

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:

Issue Types	Issue Description
Accident Report	Used to track and report all accident incidents on a project. Serves as the Accident Investigation Report.
Design Review Comments	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.
Fire Report	Used to track and report all fire incidents on a project. Serves as the Fire Incident Report.
Injury Report	Used to track and report work-related injuries that occur on a project.
Issue	Used to manage, log, and track other issues that occur on a project.
Punchlist	Used to track information about items in your project that must be finished, fixed or redone to complete the project.
Safety Notice	Used to track safety violations that occur on a project.

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

ePM Quick Reference Guide #041

Issues and Logs



NEEDED DOCUMENTS . . .

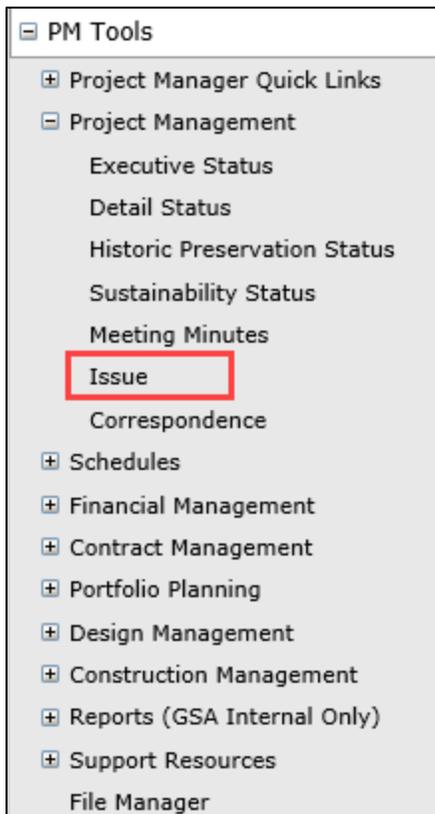
- Photos and / or Attachments

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.
2. Navigate to your Issues & Logs register by clicking on **PM Tools > Project Management > Issues**. The Issues register displays.

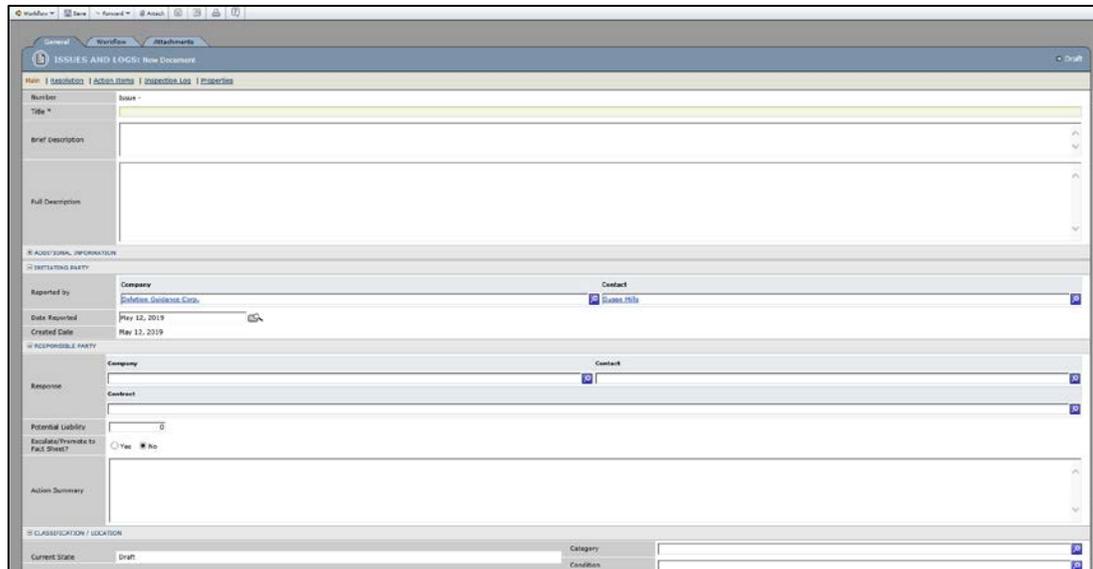


3. Click the '**New**' button.
4. Enter the **Title** in the Details section. Also, enter a **Brief Description**.

ePM Quick Reference Guide #041

Issues and Logs

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.



The screenshot displays the 'ISSUES AND LOGS' form in a 'Draft' state. The form is organized into several sections:

- General Information:** Includes fields for 'Number', 'State', 'Title', 'Brief Description', and 'Full Description'.
- ADDITIONAL INFORMATION:**
 - INITIATING PARTY:** Fields for 'Reported by' (Company: *Continuum Software Corp.*, Contact: *James Mills*), 'Date Reported' (May 12, 2019), and 'Created Date' (May 22, 2019).
 - RESPONSIBLE PARTY:** Fields for 'Response' (Company, Contact), 'Potential Liability' (0), and 'Escalate/Provide to FACE Sheet?' (Yes/No).
 - ACTION SUMMARY:** A large text area for notes.
- CLASSIFICATION / LOCATION:** Fields for 'Current State' (Draft), 'Category', and 'Condition'.

NOTE: Use the following pages in the document if further action is necessary for tracking this deficiency.

ePM Quick Reference Guide #041

Issues and Logs



- 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.

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

Is Completed	Referred Contract	Company	Contact	Task	Accepted Date	Potential Liab. Date Completed	Actual Cost	Note

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

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

ePM Quick Reference Guide #041

Issues and Logs

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