

ePM Quick Reference Guide #041
Issues and Logs

WHAT IS . . .

Issues & Logs are ePM documents used to log, manage, and verify the resolution of items that require attention on a project. There are several types of Issues & Logs and each has their own business process requirements for reporting purposes. They comprise of the following:

<table>
<thead>
<tr>
<th>Issue Types</th>
<th>Issue Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accident Report</td>
<td>Used to track and report all accident incidents on a project. Serves as the Accident Investigation Report.</td>
</tr>
<tr>
<td>Design Review Comments</td>
<td>After users receive notification that a drawing package is ready for review they have the ability to create multiple comments associated with the package. Comments are routed to the appropriate users to reply, take action, and confirm a resolution.</td>
</tr>
<tr>
<td>Fire Report</td>
<td>Used to track and report all fire incidents on a project. Serves as the Fire Incident Report.</td>
</tr>
<tr>
<td>Injury Report</td>
<td>Used to track and report work-related injuries that occur on a project.</td>
</tr>
<tr>
<td>Issue</td>
<td>Used to manage, log, and track other issues that occur on a project.</td>
</tr>
<tr>
<td>Punchlist</td>
<td>Used to track information about items in your project that must be finished, fixed or redone to complete the project.</td>
</tr>
<tr>
<td>Safety Notice</td>
<td>Used to track safety violations that occur on a project.</td>
</tr>
</tbody>
</table>

Table 1.1 – Issue Types and Descriptions

WHO USES . . .

- Superintendent
- Construction Manager
- General Contractor/Design-Build Contractor
- GSA Project Manager & Staff
- Inspector
- Architect / Engineer
- Job Site Administrator
NEEDED DOCUMENTS . . .

- Photos and / or Attachments

HOW TO. . .

See screenshots within this document for additional information.

STEPS TO CREATE ISSUES & LOGS

1. Log into ePM as a user with the Issues & Logs security role and navigate to the appropriate project.


3. Click the ‘New’ button.

4. Enter the Title in the Details section. Also, enter a Brief Description.
5. Enter the **Initiating Party**, **Responsible Party** and **Date Reported** information.

6. Each Deficiency has a **Classification / Location** section with various fields to help track and report details of the deficiency. Select the 'Lookup List' icon and select an item from each that best categorizes the deficiency.

**NOTE:** Use the following pages in the document if further action is necessary for tracking this deficiency.
7. **Resolution Page**: Enter the **Due Date**. Once the deficiency is resolved, enter the **Resolution Note** and the deficiency **Completed Date**. The **Created Date** and **Closed Date** are populated automatically as the document transitions through workflow.

8. **Action Items Page**: For each action item, record the **Company**, **Contact**, **Task** and **Due Date**, and eventually the **Date Completed**.

   **NOTE**: When the Task is complete, the Contact enters the **Date Completed**, a **Note** of the action taken, and checks the **Is Complete** box.

9. Once all the **Action Items** are entered, select the **Workflow** menu and **Activate** the document.

10. **Inspection Log Page**: Inspections items for the issue/log are recorded on this page

    **IMPORTANT**: Once a Issues & Logs item is inspected and all action items are complete, remember to enter the **Resolution Note** and **Completed Date** from the Resolution page and Date Tracking section The Issues & Logs document is now complete.
REFERENCES

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the ePM Portal.

- QRG 01 - Navigating ePM
- QRG 02 - Using the ePM Address Book