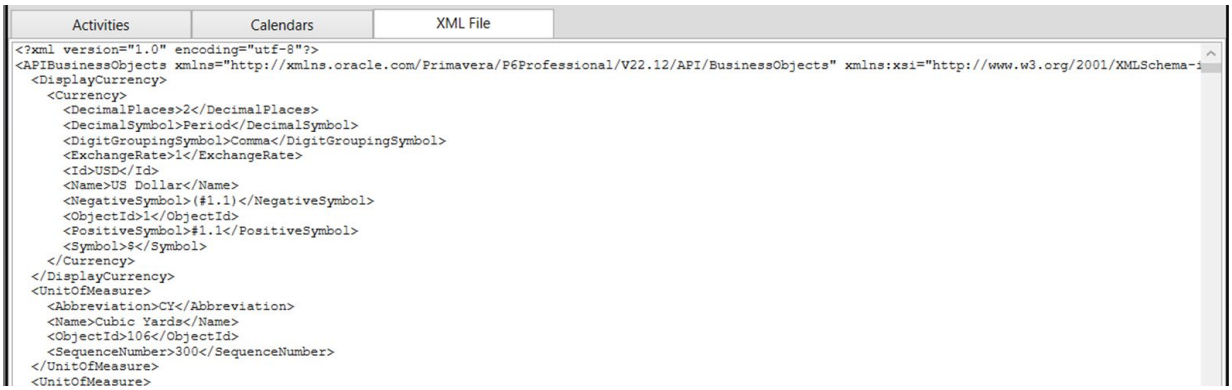


Calendar Code	Calendar Description	Sunday Workday	Monday Workday	Tuesday Workday	Wednesday Workday	Thursday Workday	Friday Workday	Saturday Workday
S	SDH	No	Yes	Yes	Yes	Yes	Yes	No
1	SDH	No	Yes	Yes	Yes	Yes	Yes	No
7	7D	Yes	Yes	Yes	Yes	Yes	Yes	Yes
S	Standard	No	Yes	Yes	Yes	Yes	Yes	No
U	Used for Microsoft Project 98	No	Yes	Yes	Yes	Yes	Yes	No
E	Elapsed Duration Calendar	Yes	Yes	Yes	Yes	Yes	Yes	Yes

If using an SDEF file, the original data is displayed on the third ***SDEF File*** tab.



If using an XML file, the original data is displayed on the third ***XML File*** tab.



In the upper right-hand corner of the edit view are the button actions for the schedule file.

Approve Request to Import will approve the schedule and enable the Contractor to be able to import the data.

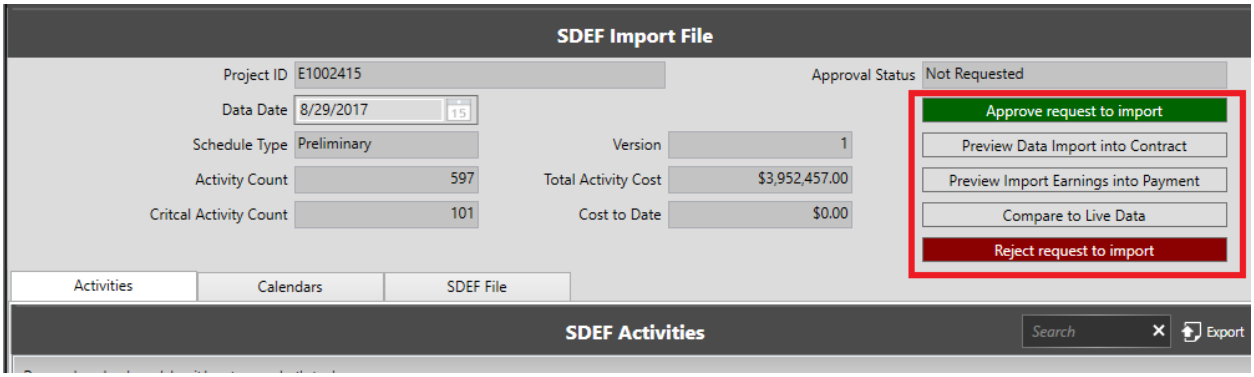
Note: Only one schedule may be approved for import at a time.

Preview Data Import into Contract (explained further below) opens the Activity Import Preview view to preview the data prior to importing it into the contract.

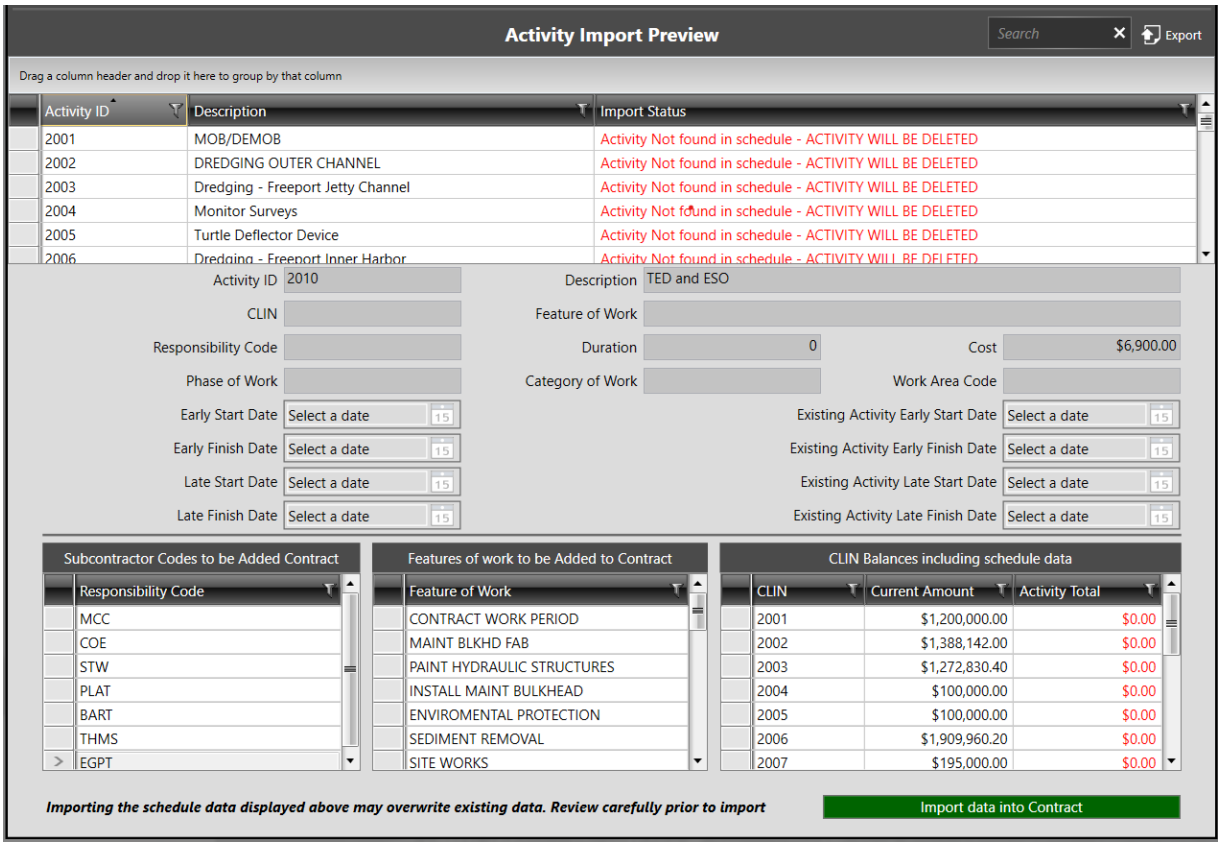
Preview Import Earnings into Payment: Under certain conditions, this displays a preview of financial information extracted from the schedule and imported into the latest progress payment/invoice.

Compare to Live Data is still under development.

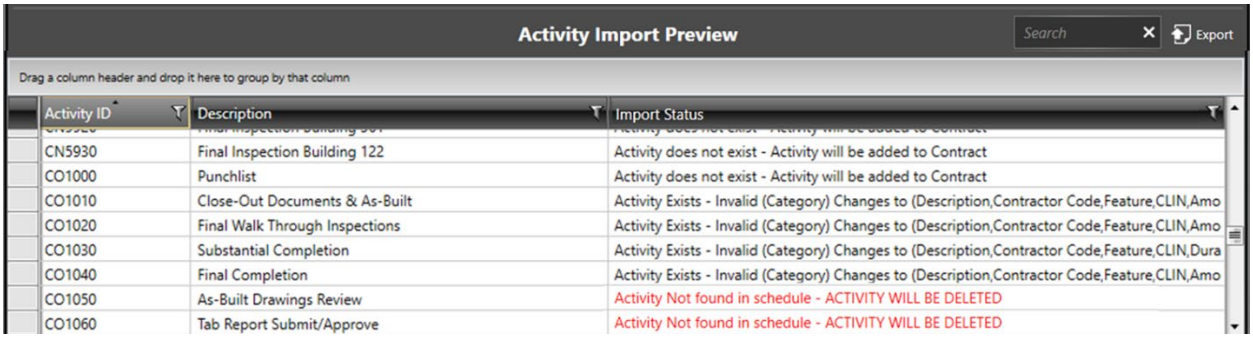
Reject request to import will prevent the Contractor from being able to import the schedule file.



Preview Data Import into Contract provides just that, a preview of how the data being imported from the schedule will affect the data that currently exists in the contract. Keep in mind the data portrayed in the example images is test data and is not information taken from an active contract.

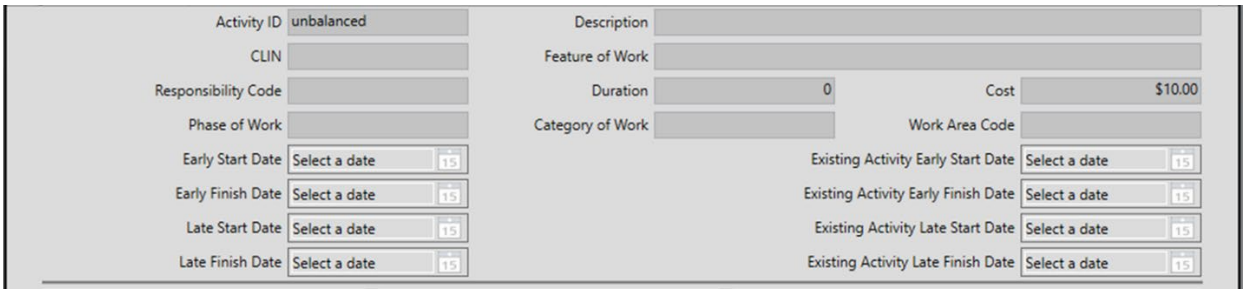


At the top of the view is a grid displaying the *Activity ID*, *Description* of the activity, and *Import Status* of the activity. Most important is the *Import Status*, which provides an important but brief indication of how the activities will be treated; for example, Activity Not Found in schedule – ACTIVITY WILL BE DELETED. If any Activity ID that exists in the contract but does not have a matching Activity ID on the schedule, the existing activity in the contract will be deleted. However, if an Activity ID exists on the schedule and not in the contract, the activity will be added to the contract.



If an Activity ID in the contract has a match that exists in the schedule, but the data associated with that existing activity are different than what is on the schedule the import status adds a brief description of what will change as a result of importing the current schedule. The keyword,

"Invalid" is used when data on the schedule does not match any of the data set options available in the contract and the schedule data will be ignored.

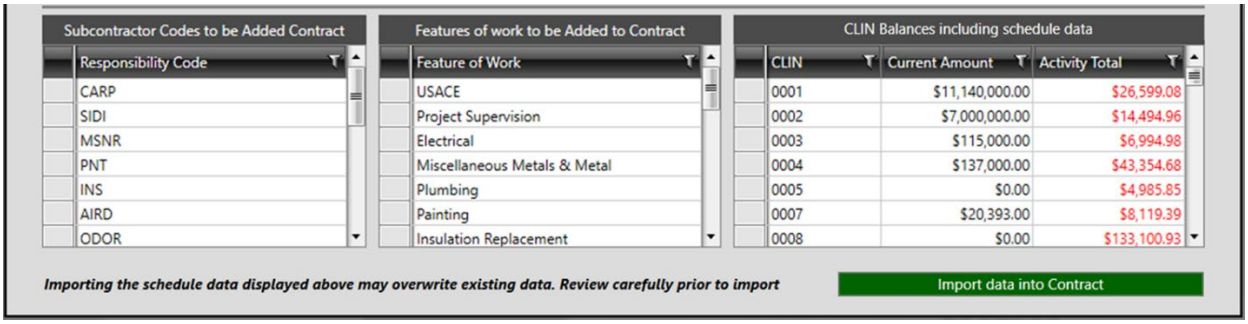


The middle section of the data preview displays a read-only view of the information associated with the pay activity that was extracted from the schedule. By highlighting any row of any of an activity in the grid above, the information will change to reflect information specifically for that item selected. This section provides additional information not available in the grid:

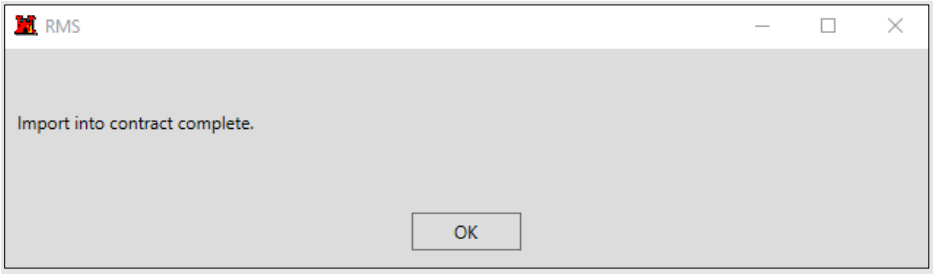
The third section of the data preview at the bottom contains additional information about the data contained within the schedule. This includes *Subcontractor Codes to Be Added To The Contract*, *Features Of Work To Be Added To The Contract*, and a grid of *CLIN Balances Including Schedule Data* which compares the current CLIN balance to the sum of the total schedule activities linked to the CLINs. This is a valuable tool to quickly determine if the CLIN total(s) and activity totals will be balanced or unbalanced after import (red indicates an unbalanced).

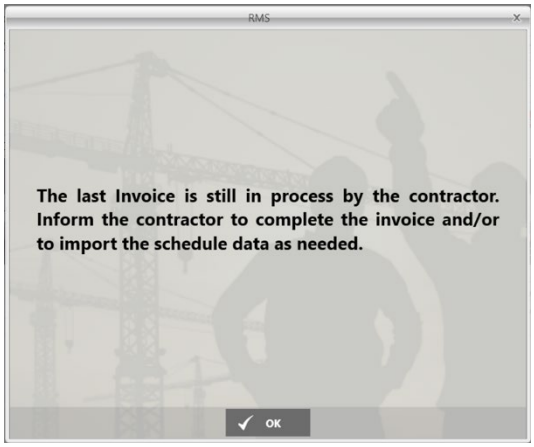
Finally, the *Import data into Contract* button in the bottom right-hand corner will execute the import process. A window will appear with a warning that the import may overwrite exiting data. To continue, click *Yes*, and to go back, click *No*.

> *Note*: It is the responsibility of the Contractor to import the data into the contract after the Government has approved the schedule for import.



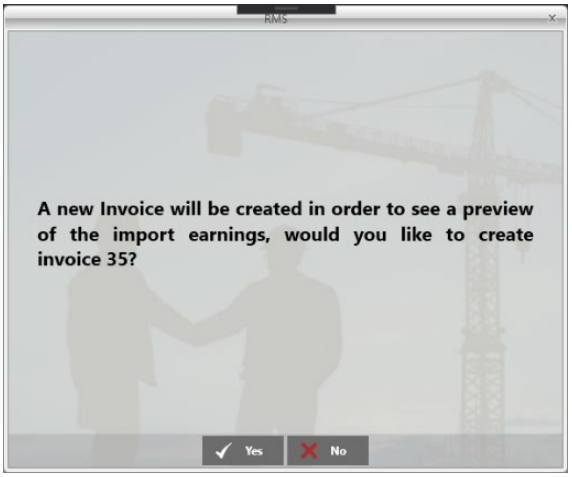
When the import process is complete, an alert will be displayed:





To execute the *Preview Import Earnings into Payment* button, the Contractor must not have a Progress Payment that has yet to be submitted. Attempting to do so will result in an alert that states the existing invoice must be completed and submitted to the Government before utilizing this function (figure on left).

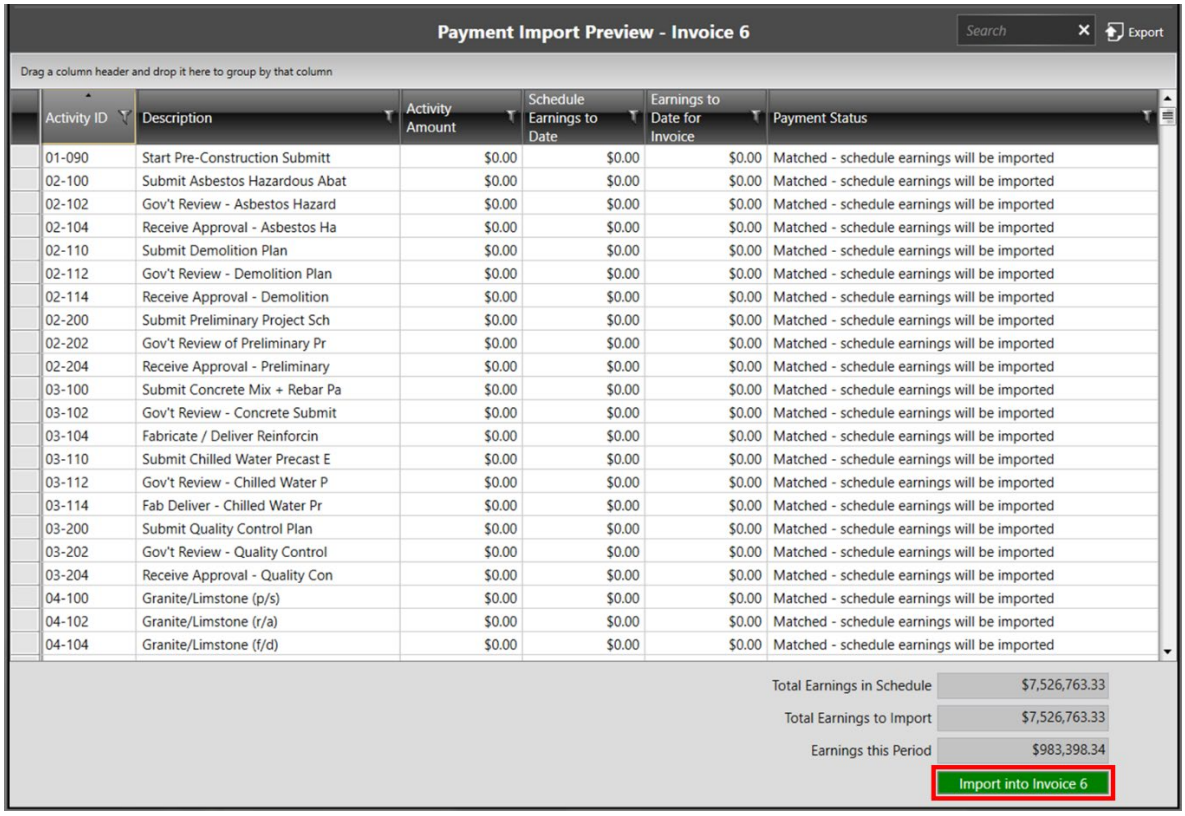
If no invoices are currently in progress, then a warning (figure below) will display before being able to preview the earnings import view, as seen in the figure on the right. This is to ensure that the user completing this action is aware that doing so will create a new progress payment.



Note: Creating a new progress payment is required in order to view how the earnings will be affected by the importation of the schedule.

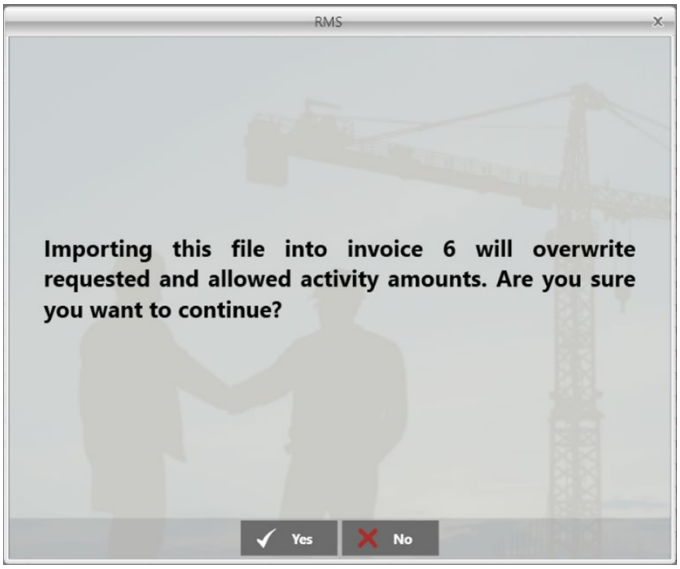
When clicking on *Preview Import Earnings Into Contract*, RMS will create a new payment as long as the last payment has been accepted in CEFMS.

Clicking *No* will not take any action and the user will remain on the current view. Clicking *Yes* and continuing will display the *Payment Import Preview*:

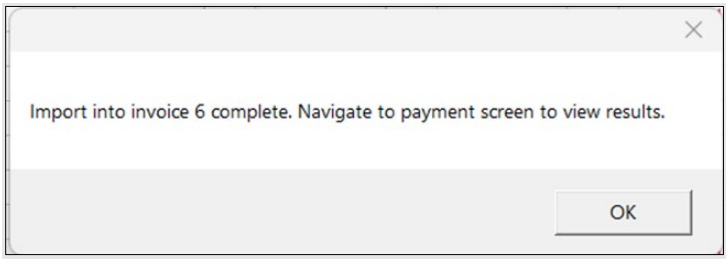


For each activity row in the grid, RMS provides useful information. However, most important is the *Payment Status* column which indicates how the data will be treated. It is important to note that only the earnings of matching pay activities will be imported. The rest will be ignored. When reviewing is complete, users can either click the *Back* button to back out of the preview or click the *Import into Invoice #* button on the bottom right-hand corner of the view to import the earnings data as indicated on the preview into the invoice number indicated on the button. A window to confirm the import will appear. To complete the import, click *Yes* and to return back to the *Payment Import Preview*, click *No*.

Note: It is the responibility of the Contractor to import the earnings into the contract.



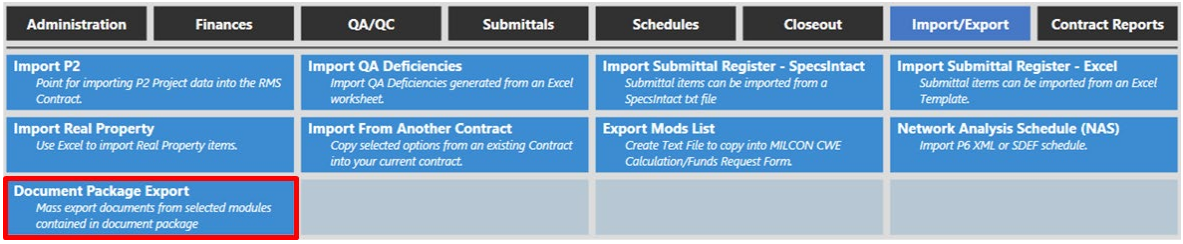
When complete, an alert will be displayed instructing the user to access the invoice in progress payments.



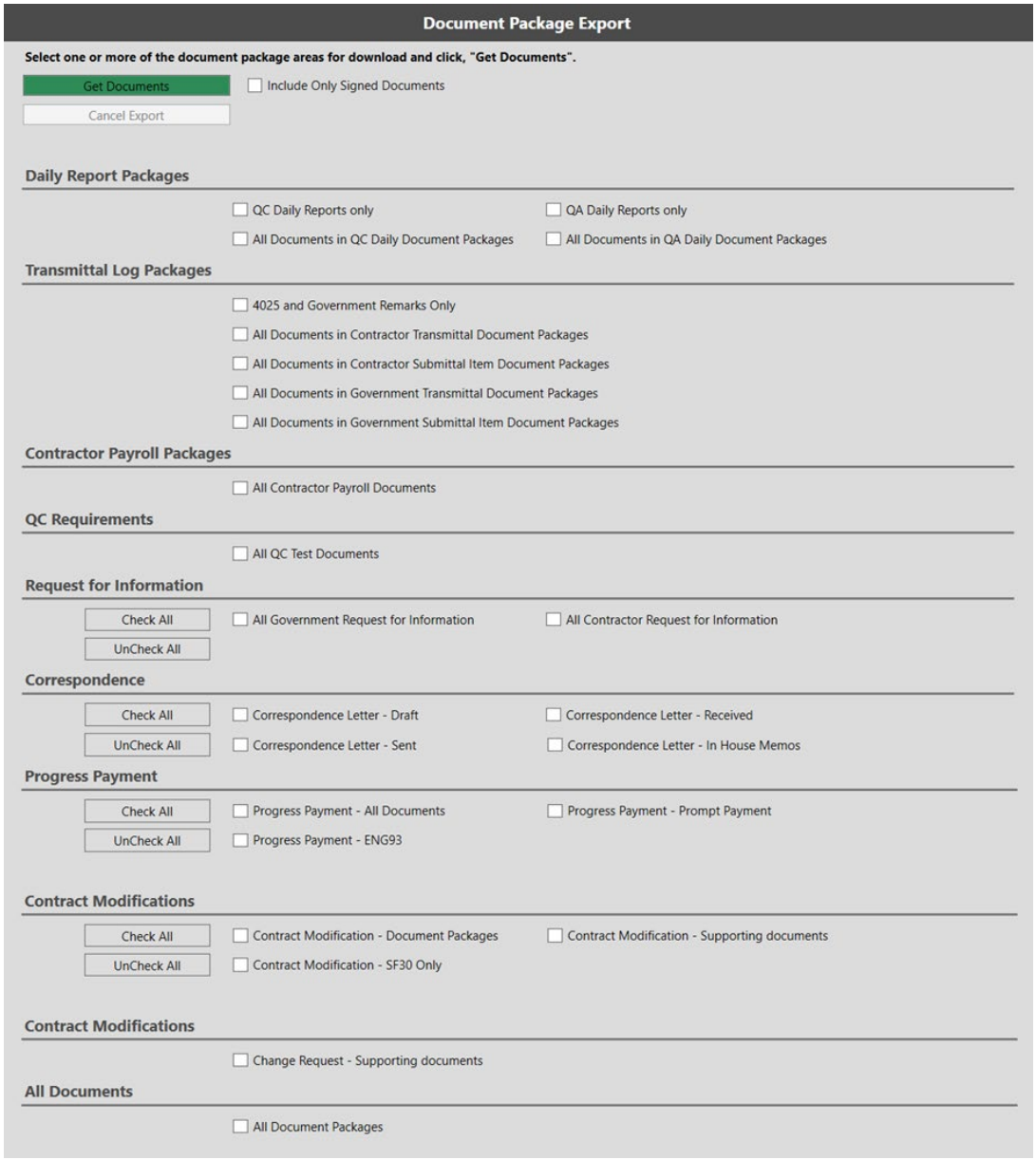
Note: It is the responsibility of the Contractor to import into the invoice after the Government has approved the schedule for import.

Administration | Contract Notification Control can be used to help inform both the Government and Contractor about the status of schedule submission and approval.

11.9 Document Package Export

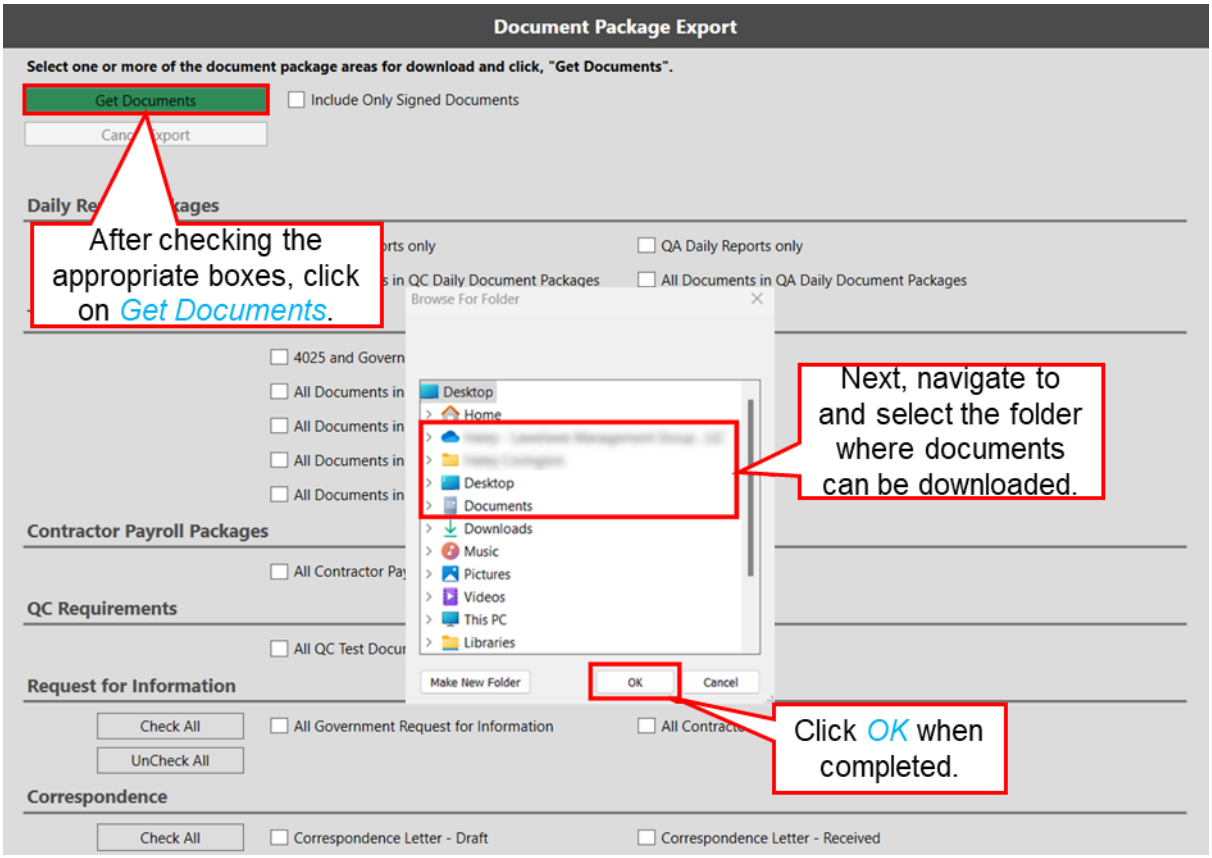


The ***Document Package Export*** module provides the ability to export documents from various Document Packages throughout RMS.

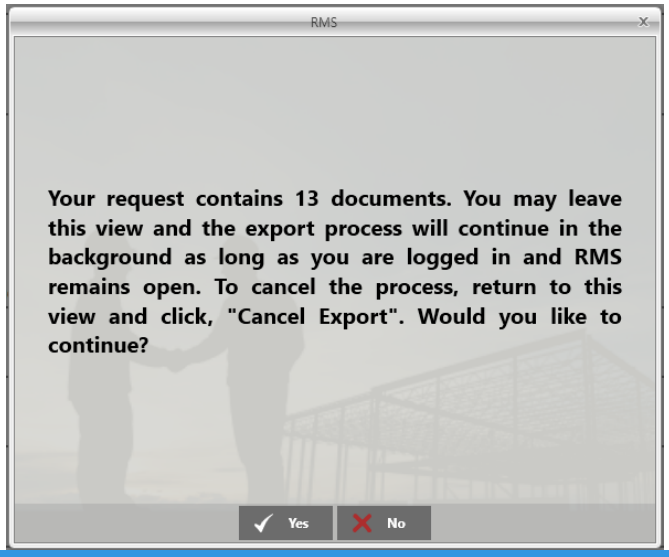


When exporting documents, check the *Include Signed Documents Only* checkbox to exclude any documents that have not been signed.

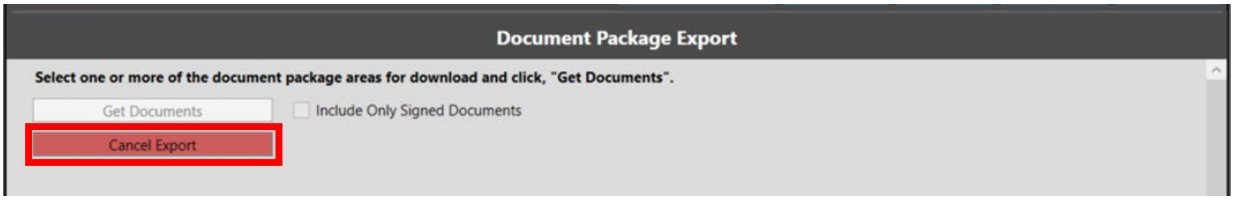
After selecting some options, others will become read-only. For example, selecting *All Documents in QA Daily Document Packages* will make *QA Daily Reports only* read-only since the option to export all documents will include the QA daily reports. The same is true for *All Documents in Contractor Transmittal Document Packages* and *4025 and Government Remarks Only* since the 4025 form and Government remarks will be included in all Contractor Document Packages.



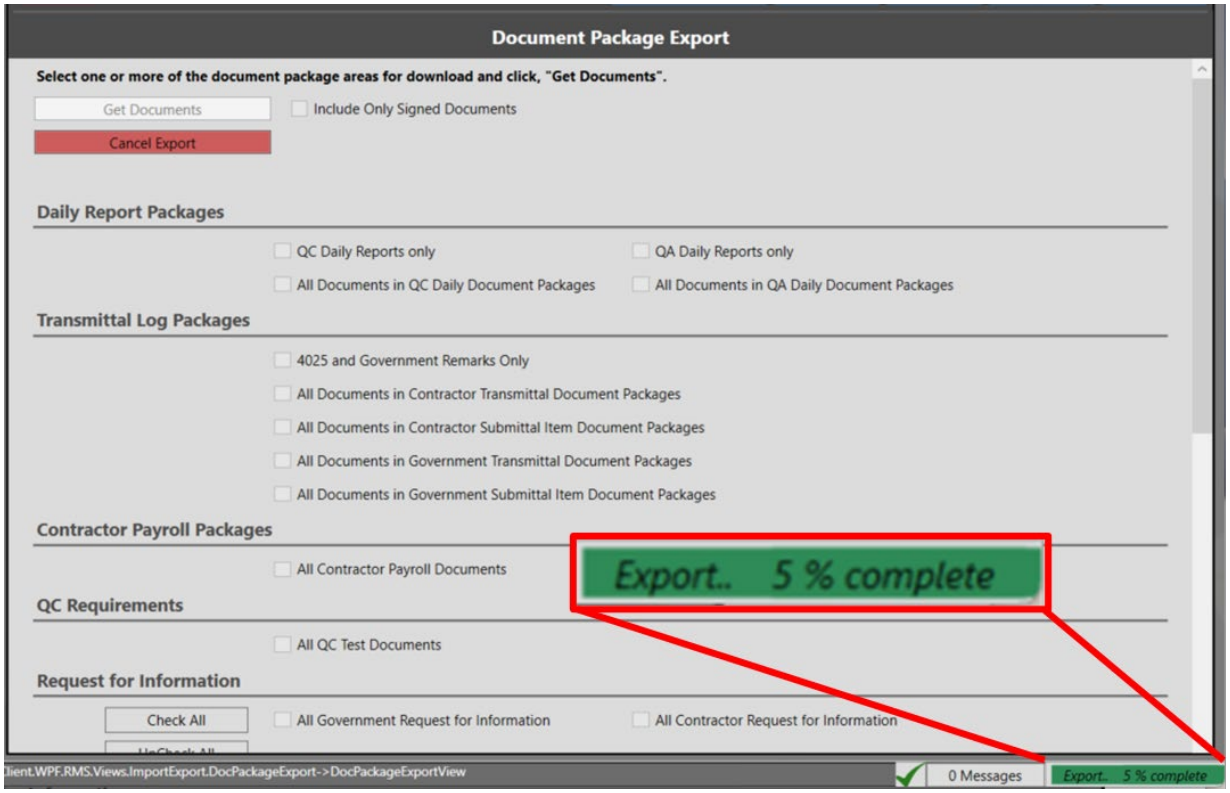
When the desired selections have been made, click the *Get Documents* button to select a folder where the documents will download. A prompt will appear stating how many documents will be downloaded. Click *Yes* to proceed with the download.



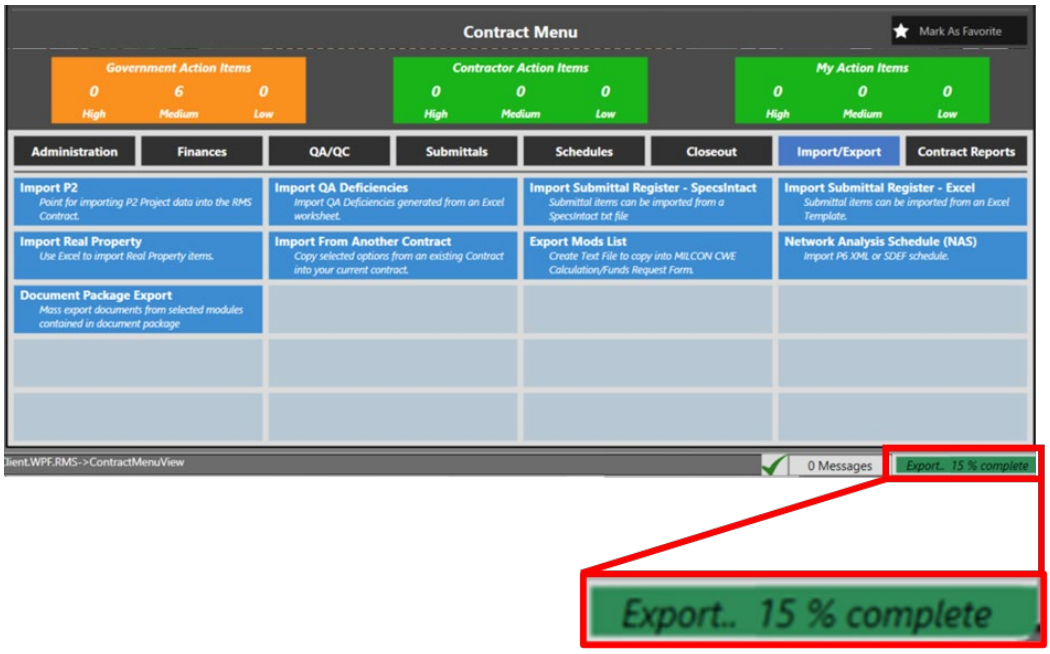
While an export is in progress, the *Cancel Export* button will become active.



The progress of the export will be displayed in the bottom right corner of the RMS application screen.

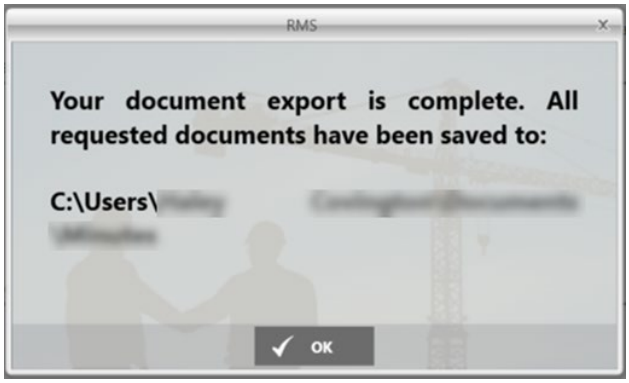


This progress bar will continue to display until the export has completed, even if users navigate away from the ***Document Package Export*** module. The exception is if RMS is closed, then the download will stop at the time RMS is shutdown.



If after selecting the folder, the data chosen contains enough data that there is a waiting period for the process to complete, a busy indicator will display. Depending on the speed, stability of the internet connection and number and size of items requested, the export could take an extended period of time:

When the download has completed, an alert will display indicating where the files are located if the Document Packages selected contained any documents.

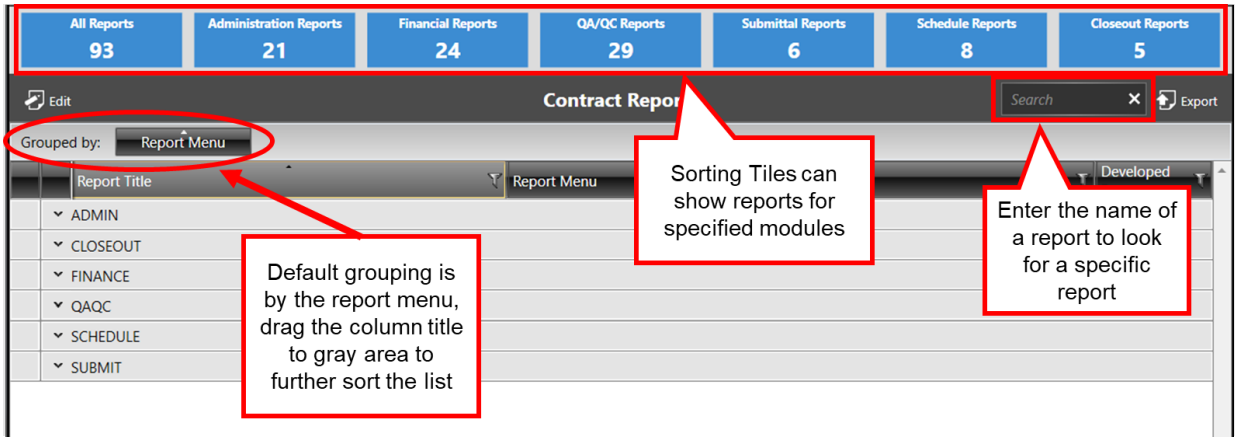


12.0 CONTRACT REPORTS

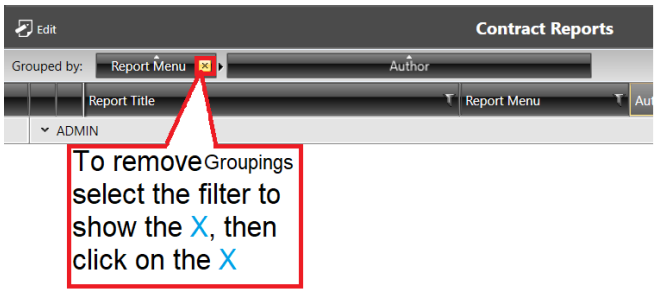
This is where users can view reports to get an at a glance view of the contract, as well as reports to compare data, review data, and determine status of the contract without going into each individual module. Unlike the other submenu tabs, ***Contract Reports*** opens a selection grid of reports available for the contract.

12.1 Sorting and Viewing Reports

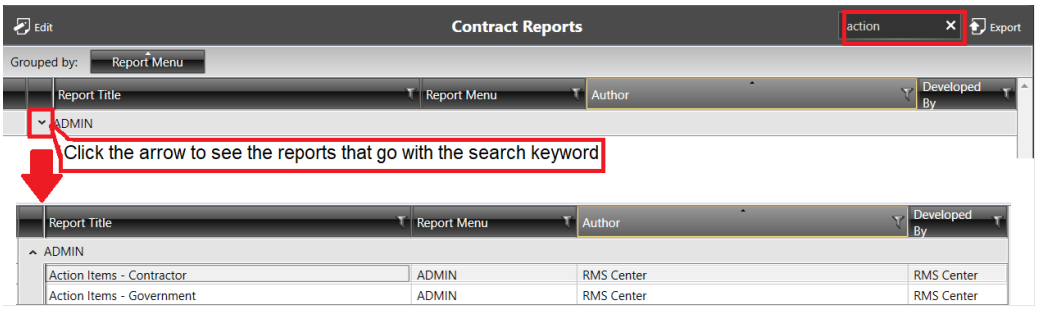
By default, the reports are grouped by the Report Menu category. These categories are similar to the submenus, and the reports generally relate to the modules found in each of those submenus. Clicking one of the filter tiles at the top of the selection grid will cause the grid to only display reports from that category. Remove the grouping by clicking the 'X' next to the grouped column name. To view the reports in a particular group, click the down arrow next to the group name to expand the list.



By default, the reports are sorted by Report Title, both with and without grouping. To add a grouping, click on a column title and drag it to the gray bar that says *Group By*. To remove a grouping, select it to show the *X* button, then click on the *X*.



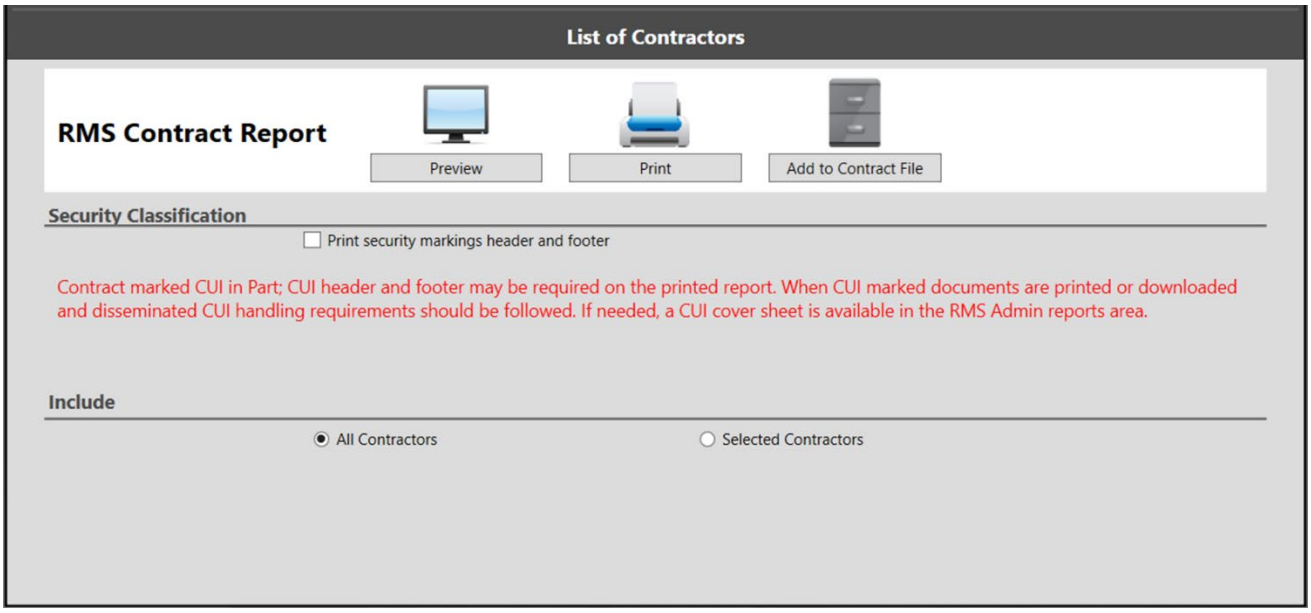
Note: If using the search box to find reports, users will need to click on the dropdown arrows next to the grouped by field to see the report.



To change the sort column, click on the title of the column once to sort ascending or twice for descending. To open a report, select the report from the list and click *Edit*; or double-click the report name in the list.

12.2 Generating Reports

Most reports present a screen for selecting parameters, and some will have Sort options. For those reports that have parameters and Sort options, make the desired selections before opting to preview the report before printing (Preview), send the report directly to a printer (Print), or add the report to the Contract File for submission to PCF (Add to Contract File). An example of a report parameters screen is provided below.

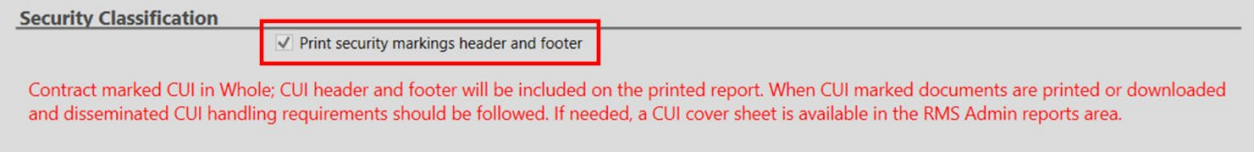


Some report parameters will have multiple inclusive options; use the *Check All* and *Uncheck All* buttons for ease of use, if applicable.

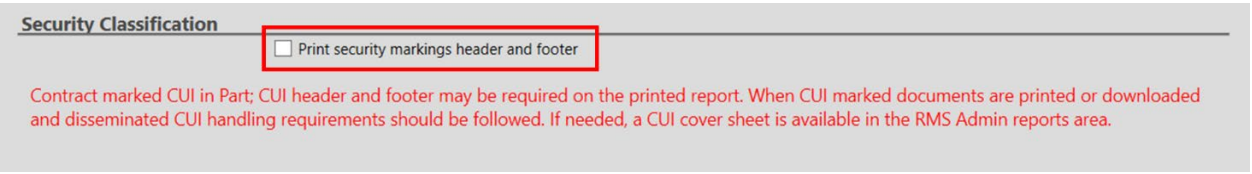
12.2.1 Security Classification

The *Print security markings header and footer* checkbox can be used to add security markings to a report, if required.

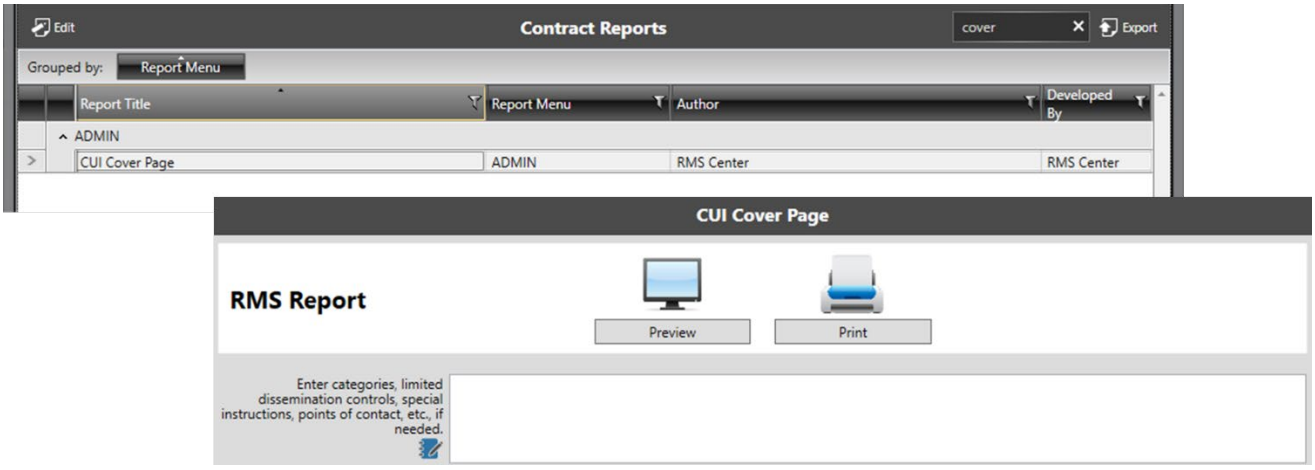
For contracts that are marked CUI as a Whole, all Contract Reports will be printed with the CUI header and footer. The *Print security markings header and footer* checkbox will be disabled, and the report will include the security markings entered in Contract Setup for the contract.

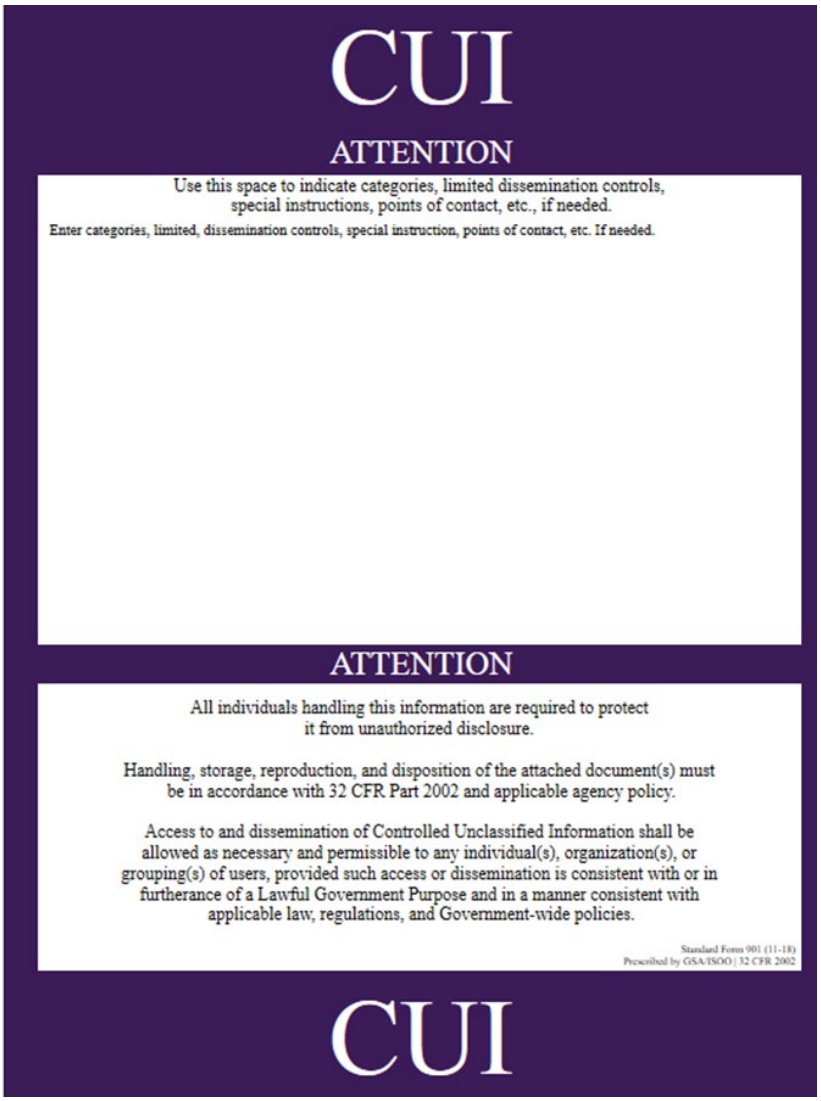


For contracts that are marked CUI In Part, all Contract Reports have the *option* to be printed with the CUI header and footer. The *Print security markings header and footer* checkbox will be editable, and if selected, the report will include the security markings entered in Contract Setup for the contract.



Note: A CUI cover page is available for use if required by the contract in the ***Contract Reports*** module. Enter categories, limited dissemination controls, special instructions, points of contact, etc., if needed, in the textbox provided.





Those reports that do not have any parameters or sort options will go directly to a report preview, from which the report can be printed or exported.

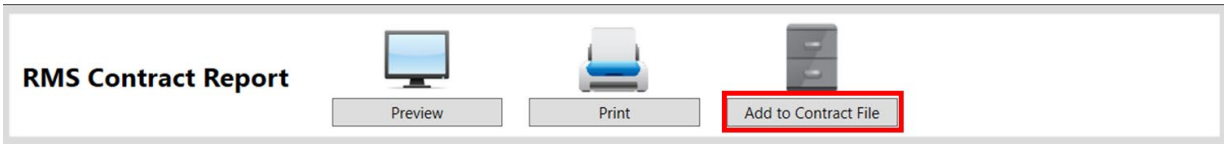
If *Add to Contract File* is selected, the report will be shown in a preview window so it can be reviewed before being sent to PCF. Click the *Add to Contract File* button to include the report in the Contract File and have it sent to PCF.

US Army Corps of Engineers

List of Contractors 27 Mar 2024

CONTRACT-NUMBER DELIVERY-ORDER-NO Transmittal Training Jenn's Training Office

E1002638



User will then be prompted for confirmation of selection.

If confirmed, RMS will display a loading screen until the report has been transferred. At which point a confirmation window will appear to inform the user that the report was added to the Contract File. If not, then the user will be returned to the report preview window.

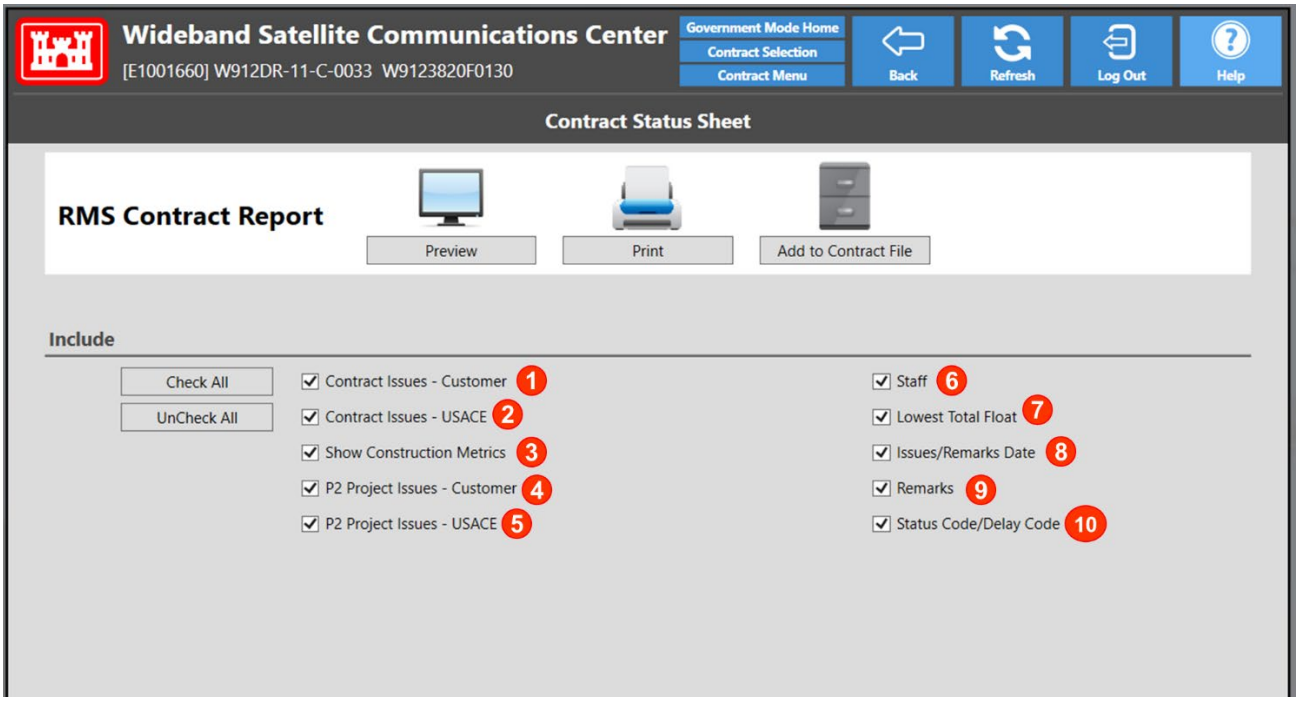
If the report has a predefined container in PCF, it will be put in the appropriate folder in Contract File; otherwise, it will be put in the Other contract Documents subfolder of the contract Administration folder.

12.3 Exporting Reports

To export a report, first *Preview* the report. In the preview window, select Save and the desired export file type.

12.4 An Example of How Data Populates for Reports – Contract Status Sheet

In this section, the contract's Contract Status Sheet report will be used to describe where data comes from and how data populates to the report. When the report is first opened, users are presented with a couple of different options to choose to view on the report.



1 – *Contract Issues - Customer*

2 – *Contract Issues - USACE*

3 – *Show Construction Metrics*

4 – *P2 Project Issues - Customer*

5 – *P2 Project Issues - USACE*

6 – *Staff*

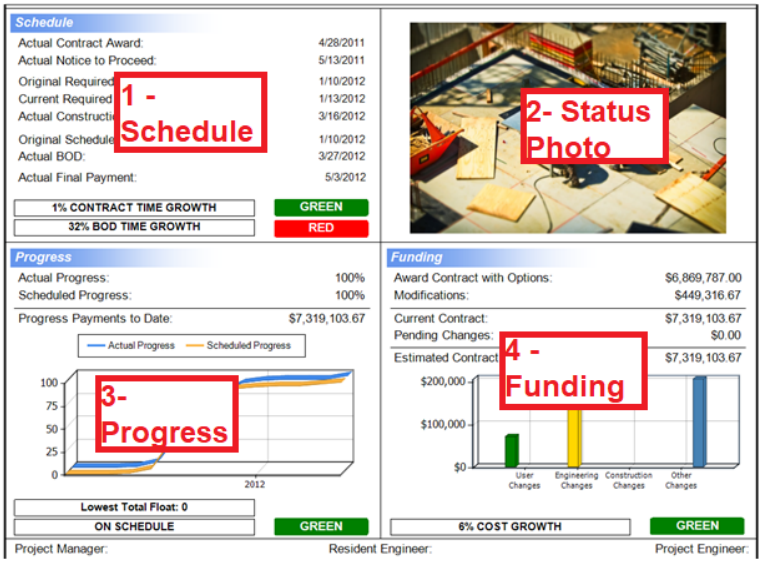
7 – *Lowest Total Float*

8 – *Issues/Remarks Date*

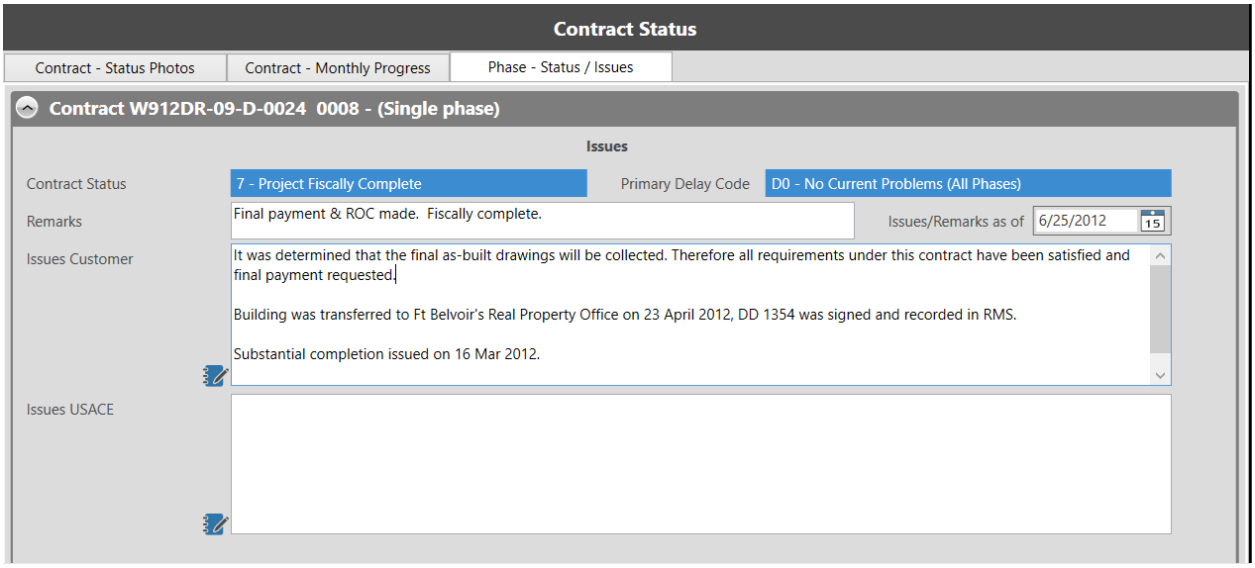
9 – *Remarks*

10 – *Status Code/Delay Code*

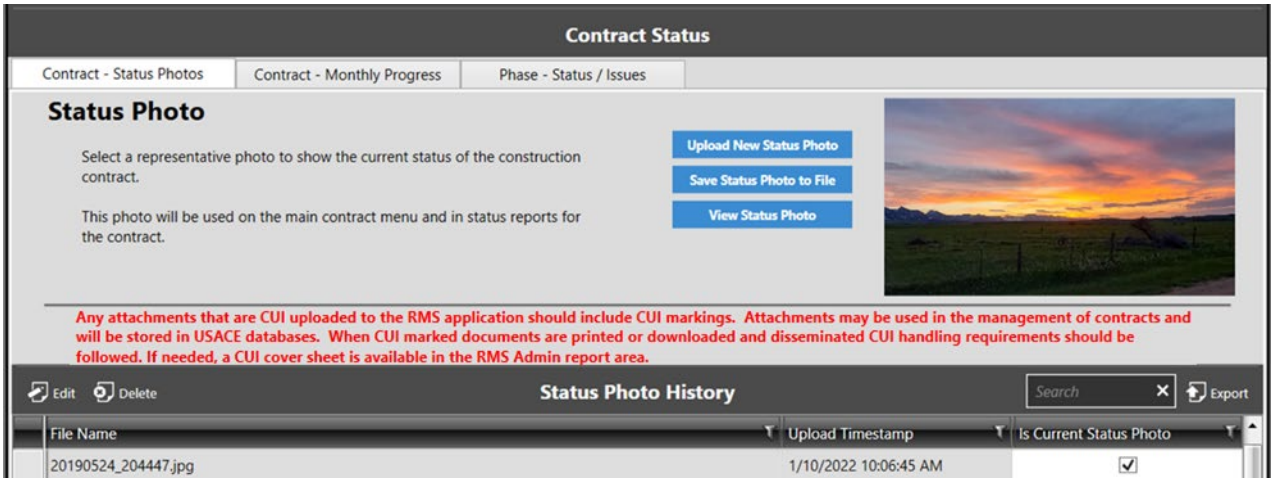
After selecting the options to view on the report, the report is split into four quadrants. Which will look similar to below:



The four quadrants are (1) Schedule, (2) Contract Status Photo, (3) Progress and (4) Funding. Under the four main quadrants, depending on the options selected prior to viewing the report, users will also see information on the scope of the project, issues, both customer and USACE reported issues, and any remarks made. The remarks and issues can be found by going to the ***Administration | Contract Status*** module under the ***Phase – Status/Issues*** tab.

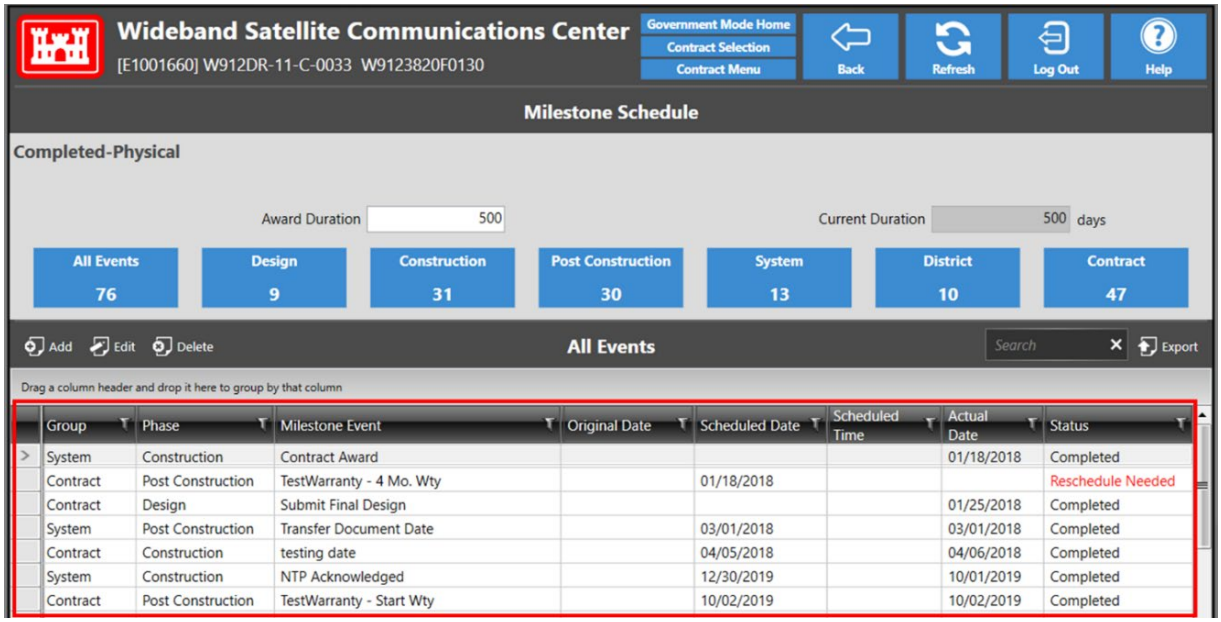


The Contract Status Photo also comes from this module, though it comes from the ***Contract – Status Photos*** tab.



12.4.1 Schedule

The data for the Schedule section comes from the system milestones associated with the contract.



Group	Phase	Milestone Event	Original Date	Scheduled Date	Scheduled Time	Actual Date	Status
System	Construction	Contract Award				01/18/2018	Completed
Contract	Post Construction	TestWarranty - 4 Mo. Wty		01/18/2018			Reschedule Needed
Contract	Design	Submit Final Design				01/25/2018	Completed
System	Post Construction	Transfer Document Date		03/01/2018		03/01/2018	Completed
Contract	Construction	testing date		04/05/2018		04/06/2018	Completed
System	Construction	NTP Acknowledged		12/30/2019		10/01/2019	Completed
Contract	Post Construction	TestWarranty - Start Wty		10/02/2019		10/02/2019	Completed

The contract time growth and the BOD Time growth are calculated based on the contract award, any mods that affect the time/length of the contract, and the set duration of the contract. The latter two can be viewed on the bottom of the ***Administration | Contract Status*** module under the ***Phase – Status/Issues*** tab.

Cost / Time Growth

Current Contract Including Completed Mods (Code 6)		
Base Award	$6,869,787.00	242 days
Options/Definitizations	$0.00	0 days
Original Contract	$6,869,787.00	242 days
Controllable Mods	$173,554.53	0 days
Uncontrollable Mods	$275,762.14	3 days
Current Contract	$7,319,103.67	245 days

Controllable Growth		Total Growth	
% Cost	% Time	% Cost	% Time
2.5%	0.0%	6.5%	1.2%

Original Required Completion 01/10/2012
Current Required Completion 01/13/2012

Approved Contract Including Approved Changes (Code 5)		
Current Contract	$7,319,103.67	245 days
Options/Definitizations	$0.00	0 days
Orig Approved Contract	$7,319,103.67	245 days
Controllable Mods	$0.00	0 days
Uncontrollable Mods	$0.00	0 days
Approved Contract	$7,319,103.67	245 days

Controllable Growth		Total Growth	
% Cost	% Time	% Cost	% Time
2.5%	0.0%	6.5%	1.2%

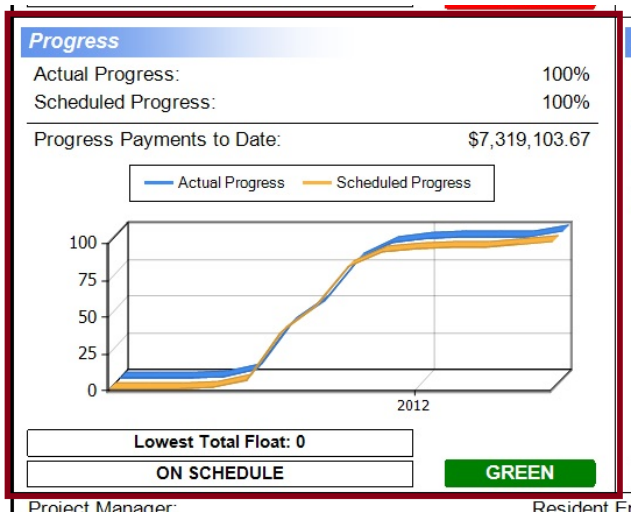
Approved Required Completion 01/13/2012

Proposed Contract Including Proposed Changes (Code 4)		
Approved Contract	$7,319,103.67	245 days
Options/Definitizations	$0.00	0 days
Orig Proposed Contract	$7,319,103.67	245 days
Controllable Mods	$0.00	0 days
Uncontrollable Mods	$0.00	0 days
Proposed Contract	$7,319,103.67	245 days

Controllable Growth		Total Growth	
% Cost	% Time	% Cost	% Time
2.5%	0.0%	6.5%	1.2%

Proposed Required Completion 01/13/2012

12.4.2 Progress



RMS combines the Progress Payments and the Activity Schedule to form the Contract Status Monthly Progress. The ***Contract status - Monthly Progress*** tab populates to the Contract Status sheet to form the Actual Progress and Scheduled Progress shown in the graph.

Changes made to the ***Contract Status*** module ***Monthly Progress*** tab will affect the graph but may take 24 to 72 hours to update.

Note: There are multiple ways to update the progress graph please check with the district's policy prior to proceeding.

The lowest total float comes from the activity schedules only if a contract is using an SDEF file. If there is no SDEF file used, then the total float will always be zero. The lowest total float is a calculation of the lowest difference between the scheduled start early and late dates or the scheduled finish early and late dates.

12.4.3 Funding

1 - *Award Contract with options* populates from the ***Award CLINs*** and ***Contract Modifications*** modules.

2 - *Modifications*. This populates to the Contract Status Sheet from ***Contract Modifications*** module.

3 - *Current Contract*. This populates from two places in RMS: from the ***Award CLINs*** and ***Contract Modifications*** modules. RMS combines these to form the Current Contract which can be viewed in the ***Current CLINs*** module.

4 - *Pending Changes*. This populates from the Contract Modifications and Contract Changes that have not been completed in RMS. RMS combines the these to form Pending Changes.

5 - *Estimated Contract* combines from two places: from ***Current CLINs*** and ***Contract Changes***. It only includes the Contract Changes that are not completed in RMS.

The funding graph populates from Completed Contract Modifications. The four areas of the graph are divided up by the Reason Code, depending on what Reason Code is selected when completing the Modification.

Note: There must be one award CLIN attached to the contract in order for the graph to generate.