

Issues & Logs

What are Issues & Logs?

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

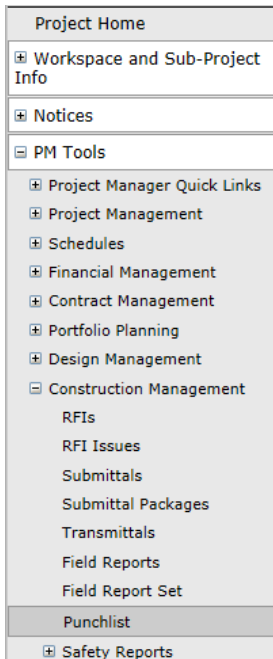
Who Will Use This?

- ✓ Superintendent
- ✓ General Contractor
- ✓ Project Manager & Staff
- ✓ Project Engineer
- ✓ Construction Manager
- ✓ Architect/Engineer
- ✓ Inspector
- ✓ Job Site Administrator

Steps to Create Issues & Logs

In this example, we will create a Punch List item as a Issues & Logs document.

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 > Construction Management > Punchlist**. The Punchlist register displays.



3. Click the **'New'** button.

4. Enter the **Title** in the Details section. Also, enter a **Brief Description**.

General		Workflow	Activity Log	Attachments
ISSUES AND LOGS: Construction doesn't meet contract document specifications and building code.				
Main Resolution Action Items Inspection Log Properties				
<input type="checkbox"/> SUMMARY				
<input checked="" type="checkbox"/> DETAILS *				
Number	Issue - 0001			
Title *	Atrium			
Brief Description	Construction doesn't meet "Green" contract document specifications and building code.			
Full Description				
<input type="checkbox"/> ADDITIONAL INFORMATION				
<input type="checkbox"/> INITIATING PARTY				
<input type="checkbox"/> RESPONSIBLE PARTY				
<input type="checkbox"/> CLASSIFICATION / LOCATION				
<input type="checkbox"/> DESIGN DOCUMENT				

5. Enter the **Initiating Party**, **Responsible Party** and **Date Reported** information.

<input checked="" type="checkbox"/> INITIATING PARTY					
Reported by :	<table border="1"> <thead> <tr> <th>Company</th> <th>Contact</th> </tr> </thead> <tbody> <tr> <td>PBS</td> <td>Patty Milestone</td> </tr> </tbody> </table>	Company	Contact	PBS	Patty Milestone
Company	Contact				
PBS	Patty Milestone				
Date Reported :	<input type="text" value="10/08/2008"/>				
Created Date :	10-Oct-2008				
<input checked="" type="checkbox"/> RESPONSIBLE PARTY					
Response :	<table border="1"> <thead> <tr> <th>Company</th> <th>Contact</th> </tr> </thead> <tbody> <tr> <td>GC Training Company</td> <td>Bob Builder</td> </tr> </tbody> </table>	Company	Contact	GC Training Company	Bob Builder
Company	Contact				
GC Training Company	Bob Builder				

- 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.

CLASSIFICATION / LOCATION			
Current State :	Draft	Building :	Main : Main
Priority :	HIGH : High Priority	Floor :	1 : 1st Floor
Discipline :	ID : Interior Design	Room :	BRK : Break Room
Area/Zone :	A2Z1 : A2/Z1	Category/Location 4 :	
Cause :	WRKM : Workmanship	Category/Location 5 :	

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

- 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.

General		Workflow		Activity Log		Attachments	
ISSUES AND LOGS: Atrium (Issue0001) Draft							
Main Resolution Action Items Inspection Log Properties							
RESOLUTION							
Resolution Note	Construction is rendered as "green" based on Design Review comments and clarifications to specifications.						
Reason Suspended							
Times Submitted for Closure	0						
Reason Closed							
DATE TRACKING							
Created Date	03-May-2011						
Est. Complete							
Due Date	05/10/2011						
Completed Date							
Closed							

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

Is Completed	Ref: Con	Company	Contact	Task
<input type="checkbox"/>		Meridian Systems Inc.	Gary Goswick	Replace tile in Atrium

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

*Inspection Date	Company	Contact	Inspection Note
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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 screenshot displays two sections of the ePM interface:

- RESOLUTION:** A text area labeled "Resolution Note :" containing the text "Subcontractor replaced ceiling tile as suggested on 10/15/09." This section is highlighted with a red border.
- DATE TRACKING:** A table-like structure with the following entries:
 - Created Date : 10-Oct-2008
 - Due Date : 10/17/2008
 - Completed Date : 10/16/2008 (This row is highlighted with a red border)
 - Closed :


The Issues & Logs document is now complete.


Tips

- ✓ Required fields are marked with an asterisk.

- ✓ Use the 'Forward' button if collaboration is required from other users.

- ✓ Click on the **Activity Log** tab to view the audit trail of the document.

- ✓ Clicking the online help button provides generic help related to Issues & Logs, NOT for the specific uses of GSA's Issues & Logs documents.


- ✓ To explode or collapse sections in a document, click on the double headed arrow buttons:


- ✓ Notices with yellow icons require action; blue means a document was forwarded; white means you were cc'd.

- ✓ For additional help and support, contact your GSA Regional Point of Contact:

- ✓ Use the **Attachments** tab to link Issues & Logs to other ePM or external documents
