

Section #7: CMS (Criteria Management System)

7.1 CMS (Criteria Management System) Introduction

The CMS module supports collaboration in the review of government documents by recording who is responsible for the document and also by providing a place for posting of draft documents and collection of evaluations/comments about those draft documents from various review participants. CMS further supports review of the evaluative comments, maintaining a record of activities surrounding the publication of a draft document.

Technical proponents of documents are able forward their documents to NIBS (National Institute of Building Standards) for posting on the Whole Building Design Guide web site (<http://www.wbdg.org/ccb/>)

The review process in CMS functions similarly to the review process you read about in DrChecksSM. Reviews created are associated to specific documents, and individuals can be assigned to each document as Technical Proponents and Technical Representatives. Document reviews need not be associated with any particular DrChecksSM project.

7.2 Adding a Document (*Criteria Administrators*)



Figure 7-1



Figure 7-2

The first step to accepting CCR's (Criteria Change Requests) on ProjNetSM is to add a document to CMS. In order to be able to add a document to CMS, you will first need to be assigned as a Criteria Administrator. To add a document:

1. Log in to the ProjNetSM website.
2. On the "My Account/Design/Bid/Build" menu bar across the top of the page, move your mouse over the "Design" button and click on "CMS" from the resulting drop-down menu that appears (Figure 7-1).
3. In the upper right-hand corner of the screen, you will see two links, "Add Document" and "Global Reports" (Figure 7-2). Click on the "Add Document" link.
4. The "Add New Document" form displays (Figure 7-3). Select a Document Type from the "a. Document Type" drop-down menu.

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CMS / Select Document / Add New Document

Enter the information below to enter a new document.

a. Document Type (req.) Please select from below

b. Doc Nbr (req.)

c. Document Name (req.)

d. Description (opt.)

e. Target UFC (opt.)

(Review the [UFC Master List](#) to select a correct UFC.)

f. Participating Agencies (req.)

ARMY
AirForce
DEMO
GSA
NASA
NAVFAC
NIH
RCE

Insert New Document

Figure 7-3

5. Enter the document number in field “b. Doc Nbr”. (This field is required).
6. Enter the document name in field “c. Document Name”. (This field is also required).
7. Optionally, you may choose to enter a document description in field d. and/or a Target UFC in field e.



Click on the “Review the UFC Master List” link to open a new window containing the UFC List if you need assistance selecting the correct UFC.



8. Click on the name of the participating agency(ies).

Hold down the CTRL key while clicking on the agency names to select multiple agencies.

9. Click the “Insert New Document” button.
10. When the document has been added successfully, the following confirmation message displays on the screen (Figure 7-4):

The document has been added.

Figure 7-4

11. The “Edit Document” options are shown immediately following document submission to allow you to change agencies, document versions and user assignments immediately after the document has been entered. Document editing options are described in the next section.

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7.3 Editing a Document (*Criteria Administrators*)



Figure 7-5

Document editing options are automatically displayed immediately following a new document submission. Once the document has been entered, you can also reach the document editing options at any time by performing the following steps:

1. Log in to the ProjNetSM website.
2. On the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CMS” from the resulting drop-down menu that appears (Figure 7-5).
3. Click on the hyperlinked document number in the “Doc Nbr” column.
4. The “Edit Document” page displays (Figure 7-6):

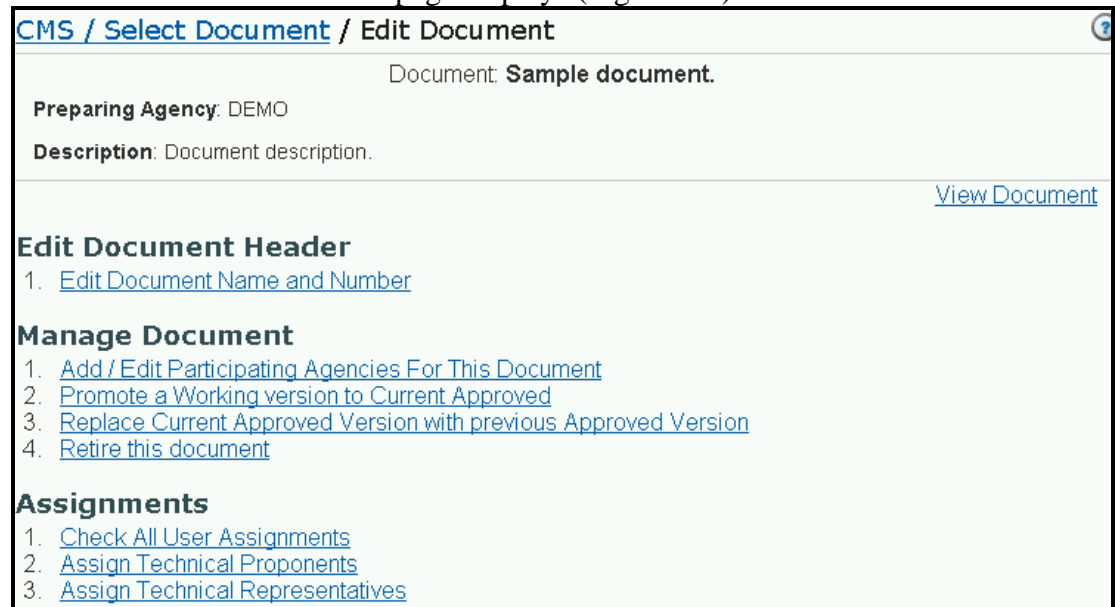


Figure 7-6

5. Click on the menu option you would like to modify. The document editing options are as follows:
 - **Edit Document Name and Number:** Change the name or document number if they were originally entered incorrectly.
 - **Add / Edit Participating Agencies For This Document:** Select the radio buttons next to the participating agencies for the document.
 - **Promote a Working version to Current Approved:** Select the version you wish to promote as the current approved version.



Setting a new version as the Current Approved version will remove all other documents except the new one you specify.

- **Replace Current Approved Version with previous Approved Version:** “Rolls back” the current approved version to the last saved Approved version.
- **Retire this document:** Allows a document to be “retired” so it is no longer visible to anyone except for Technical Proponents and Criteria Administrators.

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- **Check All User Assignments:** Displays the current list of users and their assignments to the document. Also allows you to “mass-unassign” users to the document by selecting the check box in the “remove” column and updating the user assignments.
- **Assign Technical Proponents:** Choose technical proponents who will be reviewing the document and CCR’s submitted against it.
- **Assign Technical Representatives:** Select the users you would like to designate as technical representatives for the document.

7.4 Searching For Documents

To search for a document:

1. Log in to the ProjNetSM website.
2. On the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CMS” from the resulting drop-down menu that appears.
3. The “Select Document” page. Locate the Document Search box at the top of the page (Figure 7-7):

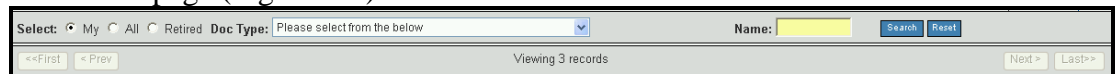


Figure 7-7

4. To search all documents, click the radio button next to “All” on the left-hand side of the toolbar.
5. Select the Document Type from the “Doc Type” drop-down list.
6. Enter a keyword to search on in the “Name” box.
7. Click the “Search” button.

7.5 Global Reports



Figure 7-8

The Global Reports in CMS option provides

1. Log in to the ProjNetSM website.
2. On the “My Account/Design/Bid/Build” menu bar across the top of the page, move your mouse over the “Design” button and click on “CMS” from the resulting drop-down menu that appears.
3. In the upper right-hand corner of the screen, you will see two links, “Add Document” and “Global Reports” (Figure 7-8). Click on the “Global Reports” link.
4. The “CMS and CCR Global Reports” page displays (Figure 7-9):

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[CMS / Select Document](#) / CMS and CCR Global Reports

CCR Global Reports

Submitter Reports Across All Documents

1. [My CCR\(s\)](#)
2. [All CCR\(s\)](#)

Evaluators Reports Across All Documents

1. [CCRs Pending Evaluation](#)

Disposition Reports Across All Documents

1. [Approved Without Finalization](#)
2. [CCRs that have been incorporated](#)
3. [Denied CCRs](#)

Administrator

1. [Status Counts](#)

CMS Global Reports *(Note: these reports are generated once per day approximately 0300 cst)*

1. [UFGS Technical Proponents](#)
2. [Document Technical Proponent Index](#)
3. [Criteria Document Index](#)

Figure 7-9

5. Click on the option for the report you would like to view.



For more information about each of the reports and the data they contain, please refer to the Reports Guide in the Appendix at the end of this manual.