Building Information Tracking System

New BITS users, please start here.

Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management

What is BITS ?

- **The Building Information Tracking System (BITS) is a web-based DGS computer application used for processing:**

  - **Capital Outlay (CO) forms**
    - Specifically, the following types of forms:
      - CO-2, CO-4, CO-5,

        CO-6, CO-8, and CO-14

  - **Building Official (BO) forms**
    - Various types of Building Permits (CO-17… forms), Certificates of Use and Occupancy (CO-13.3 … forms), and a new "Building Permit Closeout" form (CO-13.4 form)

What else does BITS do ?

- **BITS also provides:**

  - Support for various business operations of the Bureau of Capital Outlay Management (BCOM)

  - "View Only" access to forms by central government entities, such as:

    - APA
    - DPB*
    - DRES   (primarily for CO-2s involving property acquisitions)
    - House Appropriations Committee staff
    - Senate Finance Committee staff
    - SCHEV
    - SFMO (for accessing approved Building Permits and Certificates)

----
* DPB also has edit and approval permissions for CO-2 forms and certain CO-8 forms

What else does BITS do ?

- **BITS also provides:**
  - Logs of key data extracted from the following contract documents:
    - CO-3   (A/E Contract)
    - CO-11 (Construction Change Order)

  - BCOM administrative staff will enter the key data from the CO-3 and CO-11 documents into BITS from the "hard copy" or pdf versions of these contract forms submitted to BCOM by the state agencies. The summary data stored in the BITS CO-3 and CO-11 logs is "view only", rather than editable by the agency users.

How do users obtain access ?

- To obtain access to BITS, users must:
  - complete a BITS User Account Request (UAR) form
  - have their BITS Agency Access Coordinator (AAC) approve and submit the UAR form to BCOM

- The UAR form is available for download from the BITS page on BCOM's website (http://bcom.dgs.virginia.gov)

- After user account requests have been activated, users will receive a system generated e-mail providing:
  - their assigned system "username"
  - a link to access the database and create an initial password

What are the password requirements ?

- Passwords must comply with VITA policy, specifically:

  - Passwords must not contain any part of the User Name
  - Passwords must be at least 8 characters long
  - Passwords must include at least three of the following four categories:

    - Uppercase letters
    - Lowercase letters
    - Numbers
    - Special characters (i.e., non-alphanumeric characters)

  - Password time limits are enforced
  - Password reuse is prohibited

How does a user create an initial password ?

- When a new user account has been activated, the user will receive an e-mail message from BITS providing the user's system login User Name and a link to access the system

- Clicking on the link will direct the user to the screen shown below to allow the user to create a personal password:

How do users access the initial Login Page ?

- After creating an initial personal password, the user will receive this screen to direct them to the BITS Login Page:

Virginia.gov   Online Services | Commonwealth Sites | Help | Governor

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Commonwealth of Virginia

DGS

The password for user, "testagencyedit", has been changed.

Return to Login Page

The BITS Login Page

- At the BITS Login Page, the user keys in their User Name and Password to access the system:

The BITS Home Page

- The first page new users will see after logging in will appear similar to this:

BITS Home Page

Home

BITS - Building and Information Tracking System   Version: 10/18/

Welcome test agencyapprove. What do you need to do?

Click on an item to do it...   Click on an topic to learn about it...

- Get an Overview of BITS   LEARN THE PURPOSE AND BASICS OF USING BITS.
- Use the BITS Main Menu   THE MAIN MENU ALLOWS QUICK NAVIGATION TO BITS SCREENS.
- Get Help   ACCESS ONLINE HELP INFORMATION.
- Get Assistance   CONTACT BITS SUPPORT STAFF OR VIEW THE BITS WEBPAGE.
- Change My Personal Settings   LEARN HOW TO PERSONALIZE BITS.
- Log Out Safely   LEARN HOW TO EXIT SYSTEM WITHOUT LOSING DATA.
- Work with Projects   VIEW, CREATE, AND EDIT PROJECTS.
- Work with Forms   VIEW, CREATE, EDIT, PROCESS, AND PRINT BO & CO FORMS.
- Work with "My Forms"   THESE ARE FORMS AWAITING ACTION BY YOU.
- See BITS Alerts   VIEW ACTIVE BITS SYSTEM ALERTS.
- View the BITS Acceptable Use Policy   VIEW THE ACCEPTABLE USE POLICY.

- The BITS Home Page is the default start page for all users
- It was designed specifically to orient new users to the system

Using the BITS Home Page

- The links on the <u>left</u> are tasks a user may wish to perform

- The links on the <u>right</u> are training information related to the task

Click on an item to do it...

- Get an Overview of BITS
- Use the BITS Main Menu
- Get Help
- Get Assistance
- Change My Personal Settings
- Log Out Safely
- Work with Projects
- Work with Forms
- Work with "My Forms"
- See BITS Alerts
- View the BITS Acceptable Use Policy

Click on an topic to learn about it...

- LEARN THE PURPOSE AND BASICS OF USING BITS.
- THE MAIN MENU ALLOWS QUICK NAVIGATION TO BITS SCREENS.
- ACCESS ONLINE HELP INFORMATION.
- CONTACT BITS SUPPORT STAFF OR VIEW THE BITS WEBPAGE.
- LEARN HOW TO PERSONALIZE BITS.
- LEARN HOW TO EXIT SYSTEM WITHOUT LOSING DATA.
- VIEW, CREATE, AND EDIT PROJECTS.
- VIEW, CREATE, EDIT, PROCESS, AND PRINT BO & CO FORMS.
- THESE ARE FORMS AWAITING ACTION BY YOU.
- VIEW ACTIVE BITS SYSTEM ALERTS.
- VIEW THE ACCEPTABLE USE POLICY.

- The training information on the right corresponds to the adjacent task on the left
- It is recommended that new users always view the training materials (on the right) before attempting to perform the related task (on the left)

The BITS Home Page

- Once users are proficient in using BITS, they can configure BITS to open to a "Start Page" other than the BITS Home Page

- **RECOMMENDATION:** Agency users, who use BITS on a frequent basis, may wish to set their Start Page to **Forms Home Page** rather than the default **Home Page**

- Changing the Start Page is simple and is discussed in the "Learn How to Personalize BITS" training topic

What browsers are compatible with BITS ?

- BITS is accessed via the internet using any compatible web browser

- Compatible web browsers include:
  - Internet Explorer (Version 8 and higher) *
  - Firefox
  - Google Chrome
  - Opera

- The URL for BITS is: https://bits.dgs.virginia.gov

* **IMPORTANT:**   If using Internet Explorer 8 (or a higher version), "Compatibility View" must be disabled to allow certain features of BITS to function properly in this web browser.   Please refer to the instructions on the next slide.

Disabling "Compatibility View"

IMPORTANT

- To disable "Compatibility View", from the Internet Explorer menu, select "Tools" then "Compatibility View Settings":

- In the resulting dialog box, if the option labeled "Display all websites in Compatibility View" is checked, <u>uncheck it</u>:
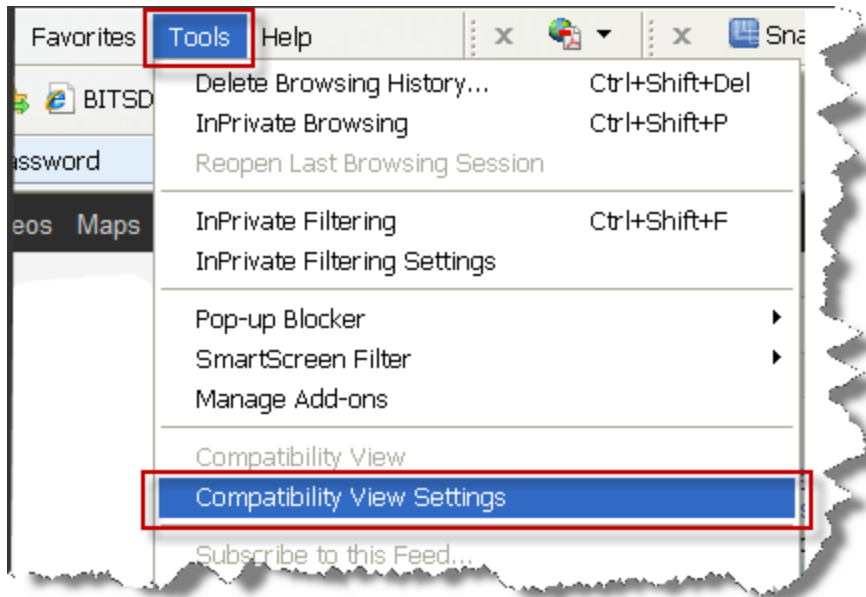
Recommended Screen Resolution

- The recommended screen resolution when using BITS is **1024 by 768** (the current standard setting for most monitors)
- Lower resolutions such as 800 by 600 will work, however, users will have to scroll more frequently to view screen data
- Higher resolutions will also work, however, the text will appear smaller
- To adjust display settings in Windows:
  - Click on the Windows Start Button
  - Open the Control Panel
  - Select Display
  - Select the "Settings" tab
  - Adjust the screen resolution slider to 1024 by 768
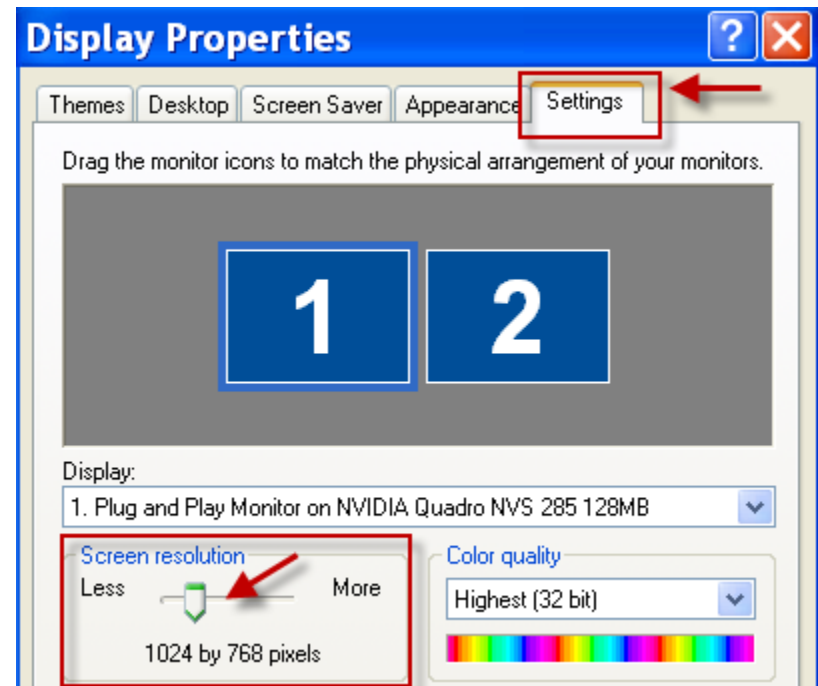
Full Screen Mode

- Users who have many toolbars at the top and/or bottom of their screen may not fully display all BITS screens and/or may have to scroll frequently
- To help avoid this, BITS can be displayed in full screen mode
- You can toggle in and out of full-screen mode by using the **F11** key
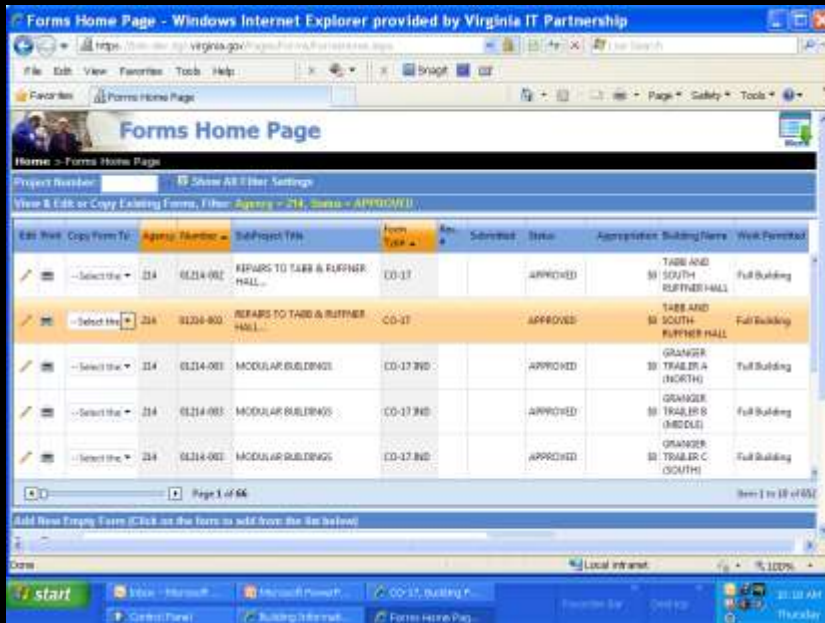
The Login Screen

- It is recommended that new users create an internet "favorite" to the https://bits.dgs.virginia.gov web address to take them directly to the BITS Login Page

- Users who forget their password can click on the "Forgot password" link

- Users who know their current password, but wish to change it, may do so at any time by clicking on the "Change password" link

Building Information Tracking System
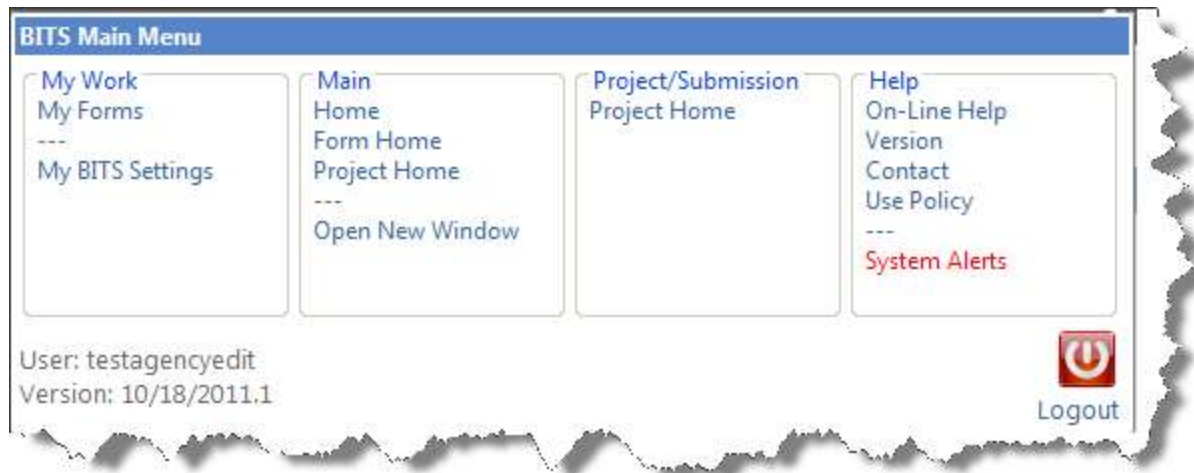
Using the BITS Main Menu

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BITS Main Menu

- The BITS Main Menu icon is always available in the upper right corner of each BITS page

- Click on the Menu icon at any point to call up the BITS Main Menu

- The Main Menu selections displayed vary by each user's assigned system permissions
- Users will only see the menu choices they can access

BITS Main Menu

- To access a specific BITS page, such as the Form Home page, just click on the text in the BITS Main Menu

My Work

- The **<u>My Work</u>** section of the BITS Main Menu contains the following menu choices for most agency users:

  - **My Forms** – these are forms awaiting action by the logged-in user
  - **My BITS Settings** – these are customizations the user can make to BITS (refer to the "Learn How to Personalize BITS" help topic for more info)
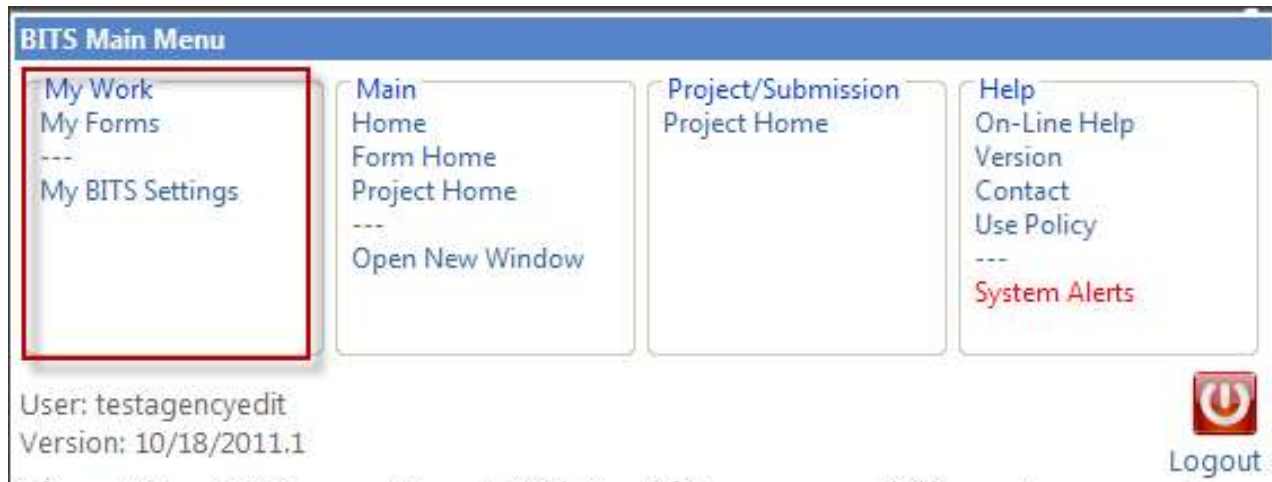
Main

- The **Main** section of the BITS Main Menu contains the following menu choices for most agency users:

  - **Home** – the BITS default Home Page
  - **Form Home** – the initial page for accessing BO and CO forms
  - **Project Home** – the initial page for viewing general project data
  - **Open New Window** – opens another BITS window
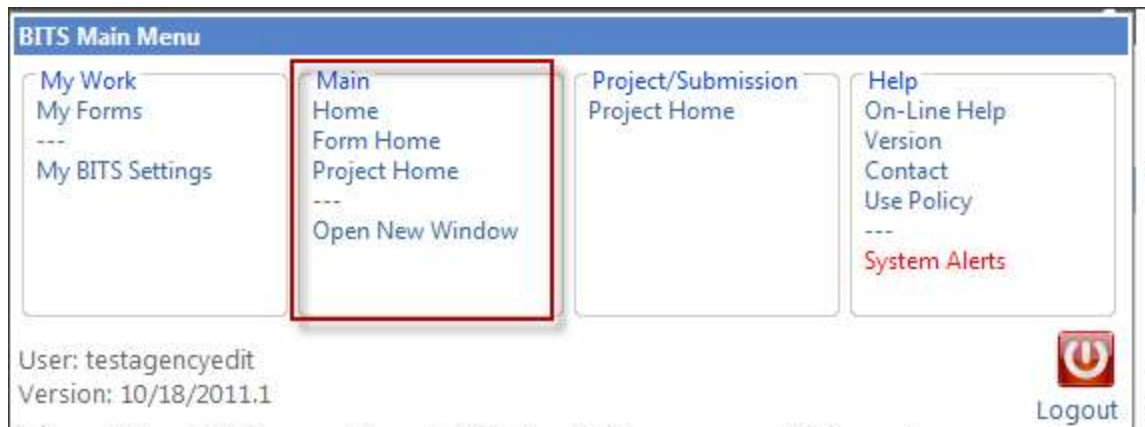
CAUTION: The capability to open BITS in multiple windows is a useful feature, however, there is also a risk of data loss if proper procedures are not followed. Please refer to the help topic entitled "Learn How to Exit System Safely without Losing Data" if you open BITS in multiple windows or in multiple browser tabs.

BITS Main Menu

My Work
My Forms

My BITS Settings

Main
Home
Form Home
Project Home

Open New Window

Project/Submission
Project Home

Help
On-Line Help
Version
Contact
Use Policy

System Alerts

User: testagencyedit
Version: 10/18/2011.1

Logout

Project/Submission

- The **Project/Submission** section of the BITS Main Menu contains the following menu choice for most agency users:

  - **Project Home** – this page is used to find and view general project data stored in BITS. (Agency users do not have the ability to add/edit project data directly, however, project data is collected from Agencies via the forms they submit in BITS.)
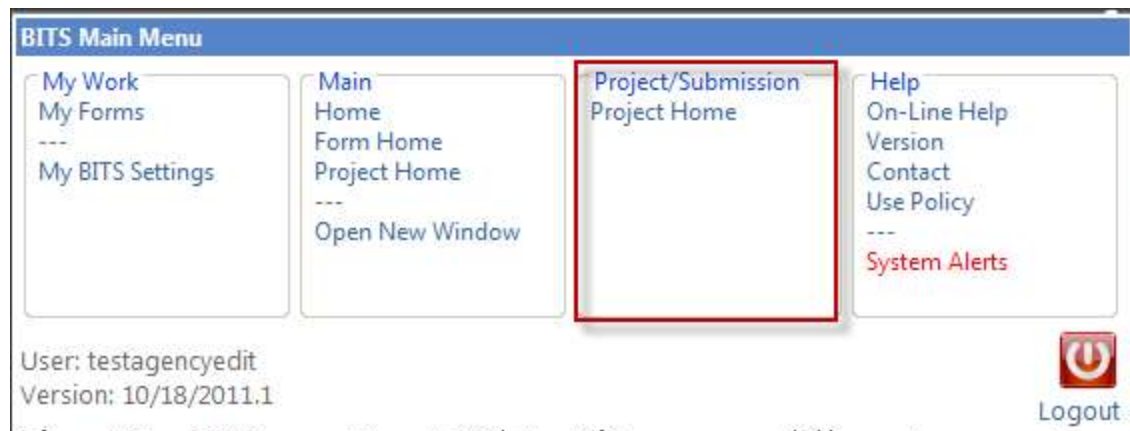
Help

- The **Help** section contains the following menu choices:

    - **On-Line Help** – provides direct access to self-help topics
    - **Version** – identifies BITS versions and describes program modifications
    - **Contacts** – provides links to BITS email address and webpage for support
    - **Use Policy** – displays the BITS Use Policy which all users must accept
    - **System Alerts** – provides access to various system alert messages
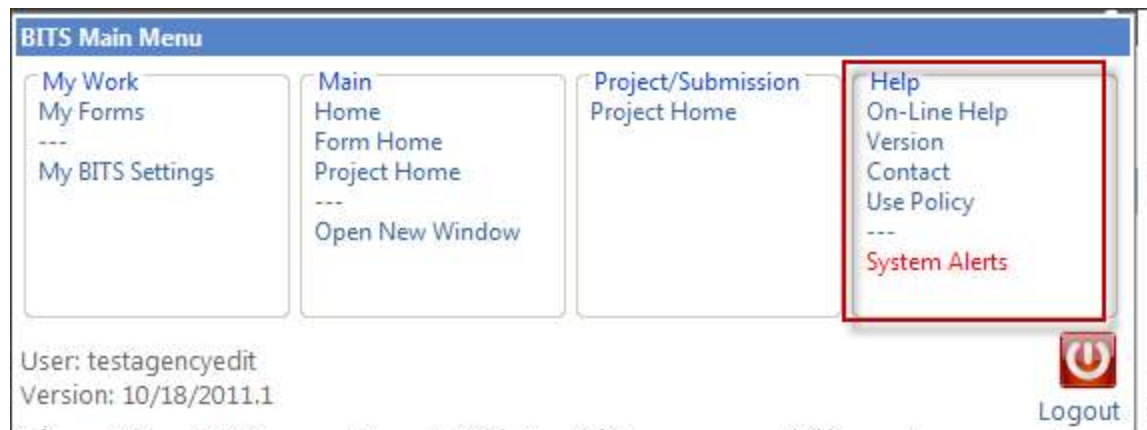
Logging Out of BITS

- To log out of BITS, click on the Main Menu's "Logout" icon
- Be sure to save any data that was added or edited (on each open BITS window or browser tab) prior to logging out
  - (Please review the help topic entitled "Learn How to Exit System Safely without Losing Data" when opening BITS in multiple windows or in multiple browser tabs.)

Building Information Tracking System

Accessing Online Help Information

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Accessing Help

- **There are several ways to access self-help information in BITS**

  - View relevant help topics by selecting from the "learn about" links on the BITS Home Page

  - Press the F1 key at any time to view help info that is relevant to the current page

  - Click "On-Line Help" on the BITS Main Menu
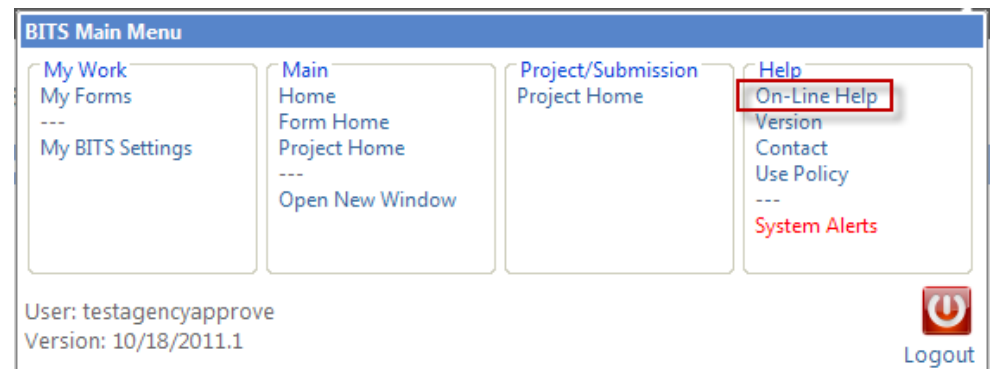
Building Information Tracking System

Getting Assistance

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Division of Engineering & Buildings
Bureau of Capital Outlay Management

Getting Assistance

- To seek assistance, users can either:

  - Select the "Get Assistance" link on the BITS Default Home Page, or

  - Select the "Contact" link on the BITS Main Menu

Getting Assistance

- Either link will direct users to the BITS "Contact Us" page
- From the Contact Us page, users can either:
  - Send an e-mail to the BITS assistance address (bits@dgs.virginia.gov), or
  - Access the BCOM's website's BITS page to see answers to frequently asked questions and view other general BITS support information

Contact Us

Home > Contact Us

For immediate BITS support, contact: bits@dgs.virginia.gov

Also, please visit the BITS page on the BCOM website for answers to frequently asked questions and other general BITS support information:
Bureau of Capital Outlay Management Web Page

Getting Assistance

- The bits@dgs.virginia.gov mailbox is monitored regularly during normal working hours (Mon-Fri, 8:00-5:00, excluding holidays)
- It is NOT a 24/7 Help Desk
- Assistance requests are handled in the order they are received
- Requests will be directed to an appropriate BCOM or DGS Information Technology staff member for a reply by e-mail or telephone
- When submitting a request, be sure to provide:
  - Name
  - Email address
  - Phone number
  - An adequate description of the issue
  - Screenshots may also be included to help facilitate troubleshooting

Getting Assistance

- During periods when personal assistance is not available, users are encouraged to visit the BITS support webpage

Contact Us

Home > Contact Us

For immediate BITS support, contact: bits@dgs.virginia.gov

Also, please visit the BITS page on the BCOM website for answers to frequently asked questions and other general BITS support information:

→ Bureau of Capital Outlay Management Web Page

- Answers to commonly-asked questions or widespread issues will be posted on this page for general reference
- This page (on the BCOM website) is external to BITS and this webpage may be accessed even if BITS is temporarily offline

Building Information Tracking System

Changing Personal Settings

Changing Passwords

- There are several ways to change a BITS password:
  - One method is by using the "Change Password" link on the BITS Login Page

  - The "Change Password" function is also available on the "My BITS Settings" page and is described on the next several slides

Changing Passwords

- Click on the "Menu" icon to access the "BITS Main Menu"

- In the "BITS Main Menu", click on "My BITS Settings":

(menu choices may vary from this image based on your system permissions)

Changing Passwords

- Under the "User Function" section, select "Change Password":
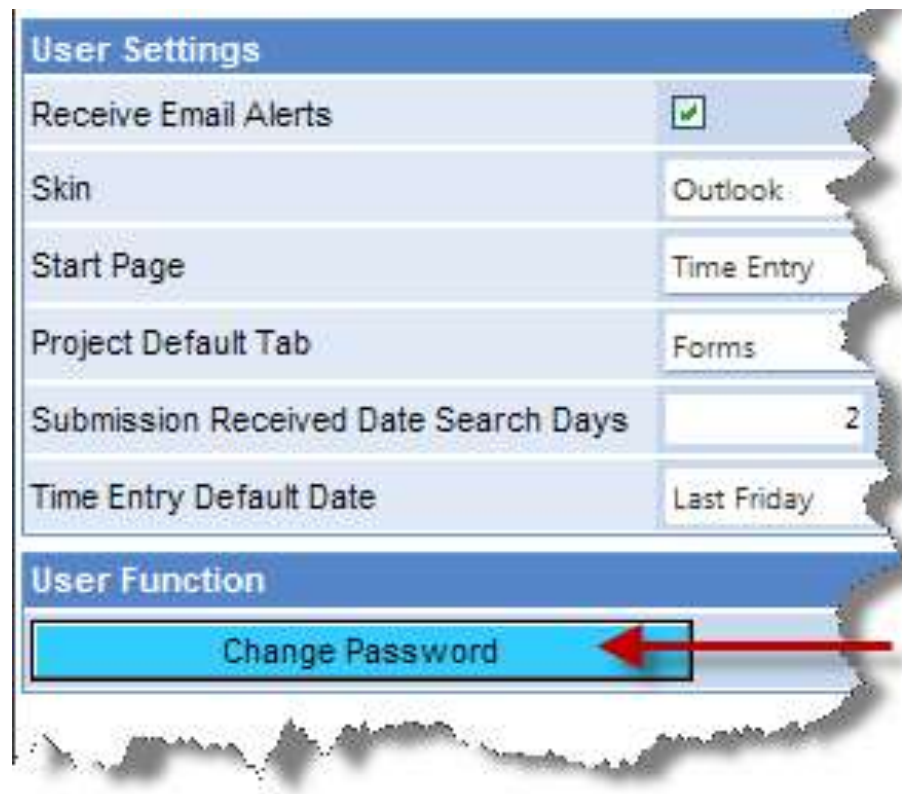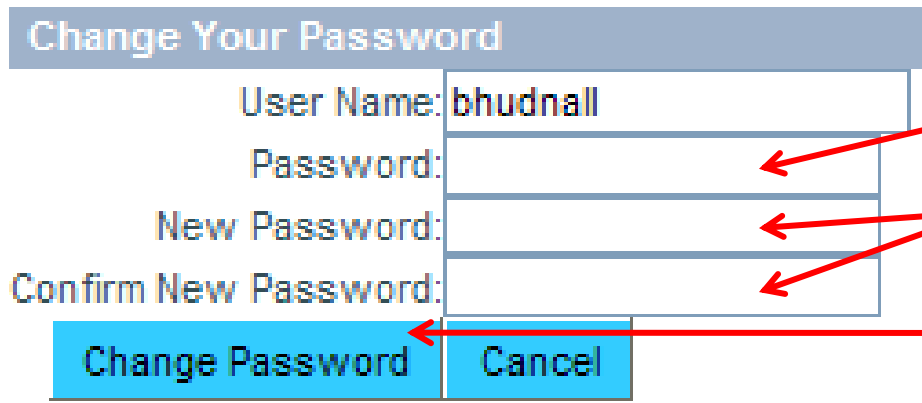
(this screen may vary from this image based on your system permissions)

Changing Passwords

- On the "Change Your Password" page:

Change Your Password

User Name:	bhudnall
Password:	
New Password:	
Confirm New Password:	

Change Password   Cancel

Type in your current password.

Type in your new password.

Click on the "Change Password" button to process the change.

- Click on the "Save" icon to complete the password change

Actions

Save

My BITS Settings

- In addition to the password reset function, the "My BITS Settings" page also contains two other sections:

  - User Information
  - User Settings

- After editing any settings, remember to always click the "Save" button to commit the changes

User Information
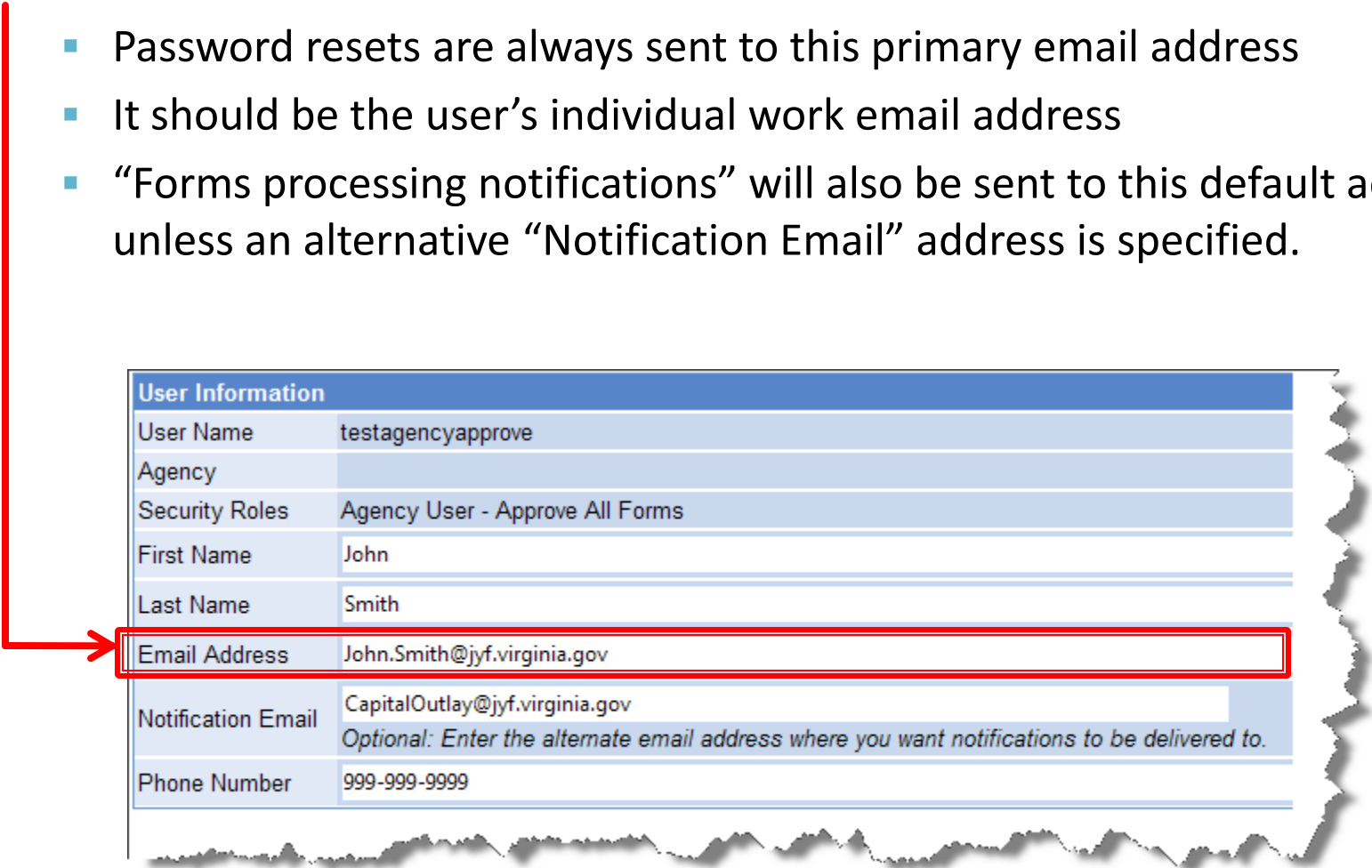
- **In the User Information section, users can edit their:**
  - first name
  - last name
  - regular email address
  - notification email address
  - phone number

- <u>**Users must keep their e-mail addresses current**</u> **as they are used for:**
  - password resets
  - notifications related to the processing of Capital Outlay (CO) and Building Official (BO) forms

| User Information	
User Name	testagencyapprove
Agency	
Security Roles	Agency User - Approve All Forms
First Name	John
Last Name	Smith
Email Address	John.Smith@jyf.virginia.gov
Notification Email	
	Optional: Enter the alternate email address where you want notifications to be delivered to.
Phone Number	999-999-9999

Email Address vs. Notification Email Address

- **<u>Email Address:</u>**
  - Password resets are always sent to this primary email address
  - It should be the user's individual work email address
  - "Forms processing notifications" will also be sent to this default address unless an alternative "Notification Email" address is specified.

User Information	
User Name	testagencyapprove
Agency	
Security Roles	Agency User - Approve All Forms
First Name	John
Last Name	Smith
Email Address	John.Smith@jyf.virginia.gov
Notification Email	CapitalOutlay@jyf.virginia.gov
	Optional: Enter the alternate email address where you want notifications to be delivered to.
Phone Number	999-999-9999

Email Address vs. Notification Email Address

- **Notification Email Address:**
  - Users may wish to specify an alternative email address, such as a group distribution list, to be used specifically for forms processing notifications
  - If a Notification Email Address is specified, all forms processing notifications will be sent to the Notification Email Address rather than to the Email Address.
  - If the Notification Email Address is left blank, forms processing notifications will be sent to the Email Address

User Information	
User Name	testagencyapprove
Agency	
Security Roles	Agency User - Approve All Forms
First Name	John
Last Name	Smith
Email Address	John.Smith@jyf.virginia.gov
Notification Email	CapitalOutlay@jyf.virginia.gov *Optional: Enter the alternate email address where you want notifications to be delivered to.*
Phone Number	999-999-9999

Examples of Email Settings

- In the example below the user, John Smith, specified that BITS should use his personal John.Smith@jyf.virginia.gov e-mail address to send him both password reset messages and forms processing notifications
  - Notice that the "Notification Email" is blank. If blank, the system will use his regular "Email Address" for both password resets and forms processing notifications.

Email Address	John.Smith@jyf.virginia.gov
Notification Email	
	Optional: Enter the alternate email address where you want notifications to be delivered to.

- In the example below John wants forms processing notifications to go to a group distribution list, CapitalOutlay@jyf.virginia.gov, *for which he is a member*. This will allow both him and others in his group to see forms processing notifications that are directed to him by BITS.

Email Address	John.Smith@jyf.virginia.gov
Notification Email	CapitalOutlay@jyf.virginia.gov
	Optional: Enter the alternate email address where you want notifications to be delivered to.

Examples of Email Settings

- If desired, a user can specify multiple addresses
    - In the example below John wants forms processing notifications to go to a group distribution list, CapitalOutlay@jyf.virginia.gov, *for which he is not a member*. He also wants to see these notifications. To do so, both his regular email address and the group distribution list address must be included in the Notification Email box.

Email Address	John.Smith@jyf.virginia.gov
Notification Email	John.Smith@jyf.virginia.gov,capitaloutlay@jyf.virginia.gov

use a comma or semi-colon

    - NOTE: When specifying multiple addresses, they must be separated by a comma or semi-colon.

Receive Email Alerts

- The BITS system sends automated email notifications to users who have a role in processing Capital Outlay and Bldg Official forms
- This feature can be disabled, however, it is HIGHLY RECOMMENDED that users allow the BITS system to send them email notifications
- "Receive Email Alerts" is enabled (checked) by default for all new system users
- A user can disable the receipt of Email Alerts by unchecking the "Receive Email Alerts" box in the user setting shown below.
- Again, disabling this setting is NOT recommended.

User Settings	
Receive Email Alerts	☑
Skin	Outlook ▼
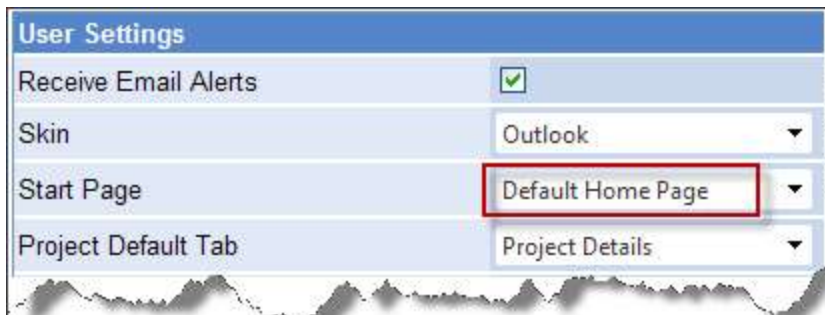
Skins

- A "skin" is simply a pre-designed color palette for displaying the various BITS pages
- To select a preferred Skin, click on the Skin pick list and then select from the available choices
- Web20, Outlook, and Office 2007 are popular choices, however, each user should experiment to decide which skin they prefer
- Skins and other user settings may be changed at any time
- Again, remember to click on the "Save" icon to save any changes
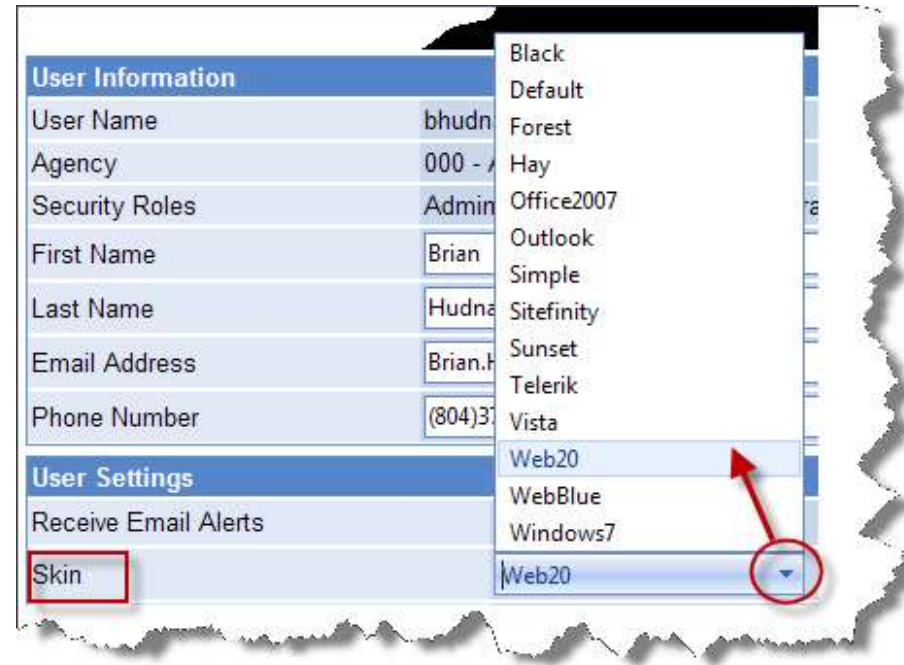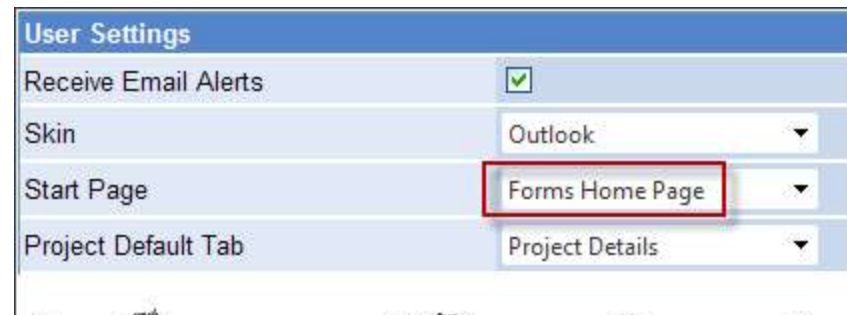
Start Page

- Users can choose a preferred BITS "Start Page"
- The Start Page is the first screen displayed after logging into BITS
- For new users, the Start Page is set to the BITS Default Home Page
- To select a different Start Page, click on the pick list shown below and select from the available choices
- Click "Save" to accept the change

User Settings	
Receive Email Alerts	☑
Skin	Outlook ▼
Start Page	Default Home Page ▼
Project Default Tab	Project Details ▼

User Settings	
Receive Email Alerts	☑
Skin	Outlook ▼
Start Page	Forms Home Page ▼
Project Default Tab	Project Details ▼

RECOMMENDATION: After a new agency user becomes familiar with BITS, the user may wish to change their Start Page from the Default Home Page to the Forms Home Page.

Building Information Tracking System

How to Log Out of BITS Without Losing Data

Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management

Exiting without Losing Data

- Users can open BITS within multiple browser windows and/or within multiple browsers tabs
- For example, a user can have a CO-2 form open in one window or tab, and a CO-8 form open in another window or tab
- This feature is convenient and its use is encouraged
- When only viewing data, this feature imposes no risks, HOWEVER, when using multiple windows or tabs for adding or editing data, it is EXTREMELY important that users SAVE any data they have changed within each open window or tab prior to Logging Out
- When a user logs out of BITS from any window, this effectively kills the entire BITS session. Even though other BITS windows or tabs may still be open, they are inactive and the data can no longer be edited and saved.
- It is HIGHLY RECOMMENDED that users close all open windows and tabs prior to logging out to assure no loss of data

Exiting without Losing Data

- To help prevent the loss of data, a warning message will appear in a "Confirm Logout" dialog box when a user attempts to log out

Confirm Logout

If you have other BITS windows or tabs opened for this browser, please close them. Logging out will cause all of them to become inactive.

Any unaved data in BITS windows and tabs will be lost.

[Logout] [Cancel]

- **To recap the steps for a save logout:**
    1. SAVE any changed data <u>before closing each</u> BITS window or tab
    2. Before logging out, close all but one BITS window or tab
    3. Go to the Main Menu and select "Logout"   Logout
    4. Click the "Logout" button in the "Confirm Logout" dialog box shown above

Building Information Tracking System

Viewing, Adding & Editing Projects

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Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management

Project Information

- Project data can be entered into the BITS Project Master Record via two methods:
  - **<u>Directly</u> by accessing the Project Master Record from the "Project Home Page"**
    (this method is discussed under this help topic)
  - **<u>Indirectly</u> via the "Project Tab" of any BITS form**
    (this method is discussed under the "Forms" help topic)

- The "Project Home Page" can be accessed from the BITS Main Menu or from the BITS Home Page
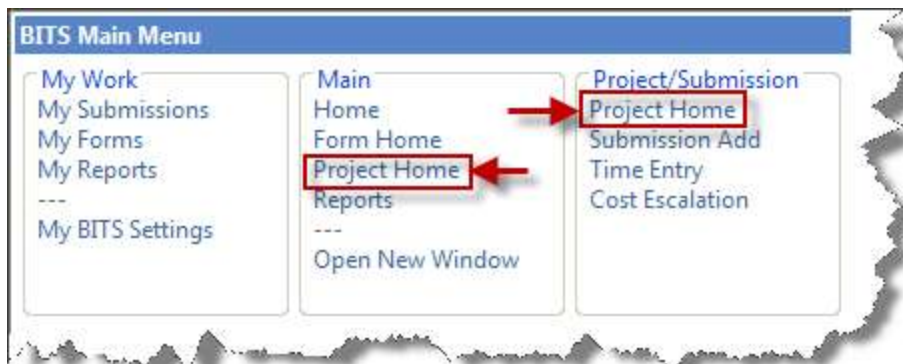
Project Home Page

- The Project Home Page provides direct access to the BITS Project Master Records
  - Project data contained in the Project Master Records is viewable by any BITS user with appropriate rights granted by their Agency Access Coordinator
  - Project data in the Project Master Record, however, is only directly editable by BCOM's administrative staff
  - Agencies may indirectly update the project data in BITS via the forms they submit. This works as follows:
    - Project data in a form, which varies from the data contained in the Project Master Record, is flagged by BITS for the BCOM CO/BO form administrators
    - The BCOM form administrators can then accept the changes, if appropriate, to update the Project Master Record

Project Home Page

- The Project Home Page is a starting point in BITS for finding general project information and related forms
- The Project Home Page (see next slide) provides a single line summary of key project data fields, including:
  - **Agency Number**
  - **Project/Subproject Number**
  - **Project/Subproject Titles**
  - **Capital** (vs. Non-Capital) Project Designator
  - **Facility/Campus**, if applicable
  - **Project Type** (e.g., Dormitory, Museum, Office, etc.)
  - **Alternate Authority** (e.g., HECO, HECOM, Non-State, etc.)
  - **Procurement Method** (e.g., CM, DB, DBB, etc.)
  - **Project Group** (e.g., Chapter 1, etc.)

Project Home Page

The amount of data displayed is controlled by "filters". Filtering is discussed in detail on subsequent slides.

Project Home Page

Home > Project Home

Project Number: [   ] View & Edit Existing Projects, Filter: Agency = 194 ☒ Show Filter

Edit	Agency	Number	Project Title	Subproject Title	Capital Project	Facility/Campus	Type	Alternate Authority	Procurement Method	Project Group
✏	194	15960-000	IMP: RENOVATION OF THE VIRGIN...	IMP: RENOVATION OF THE VIRGIN...	☑		MUSEUM			
✏	194	16016-000	IMP: RENOVATE FINANCE BUILDIN...	IMP: RENOVATE FINANCE BUILDIN...	☑		OFFICE - TENANT UPFITS / BUILDOUTS			
✏	194	16016-001	IMP: RENOVATE FINANCE BUILDIN...	FINANCE ROOF	☑		ROOFING			
✏	194	16016-002	IMP: RENOVATE FINANCE BUILDIN...	IMP: FINANCE BUILDING RENOVAT...	☑		OFFICE			
✏	194	16016-003	IMP: RENOVATE FINANCE BUILDIN...	IMP: FINANCE BUILDING RENOVAT...	☑		OFFICE			
✏	194	16018-000	RENOVATIONS TO THE EXECUTIVE M...	RENOVATIONS TO THE EXECUTIVE M...	☑		RESIDENTIAL			
✏	194	16018-001	RENOVATIONS TO THE EXECUTIVE M...	MANSION SITE	☑		MISCELLANEOUS			

◀ ▭▭▭▭▭▭◻▭▭▭▭ ▶ Page **20** of 38   Item 191 to 200 of

Add Project

As a web-enabled database, information is displayed in pages. Additional pages may be displayed by using the slider or control buttons shown here.

Project Home Page

- To view or edit (with appropriate rights) the Project Master Record, click the pencil icon on the Project Home Page
- In lieu of clicking on the pencil icon, the user may double-click anywhere on the desired row to open the Project Master Record

Project Master Record

- The Project Master Record (see next slide) contains all the key fields shown earlier on the Project Home Page as well as some additional fields, including:

  - **Location** (FIPS Code)
    - Used to identify the appropriate State Fire Marshal Regional Office
  - **CARS Cost Code**
    - This field was added at the request of DPB (contact DPB for appropriate entries)
  - **Agency Tracking Number**
    - Allows agencies to use their own project identifiers, as needed
  - **Bid Received Date**
    - Used on by BCOM to note planned Bid Receipt Dates
  - **Project Comments**
    - Used to provide brief additional clarifying remarks about the project

Example Project Master Record

Project Data	
Capital Project	⊙ Capital Project ○ Non-Capital Project
Project	Number: 16018 🔴 Name: RENOVATIONS TO THE EXECUTIVE MANSION 🔴
Sub-Project	Number: 000 🔴 Name: RENOVATIONS TO THE EXECUTIVE MANSION 🔴
Agency	194 - DEPARTMENT OF GENERAL SERVICES ▼ 🔴
Facility/Campus	--Select One-- ▼
Project Type	RESIDENTIAL ▼ 🔴
Location (FIPS Code)	RICHMOND, CITY OF [760] ▼ 🔴 SFMO: CENTRAL REGIONAL OFFICE
Alternate Authority	☐ HECO ☐ Level II ☐ Level III ☐ Independant or Non-State Entity ☐ N/A
Procurement Method	☐ Design-Bid-Build ☐ Construction Management ☐ Design-Build ☐ To Be Determined ☐ PPEA ☐ ESCO ☐ VPPA Proceed Other:
Project Group	☐ GOB; DPB CO-8 Approval Required ☐ Pool Funded Project ☐ Chapter 1 (2008 Special Ses ☐ Chapter 781 (2009) ☐ Chapter 874 (2010-2012) ☐ Chapter 890 (2011)
CARS Cost Code	
Agency Tracking Number	
Bid Received Date	☑ N/A ▦
Project Comments	**Fields with a red circle adjacent to them are "required" fields, i.e., they may not be left blank. This is typical throughout BITS.**

Agency
194
Project
16018-000
Mode
Edit
Links
Click Here
Actions
💾
Save

Links to Forms

- If an agency can't directly edit the Project Master Record, why would they want to use the Project Home Page?   Two reasons:
  1. To verify the accuracy of the Project Master Record data
  2. To quickly access existing project-related forms in BITS

"Filtering" the Project Home Page

- In BITS, "filters" are employed to help users find data
- Multiple filters can be used at the same time to display a precise and limited amount of data
- Filters are used in many places within BITS (e.g., Project Home Page, Forms Home Page, etc.)
- To access the filters, click on "Show Filter"

Project Home Page Filters

- Here are the filters available for the Project Home Page
- Each filter is described separately on subsequent slides
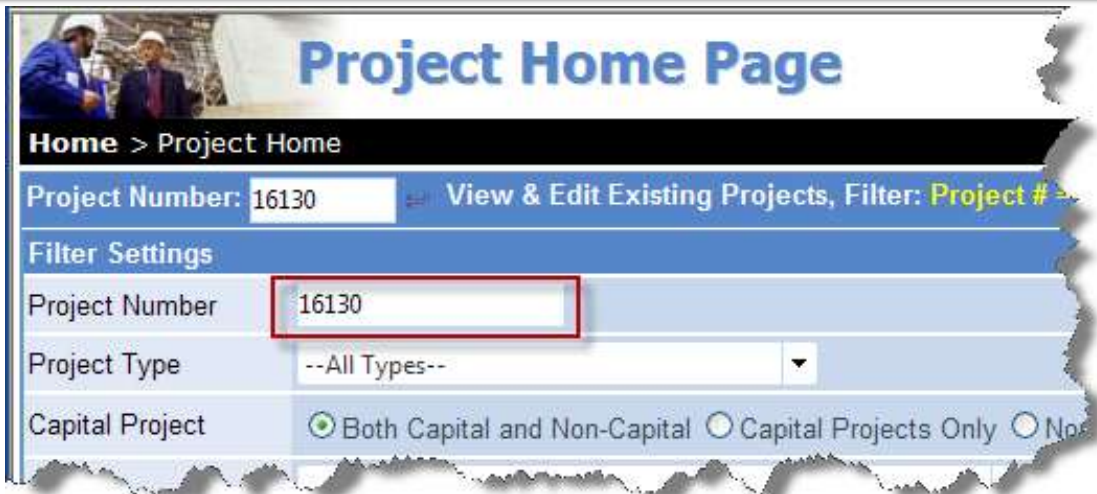
The "Project Number" Filter

Project Home Page

Home > Project Home

Project Number: 16130   View & Edit Existing Projects, Filter: Project # >

Filter Settings

Project Number   16130

Project Type   --All Types--

Capital Project   ⦿ Both Capital and Non-Capital ○ Capital Projects Only ○ No

- The Project Number filter need only contain a portion of the **project number** and/or **subproject number**
- For example:
  - -161   will return all projects* beginning with 161, for all agency codes
  - 16130   will return all subprojects for project 16130
  - 16130-001 will return only results for this specific subproject

  * - agency users can only view their own agency's projects within BITS

Hiding and Un-hiding the Filters

- To hide the filters, click on "Hide Filter"

- Hiding filters will make a larger portion of the screen available to view the results

- To make the filters visible again, click on "Show Filter"

Project Number "Quick Filter" Box

- Project numbers filters are used frequently in BITS
- To avoid having to show the full set of filters each time, a "quick filter" box was added for project nos.
- Using the "quick filter" box to specify a project number is the same as using the Project Number box in the full set of filters
- The two boxes can be used interchangeably to filter for projects

"Project Type" Filter

- Users can filter results to include all types of projects or only specific types of projects from a "pick list" of BITS project types

- When using a long "pick list", you can also type in part of the field, e.g., "DOR" to move quickly down the list

"Capital Project" Filter

- Users can filter results to include only Capital Projects, only Non-Capital Projects, or both types, by clicking on the "radio button" icons shown below

"Agency" Filter

- Central agency users (such as APA or DPB) can filter on all agencies, or on specific agencies, to view project and other form data
- Agency users can only filter on their own agency's projects and related form data

"Location" Filter

- The Location (or FIPS Code*) filter is organized alphabetically by City/County name
- Again, you can scroll down the full "pick list" or type in the first few letters to move quickly down the list

Location (FIPS Code) --All Locations--
- --All Locations--
- ACCOMACK CO. [001]
- ALBEMARLE CO. [003]
- ALEXANDRIA, CITY OF [510]
- ALLEGHANY CO. [005]
- AMELIA CO. [007]

Location (FIPS Code) ROANOKE CO. [161]
- ROANOKE CO. [161]
- ROANOKE, CITY OF [770]
- ROCKBRIDGE CO. [163]
- ROCKINGHAM CO. [165]
- RUSSELL CO. [167]
- SA
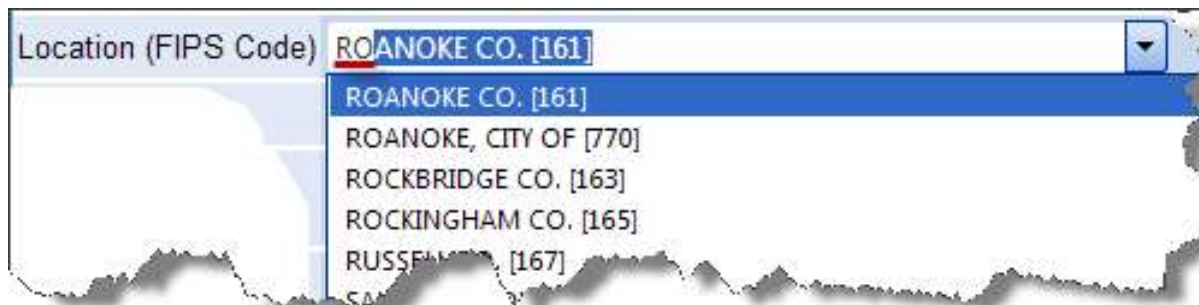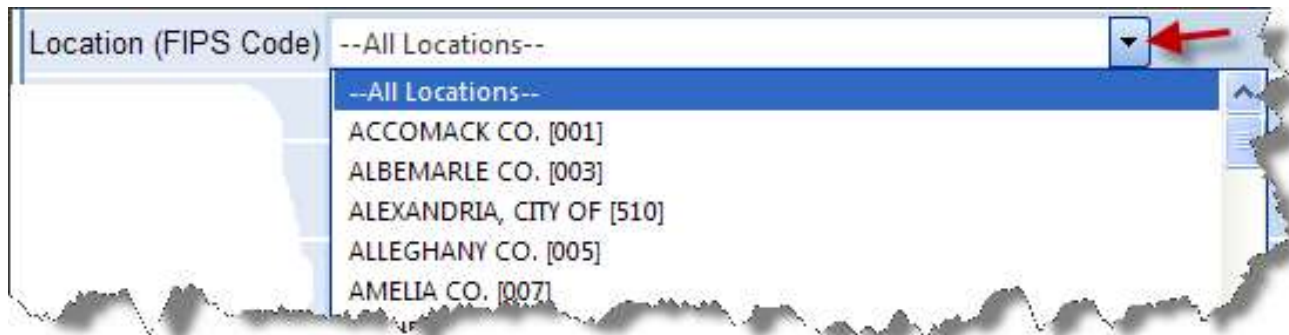
* FIPS Code = Federal Information Processing Standard Code. This is a standard numbering system used to identify localities.

"Facility/Campus" Filter

- This field was added at the request of DPB so agencies could better define the specific sub-facility or campus where a project is located
- Use the pick list button or type in the first few letters to select a specific Facility/Campus

Facility/Campus	--All Facility/Campus-- ▼

- Please note, as this is a new field to BITS, very few existing records contain this Facility/Campus data
- As such, filtering on this field will display few results
- For now, the best option is to leave the filter selection at "All"
- Once new projects are entered and appropriate data is added to this field, then the Facility/Campus filter may provide better results

Other Project Filters

- Other filters include:
  - Alternate Authority
  - Procurement Method
  - Project Group

- Use the checkboxes to filter on specific selections within each of these groupings
  - If more than one checkbox is checked <u>within a grouping</u>, BITS will search for records which meet either condition

Alternate Authority	☐HECO ☐Level II ☐Level III ☐Independant or Non-State Entity ☐N/A (If any items are checked then at least one of them must apply.)
Procurement Method	☐Design-Bid-Build ☐Construction Management ☐Design-Build ☐To Be Determined ☐PPEA ☐ESCO ☐VPPA Proc (If any items are checked then at least one of them must apply.)
Project Group	☐GOB; DPB CO-8 Approval Required ☐Pool Funded Project ☐Chapter 1 (2008 Special Session) ☐Chapter 781 (2009 (If any items are checked then at least one of them must apply.)

Using Multiple Filters
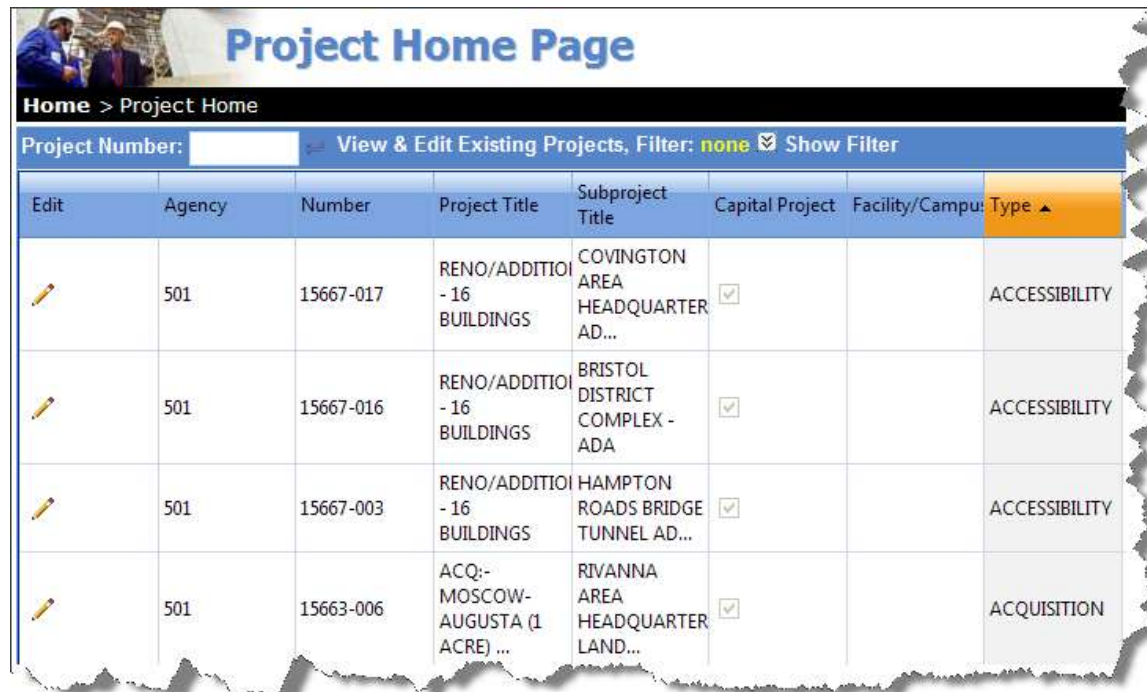
- When combining filters, BITS uses what programmers refer to as "logical AND statements"
- What this means is that the results returned must meet ALL of the specified filter conditions
- Be careful when using multiple filters. They can quickly narrow down results, however, sometimes no results will be displayed should no records meet ALL filter conditions.

(If no results appear, trying clearing all filters, and then re-specify filters one at a time.)

Sorting the Columns

- The Project Home Page may be sorted by any column
- To sort a column, click once on the column header

An upward pointing arrow icon means the column is sorted in "ascending sequence" (i.e., for numbers, from smallest to largest; for dates, from the earliest date to the latest date; for letters, from A to Z)

Sorting the Columns (cont.)

- To sort the column in "descending sequence", click once more on the column header

The downward pointing arrow icon means the column is sorted in "descending sequence" (i.e., for numbers, from largest to smallest; for dates, from the latest date to the earliest date; for letters, from Z to A)

Sorting the Columns (cont.)

- To clear the column sort, click once more on the column header

  - Notice that the column header is no longer highlighted and there is no arrow icon displayed

- To sort on another column, clear the current column from sorting as shown above

Sorting the Columns (cont.)

- BITS does allow sorting on multiple columns
  - The first column sorted becomes the primary sort
  - The second column sorted becomes the secondary sort
  - On so on, for additional columns

Adding a New Project Master Record

- A new Project Master Record may be added to BITS by clicking the "Add Project" button
- This brings up a blank record for data entry
- This is typically used for BCOM Admin Staff to add new non-cap projects
- Only BCOM Admin Staff can add projects directly

(As noted earlier, agencies add projects indirectly to BITS via the project information they include within a BITS CO or BO form.)

Building Information Tracking System

Viewing, Creating, Editing, Processing and Printing BO and CO Forms

Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management

Forms Home Page

- The Forms Home Page may be used by authorized BITS users to:
  - Locate an existing form to:
    - **View** the form data
    - **Edit** the form data (if the form is in the user's "Workflow Step")
    - **Approve and submit** the form (if form is in the user's "Workflow Step")
  - **Create a new blank form from scratch**
  - **Create a new blank form by copying from an existing form**
    - In using this feature, any common data fields are copied from the existing form into a new form (i.e., this will allow existing data such as project name, project number, budget, scope, etc. to be copied from the existing form into the new form
    - The forms do not need to be of the same form type (e.g., you can use an existing CO-2 to create a new CO-2, a new CO-4, etc.)

Forms Home Page

- The "Forms Home Page" can be accessed from the BITS Home Page:
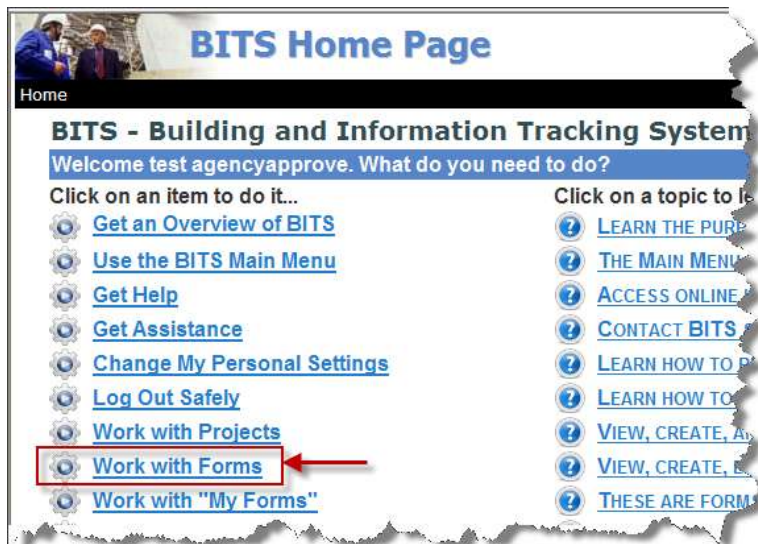
or from the BITS Main Menu:
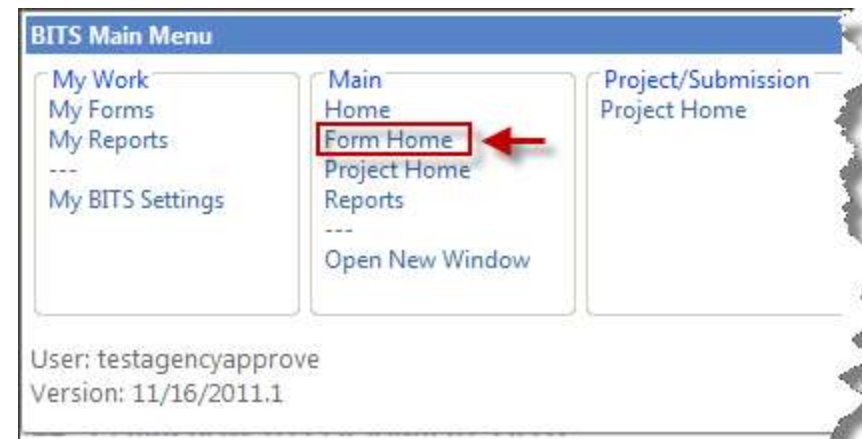
Forms Home Page

- Following is an example Forms Home Page (with filters hidden)
- Each row provides key fields from an individual form stored in BITS
- To open the complete form, double-click anywhere on its row

Forms Home Page

- Following is an example Forms Home Page (<u>with filters shown</u>)
- The area encircled by the red box below is the filter area
- Filters are explained in more detail on subsequent pages

"Filtering" the Forms Home Page

- In BITS, "filters" are used to allow the user to select which forms to list on the Forms Home Page
- Multiple filters can be used to list a very limited number of forms
- To access the filters, click on "Show All Filter Settings"

Hiding and Un-hiding the Filters

- To hide the filters, click on "Hide Filter"

- Hiding filters will make a larger portion of the screen available to view the listing of forms which match the filter criteria

- To make the filters visible again, click on "Show All Filter Settings"

Forms Home Page Filters

- Below are the filters available for the Forms Home Page

Agency	--All Agencies--	Active Role	--All Roles--
Project Number	16130	Form Type	--All Forms--
Agency Tracking Number		Status	--All (All/Any Status)--
Building Name		Work Permitted	
Submit Date	--All Dates--	Close Out Dispensation	--All Close Out Dispensations--

- Each filter is discussed individually on subsequent slides
- With filters, users may select, for example:
  - All forms for a selected subproject
  - Only CO-2 forms for a selected project
  - The current processing status of all their agency's Building Permits
  - … and many other selection variations
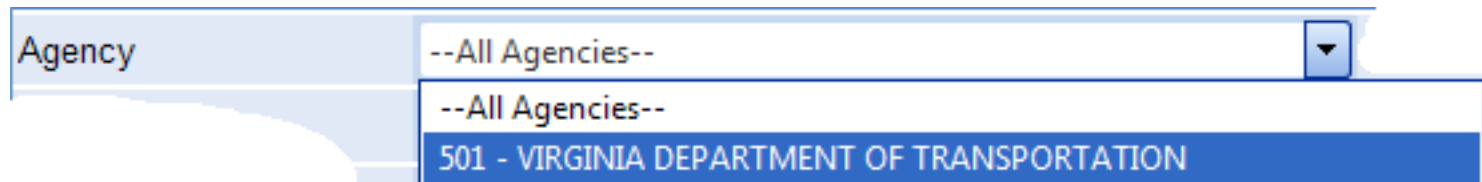
The "Agency" Filter

- Central agency users (such as APA and DPB) can filter on all agencies, or on specific agencies, to view project form data

Agency	--All Agencies-- ▼
	417 - GUNSTON HALL PLANTATION
	423 - DEPT OF HISTORIC RESOURCES
	425 - JAMESTOWN-YORKTOWN FOUNDATION
	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION

- The Agency users submitting the forms may only filter the Forms Home Page to locate their own agency's projects and form data

Agency	--All Agencies-- ▼
	--All Agencies--
	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION
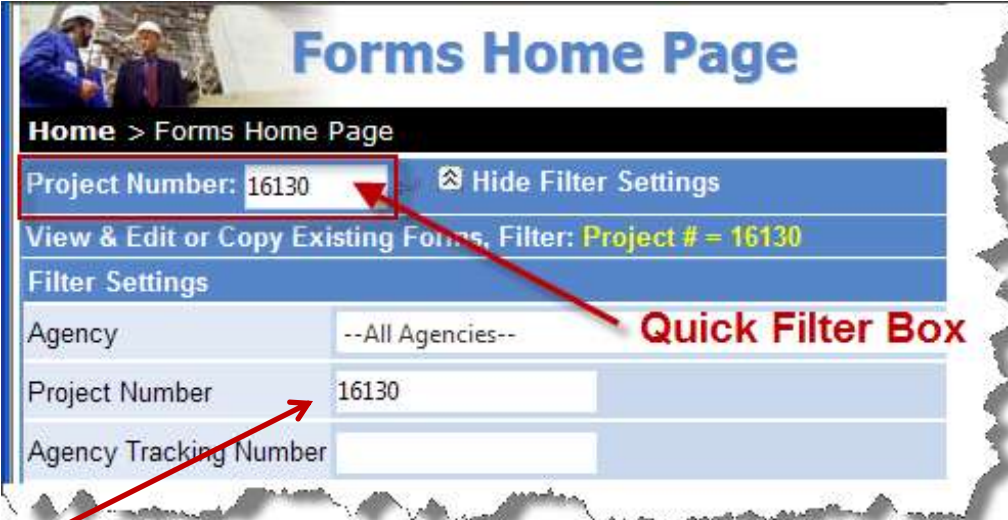
The "Project Number" Filter

Filter Settings	
Agency	--All Agencies--
Project Number	**16130**
Agency Tracking Number	
Building Name	

- The Project Number filter need only contain a portion of the **project number** and/or **subproject number**
- For example:
  - -161   will return all projects beginning with 161
  - 16130   will return all subprojects for project 16130
  - 16130-001 will return only results for this specific subproject

Project Number "Quick Filter" Box

- Project number filters are used frequently in BITS
- To avoid having to show the full set of filters each time, a "quick filter" box was added for project nos.
- Using the "quick filter" box to specify a project number is the same as using the Project Number box in the full set of filters
- The two boxes can be used interchangeably to filter for projects

Project Number "Quick Filter" Box

After entering a new project number, press here to apply the Quick Filter.

Forms Home Page

Home > Forms Home Page

Project Number: 16130 ☑ Show All Filter Settings

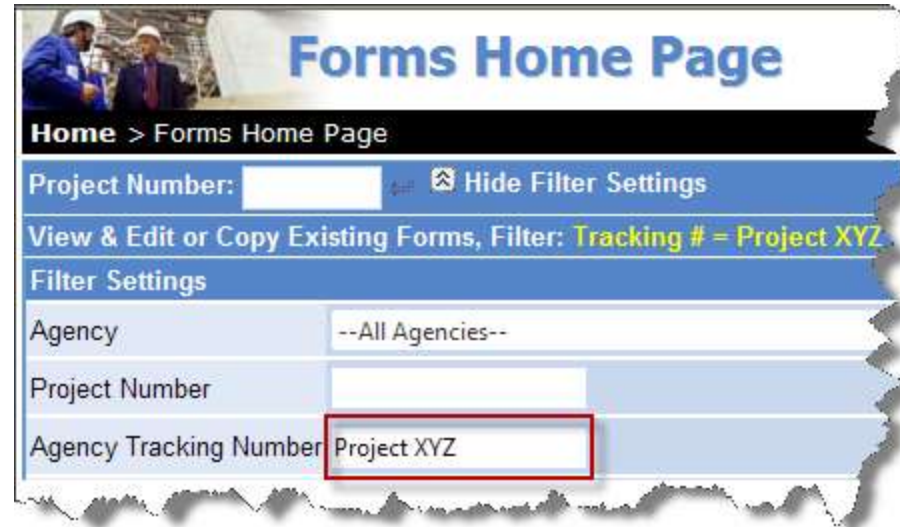View & Edit or Copy Existing Forms, Filter: **Project # = 16130**

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type
✏	🖶	--Select▼	501	16130-001		CARLISLE AHQ SERVICE/WA FAC	CO-17
✏	🖶	--Select▼	501	16130-001		CARLISLE AHQ SERVICE/WA FAC	CO-17
✏	🖶	--Select▼	501	16130-001		CARLISLE AHQ SERVICE/WA FAC	CO-17

As you can see, the Project Number Quick Filter is available, even though the other filters are hidden.

CAUTION:
Although they are hidden, the settings of the other filters are still in effect.

"Agency Tracking Number" Filter

- In certain instances, agencies may wish to add their own project identifier which may differ than the BCOM-assigned or Appropriation Act-assigned project numbers

- If an agency chooses to add their own Agency Tracking Number when creating a form, they may later filter on it to locate the form

The Tracking Number field is provided solely as a convenience for use by the agencies.   It is not managed by BCOM.

The field is an unformatted format alphanumeric field (i.e., agencies can use any mix of numbers or text to create their unique project identifiers).

"Building Name" Filter

- The Building Name field is used on Building Permits and Certificates (BO Forms)

- The associated filter field is a "free-format" field, meaning anything can be entered. Use caution when filtering on this field. For example "Halsy Hall" will not find "Halsey Hall", but filtering on "Hal" will find both Halsy and Halsey Hall.
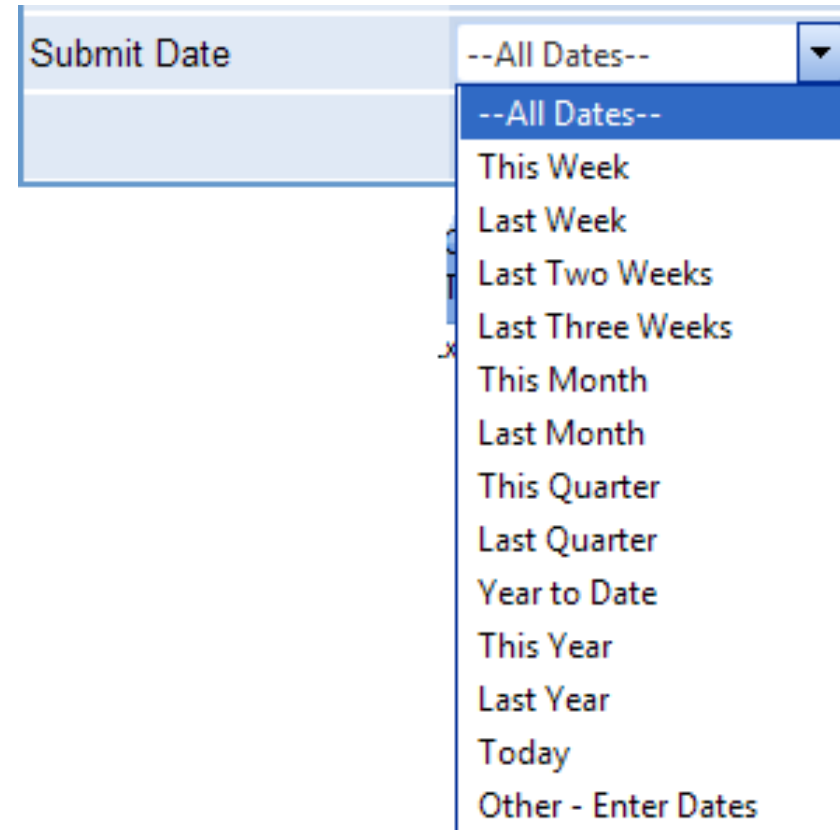
Filter Settings	
Agency	--All Agencies--
Project Number	
Agency Tracking Number	
Building Name	Halsey

"Submit Date" Filter

- The Submit Date is the date that a form was submitted by an agency to BCOM

- Using the pick list for the associated filter, the user can select "All Dates" or pick from various pre-specified date ranges, or enter a custom date range by choosing "Other – Enter Dates" and then entering a specific start date and a specific end date

Submit Date	--All Dates-- ▼
	--All Dates--
	This Week
	Last Week
	Last Two Weeks
	Last Three Weeks
	This Month
	Last Month
	This Quarter
	Last Quarter
	Year to Date
	This Year
	Last Year
	Today
	Other - Enter Dates

"Form Type" Filter

- With the "Form Type" filter field, the user can choose:
  - All forms
  - BO forms only (i.e., only Permits and Certificates)
  - CO forms only, or
  - Any specific type of form (e.g., CO-2, CO-17 IND, etc.)

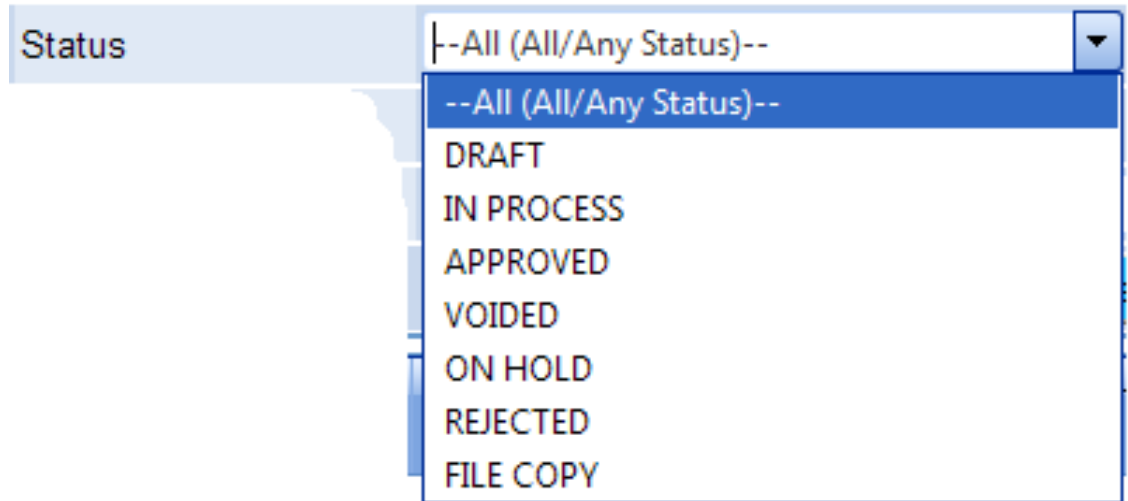| Form Type	--All Forms--
--All Forms--	
All CO Forms	
All BO Forms	
CO-2, Authority to Initiate Capital Outlay Project	
CO-3, A/E Contract Log	
CO-4, Application for Approval of Schematic Design	
CO-5, Application for Approval of Preliminary Design	
CO-6, Application for Approval of Working Drawings & Specifications	CO Forms
CO-8, Approval to Award Construction Contract	
CO-11, Construction Change Order Log	
CO-14, Project Completion Report	
CO-17, Building Permit for Construction	
CO-17 IND, Building Permit for an Industrialized Building	
CO-17 MAN, Building Permit for a Manufactured Home	
CO-17 TWR, Building Permit for an for a Tower	
CO-17 TMP, Building Permit for a Temporary Structure	
CO-17 SPC, Special Use Permit	BO Forms
CO-13.3, Certificate of Use and Occupancy	
CO-13.3 IND, Certificate of Use and Occupancy for an Industrialized Building	
CO-13.3 MAN, Certificate of Use and Occupancy for a Manufacturered Home	
CO-13.3 TWR, Certificate of Use and Occupancy for a Tower	
CO-13.4, Building Permit Close Out	

"Status" Filter

- In BITS the "Status" identifies the stage of the form in the workflow process, or the final disposition of the form

- See the next slide for a description of each Status identifier

Status	--All (All/Any Status)-- ▼
	--All (All/Any Status)--
	DRAFT
	IN PROCESS
	APPROVED
	VOIDED
	ON HOLD
	REJECTED
	FILE COPY

Form Status

- DRAFT — form is being composed by the Agency

- IN PROCESS – form has been submitted by Agency and is now being processed by BCOM and/or DPB

- APPROVED – form has been approved

- VOIDED – form processing has been terminated

- ON HOLD – form processing has been temporarily suspended
  (usually means "awaiting additional information")

- REJECTED – form was not approved

- FILE COPY – the status shown for the CO-3 and CO-11 logs
  (these two logs are "view-only")

Forms Status / Workflow

- "Form Status" indicates, at a summary level, to which stage of processing a form has progressed in the forms processing workflow:

Workflow Steps:

Agency Form Creator (Draft Step)	→	Agency Form Approver (Agency Step)	→	BCOM (Admin, Lead Reviewer and Director steps)	→	DPB (DPB Analyst and Section Mgr. steps) *	→	Distributed

Form Status:

DRAFT	IN PROCESS	APPROVED or REJECTED

Any agency user having "Can Create/Edit" rights, as approved by their BITS Agency Access Coordinator, may draft a form; however, the form may only be submitted by agency users having "Can Approve/Submit" rights.

While a form is "IN PROCESS", it is routed for processing thru various BCOM staff for action.

* - DPB Agency Analysts and Section Managers are in the workflow for processing CO-2 forms and certain CO-8 forms.

"ON HOLD" is a special "IN PROCESS" status. "ON HOLD indicates that processing has been temporarily suspended. (Usually means BCOM awaiting additional information from the agency or AE).

"Work Permitted" Filter
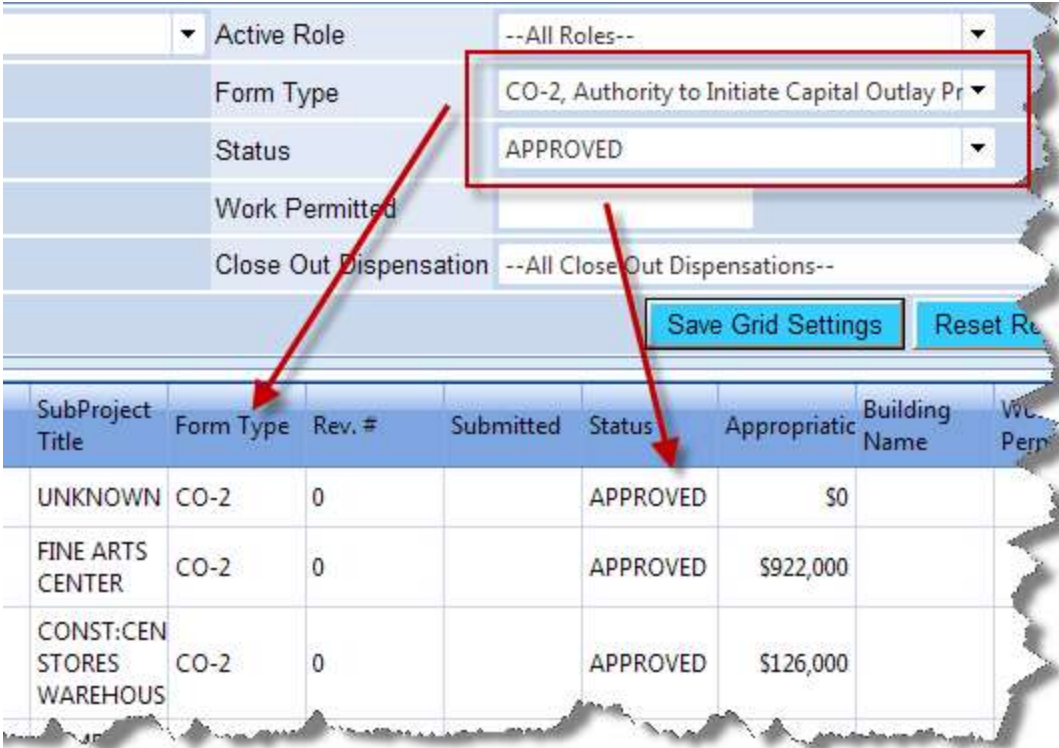
- The Work Permitted field is used primarily on BO Forms
- It may include items such as "Foundation Only", "Full Building", "Early Sitework Package", etc.
- Any portion of the text may be entered in the filter, e.g., entering "Full" in the filter field should bring results similar to those shown below

Using Multiple Filters

- When combining filters, BITS uses what programmers refer to as "logical AND statements"
- What this means is that the results returned must meet ALL of the specified filter conditions
- Be careful when using multiple filters. They can quickly narrow down results, however, no form results will be displayed if no forms meet ALL the specified filter conditions.
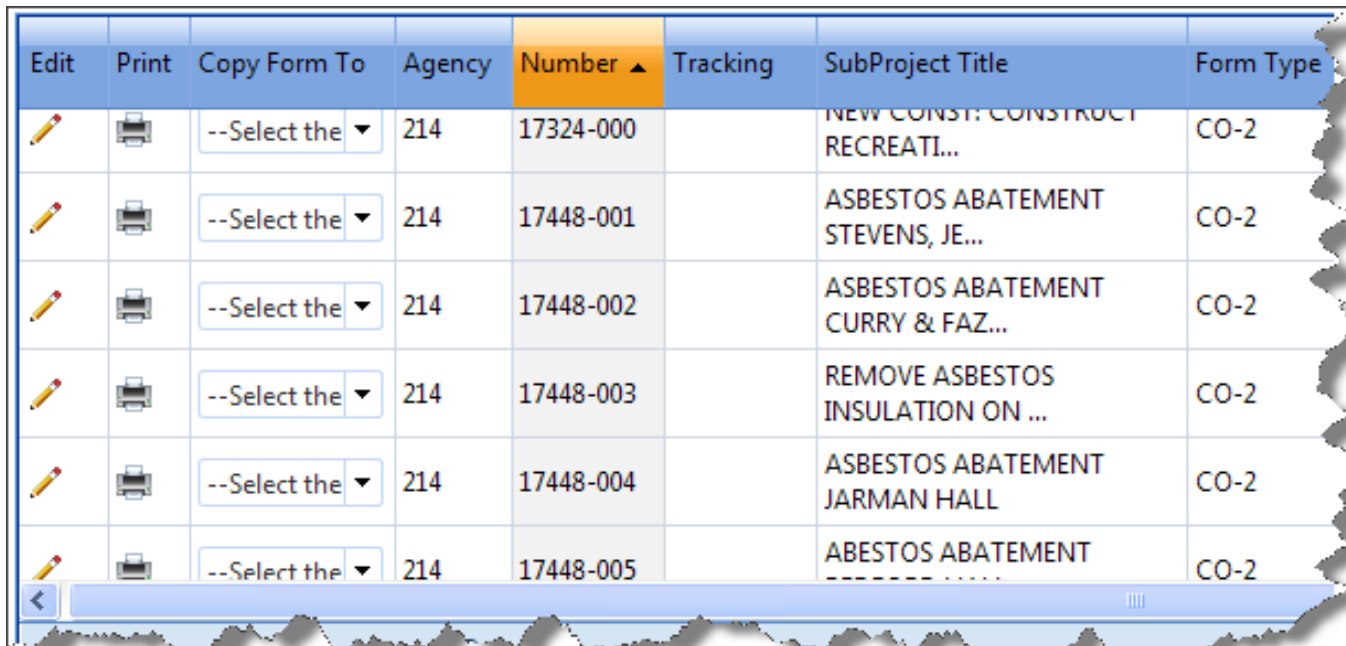
SubProject Title	Form Type	Rev. #	Submitted	Status	Appropriatic	Building Name	Wc Perr
UNKNOWN	CO-2	0		APPROVED	$0		
FINE ARTS CENTER	CO-2	0		APPROVED	$922,000		
CONST:CEN STORES WAREHOUS	CO-2	0		APPROVED	$126,000		

In the example above, the filtered results list only those forms which match both filters, i.e., "CO-2" AND "Approved".

(If no results appear, trying clearing all filters, and then re-specify filters one at a time.)

Sorting the Columns

- The Form Home Page may be sorted by any column
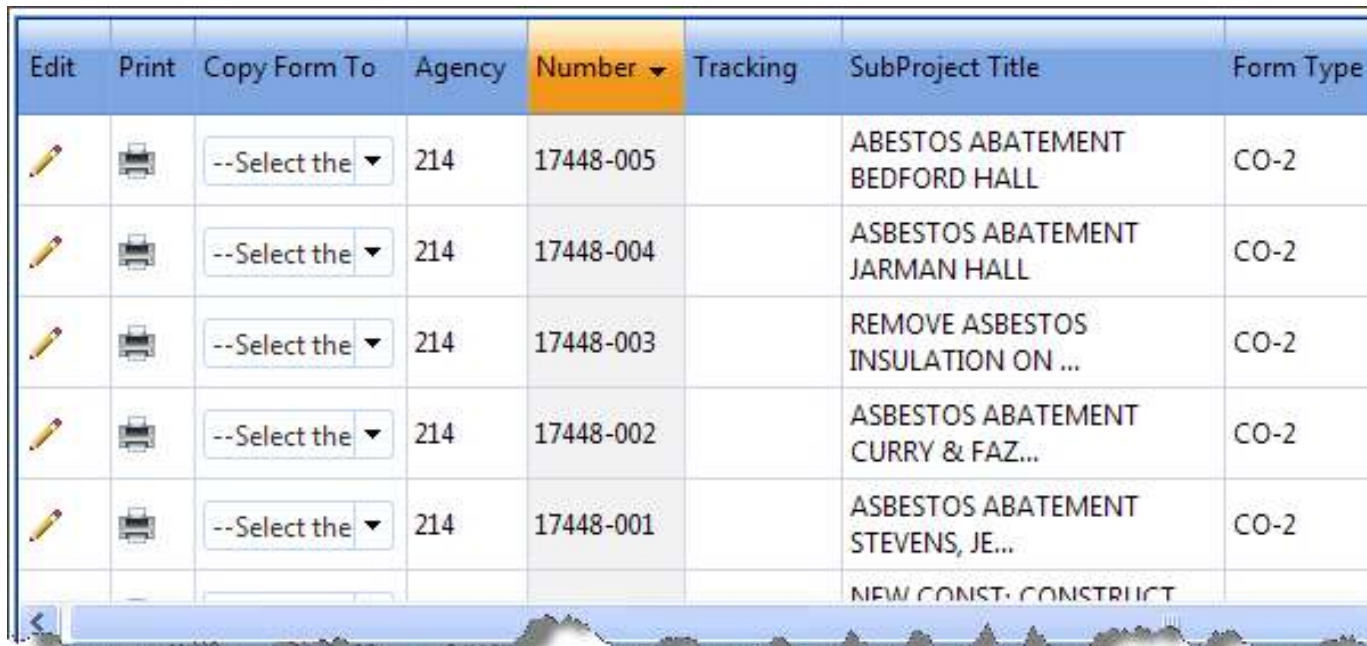- To sort a column, click once on the column header

Edit	Print	Copy Form To	Agency	Number ▲	Tracking	SubProject Title	Form Type
✏	🖨	--Select the ▼	214	17324-000		NEW CONST: CONSTRUCT RECREATI...	CO-2
✏	🖨	--Select the ▼	214	17448-001		ASBESTOS ABATEMENT STEVENS, JE...	CO-2
✏	🖨	--Select the ▼	214	17448-002		ASBESTOS ABATEMENT CURRY & FAZ...	CO-2
✏	🖨	--Select the ▼	214	17448-003		REMOVE ASBESTOS INSULATION ON ...	CO-2
✏	🖨	--Select the ▼	214	17448-004		ASBESTOS ABATEMENT JARMAN HALL	CO-2
✏	🖨	--Select the ▼	214	17448-005		ABESTOS ABATEMENT	CO-2

An upward pointing arrow icon means the column is sorted in "ascending sequence" (i.e., for numbers, from smallest to largest; for dates, from the earliest date to the latest date; for letters, from A to Z)

Sorting the Columns (cont.)

- To sort the column in "descending sequence", click once more on the column header
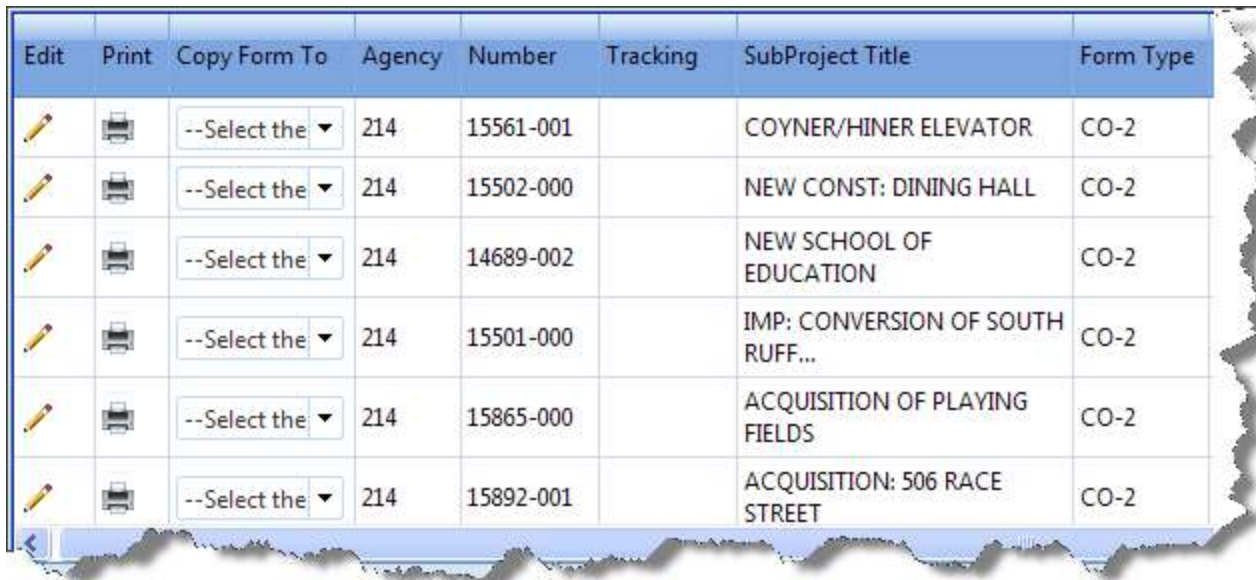
Edit	Print	Copy Form To	Agency	Number ▾	Tracking	SubProject Title	Form Type
✏	🖨	--Select the ▾	214	17448-005		ABESTOS ABATEMENT BEDFORD HALL	CO-2
✏	🖨	--Select the ▾	214	17448-004		ASBESTOS ABATEMENT JARMAN HALL	CO-2
✏	🖨	--Select the ▾	214	17448-003		REMOVE ASBESTOS INSULATION ON ...	CO-2
✏	🖨	--Select the ▾	214	17448-002		ASBESTOS ABATEMENT CURRY & FAZ...	CO-2
✏	🖨	--Select the ▾	214	17448-001		ASBESTOS ABATEMENT STEVENS, JE...	CO-2
						NEW CONST: CONSTRUCT	

The downward pointing arrow icon means the column is sorted in "descending sequence" (i.e., for numbers, from largest to smallest; for dates, from the latest date to the earliest date; for letters, from Z to A)

Sorting the Columns (cont.)

- To clear the column sort, click once more on the column header
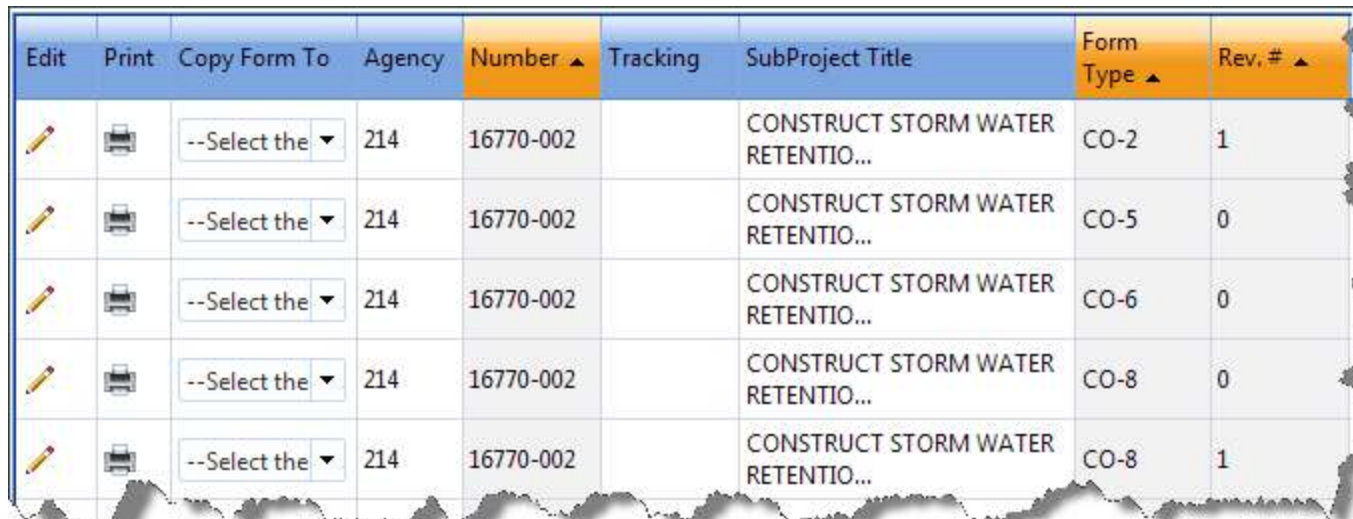 - Notice that the column header is no longer highlighted and no arrow icon displayed

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type
✏	🖨	--Select the ▼	214	15561-001		COYNER/HINER ELEVATOR	CO-2
✏	🖨	--Select the ▼	214	15502-000		NEW CONST: DINING HALL	CO-2
✏	🖨	--Select the ▼	214	14689-002		NEW SCHOOL OF EDUCATION	CO-2
✏	🖨	--Select the ▼	214	15501-000		IMP: CONVERSION OF SOUTH RUFF...	CO-2
✏	🖨	--Select the ▼	214	15865-000		ACQUISITION OF PLAYING FIELDS	CO-2
✏	🖨	--Select the ▼	214	15892-001		ACQUISITION: 506 RACE STREET	CO-2

- To sort on another column, clear the current column from sorting as shown above

Sorting the Columns (cont.)

- BITS does allow sorting on multiple columns
  - The first column sorted becomes the primary sort, the second column sorted becomes the secondary sort, and so on for additional columns

Edit	Print	Copy Form To	Agency	Number ▲	Tracking	SubProject Title	Form Type ▲	Rev. # ▲
✏	🖶	--Select the ▼	214	16770-002		CONSTRUCT STORM WATER RETENTIO...	CO-2	1
✏	🖶	--Select the ▼	214	16770-002		CONSTRUCT STORM WATER RETENTIO...	CO-5	0
✏	🖶	--Select the ▼	214	16770-002		CONSTRUCT STORM WATER RETENTIO...	CO-6	0
✏	🖶	--Select the ▼	214	16770-002		CONSTRUCT STORM WATER RETENTIO...	CO-8	0
✏	🖶	--Select the ▼	214	16770-002		CONSTRUCT STORM WATER RETENTIO...	CO-8	1

In this example, we sorted on Project Number first, Form Type second, and Rev # third. Please note the left-to-right position of the columns has no bearing on the order in which they are sorted, rather it is the sequence in which the sorts are applied that determine which is the primary sort, which is the secondary sort, and which is the tertiary sort.

Changing "Grid" Settings

- Please refer to the screenshot on the next slide
- The user may vary the column widths in the grid which displays the various forms
- To resize the columns, first click on "Show All Filter Settings"
- Next, hover over the dividing line between two column headers until the cursor appears as a double-headed arrow.
- At that point hold down the left mouse button and drag the mouse to resize the column width. When the desired width is obtained, release the mouse button.
- Repeat the above steps to resize additional columns
- Once all desired column widths are obtained, click on the "Save Grid Settings" command button
- To return columns to their defaults widths, click on the "Reset Results Grid" command button.

Resizing Columns in the Grid

- In the example below, the double-headed arrow cursor is located between the "SubProject Title" column and the "Form Type" column. Holding down the left mouse button and dragging the cursor icon will resize the column to the left. In this example the "SubProjectTitle" column will be resized.

Adding a New Form

- **There are two ways to create a new form in BITS**
  - Copy an existing form to create a new form
  - Add a new empty form

IMPORTANT

- **The "copy to" method** is highly recommended if another form for the project already exists in BITS. Using this method can save the user data entry time and help assure data is accurate and consistent
  - The form types may be different, e.g., you can copy from an existing CO-2 to start a new CO-2, a new CO-4, a new CO-8, etc.; you can use an existing CO-17 to begin to create a new CO-17, a new CO-13.3, etc.
  - The data copied from the source form into the new form can be edited as needed within the new form
  - The edits made within the new form do not affect source form's data

- **The "add a new empty form" method** will provide a form with ALL fields initially blank
  - The use must enter all data from scratch

Adding a New Empty Form

- To load a new empty (blank) form, click on the arrow show below:

- Then select from the list of available form types:
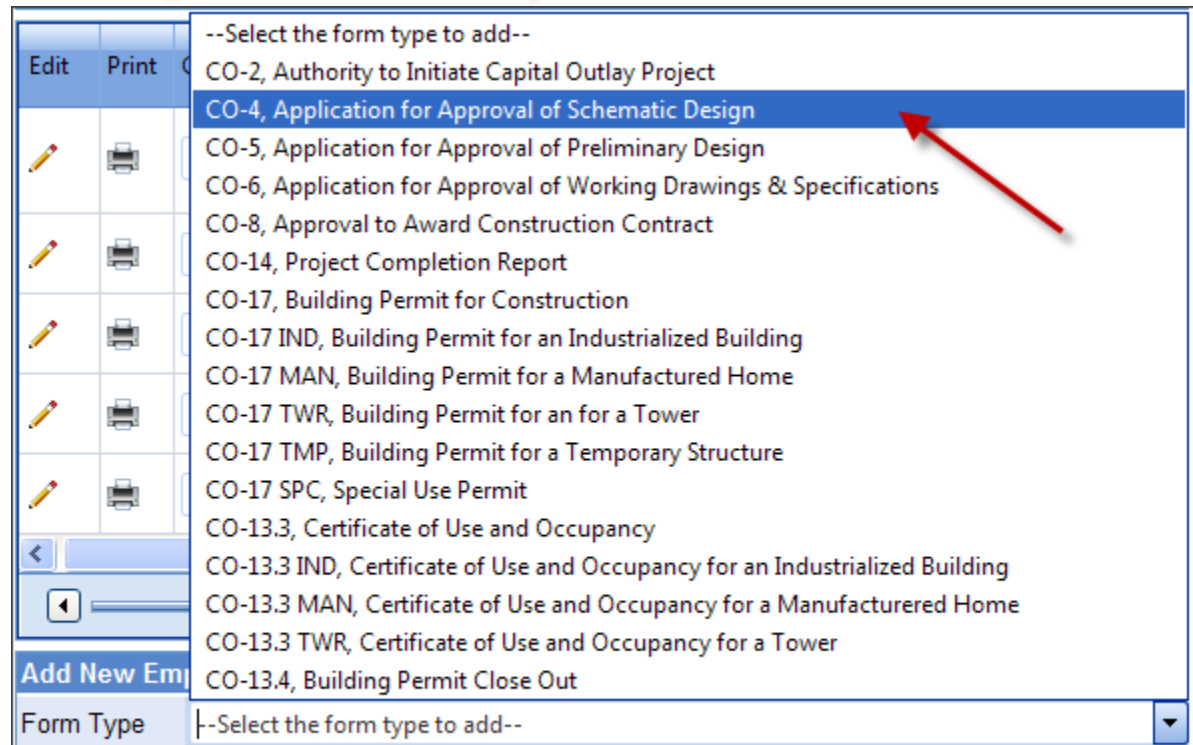
Adding a New Empty Form

- The new blank form may now be filled in, saved, and submitted

Copying from an Existing Form to create a New Form

- First find the existing form to use as the source for the new form
- Once source form is located, click on the arrow icon in the "Copy Form To" column:
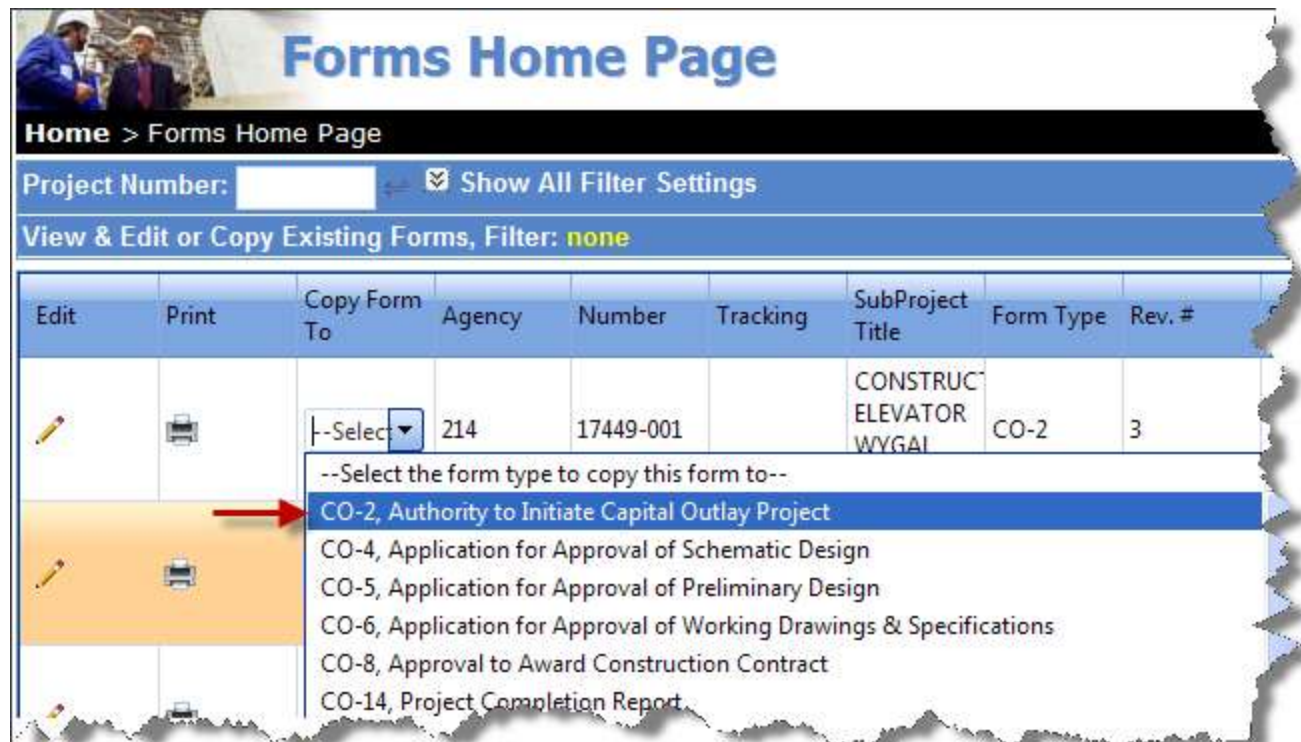
Copying from an Existing Form to create a New Form

- From the resulting pick list, choose the type of new form you wish to create
- Forms need not be of the same type
- Existing data the source form will be copied into any common data fields in the new form. (This can save the user considerable data entry time.)
- The data in the new form may then be edited, without affecting the source form's data

Forms

- The BITS "Form Home Page" and the BITS "My Forms" page (discussed later) are <u>just a means to locate a specific form</u> in BITS the user wishes to view, edit, submit or print
- The next several slides discuss the forms themselves
- Users who have completed the Excel versions of BCOM's CO forms and BO forms should have little difficulty in completing the BITS versions of these forms
- The data required is essentially unchanged from the Excel versions, with the exception of a few additional fields
- Users who need assistance are advised to submit a help request to bits@dgs.virginia.gov and a BCOM administrative staff member or lead reviewer will be assigned to assist the user in completing the form

Understanding the Form Page – The Status Panel

- The left panel of every BITS form identifies the:
  - Agency Number
  - Project number
  - Type of Form
  - Form Revision Number
  - Form Status
- It also provides quick links to other CO and BO forms for the selected project
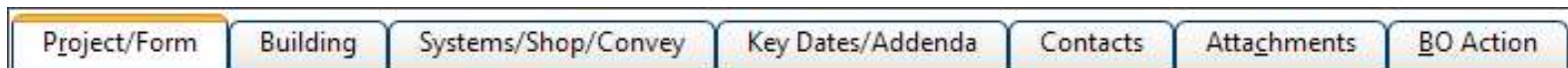- Form Actions, such as:
  - Save
  - Delete
  - Print

Revision numbers not assigned until a form has been approved.

Understanding the Forms Page – The Tab Bar

- The top of every form has a set of tabs, on which the user clicks, to access the various sections of form

- Tabs were used to group form data into sections, rather than requiring users to scroll down long pages for inputting or viewing data. (Printed forms, however, retain the familiar formatting.)

- On "CO" forms, the tabs/form sections are grouped as follows:

Project/Form	Funds	Budget Sum.	Budget Details	Scope & Sched.	Attachments	Approvals	Actions

- On "BO" forms, the tabs/form sections are grouped as follows:

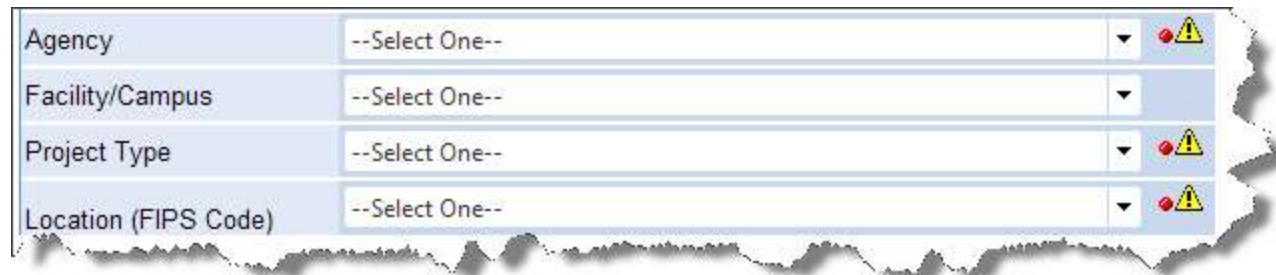| Project/Form	Building	Systems/Shop/Convey	Key Dates/Addenda	Contacts	Attachments	BO Action
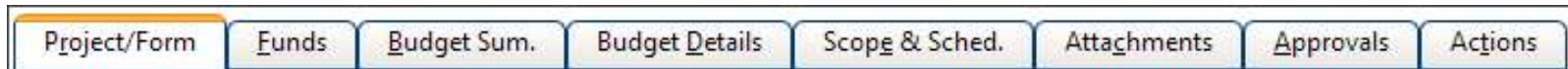
"CO" Form Tabs

- ## Project/Form tab

  - ### This tab contains basic information about the project such as:

    - Project Number & Name, Sub-Project Number & Name, Project Type, Procurement Method, Approving Authority, Agency Tracking Number, and other general project information

Fields with a red icon adjacent to them are "required fields". The form may be SAVED with these fields blank, but it may not be SUBMITTED until these fields are completed. Refer to next slide for more information on required fields.

More About Required Fields

- If the agency user tries to <u>submit</u> a form containing blank data in any "required fields", errors will be generated. The fields which must be corrected will be flagged with the icons shown below.

- Additionally, at the bottom of the form, a listing of the validation errors will be provided to identify the fields which must be corrected and to identify on which form tab the fields reside.

"CO" Form Tabs

- ## Funds tab
  - This tab identifies funding information from the Appropriation Acts and other sources and "commitments" to other project phases

"CO" Form Tabs

- <u>Funds tab</u> (cont.)

  - Funding sources may be added by clicking on the Add button or edited by clicking on the pencil icon

Project Funds (List both available and proposed funds)					
			Add		
	Edit	Item Number	Chapter No	Chapter Date	Fund
Appropriation Act	✏	C-69	N/A	92-94	GENERA
	✏	N/A	N/A	97	OTHER
	✏	N/A	N/A	98	OTHER

  - In BITS, funding information may only be added/edited on a CO-2 form AND only for the "000" subproject (i.e., for the full 5 digit project, and not for sub-projects)

  - On all other form types (and on all subjobs other than "000") funding information is displayed from the latest approved CO-2 and is provided for information only

"CO" Form Tabs

- ## Budget Summary tab

  - The Budget Summary tab identifies the key cost categories

    - The categories marked with a "D" below are direct-entered here by the user
    - The categories marked with a "C" are system-calculated total fields
    - The other three fields shown below are totals carried forward from the Budget Details tab

Cost Summary *(All percentages are based upon the construction Cost)*			
Acquisition Cost	D	$0	
Building & Built-in Equipment	D	$2,554,000	100.00 %
Sitework & Utility Construction	D	$0	0.00 %
Construction Cost	C	$2,554,000	
Design & Related Services		$0	0.00 % (Itemized on Budget Detail Tab)
Inspection & Testing Services		$0	0.00 % (Itemized on Budget Detail Tab)
Project Management & Other Costs		$0	0.00 % (Itemized on Budget Detail Tab)
Furnishings & Movable Equipment	D	$0	0.00 %
Construction Contingency	D	$0	0.00 %
Project Cost	C	$2,554,000	

"CO" Form Tabs

- **Budget Details tab**
  - This tab is for itemizing the following cost categories:
    - Design & Related Services
    - Inspection & Testing Services
    - Project Mgmt & Other Costs

  - The totals for each of these itemized categories is carried forward to the Budget Summary tab, described earlier
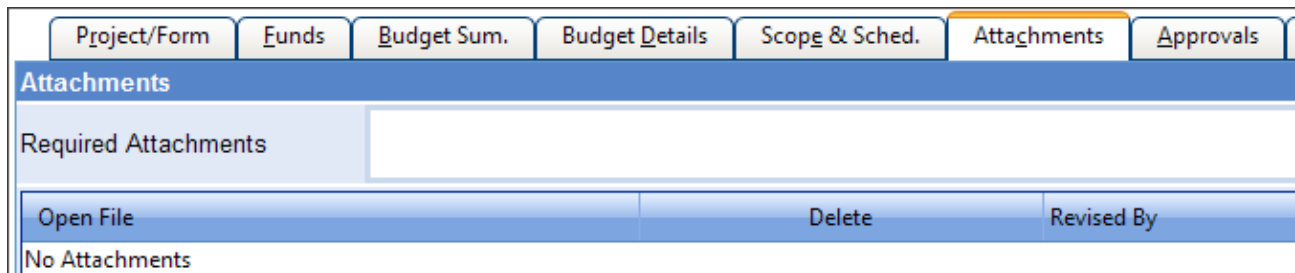
"CO" Form Tabs

- ## Scope & Schedule tab
  - ### This tab provides:
    - New scope (SF)
    - Renovated scope (SF)
    - Key Quantity:
      - Use to enter a key qty, other than SF for project
      - e.g., for Dorms – enter # of beds; for a Chiller Replacement – enter # of tons of cooling; etc.
    - Names of the A/E firm and Contractor, when known
    - Key project schedule dates

"CO" Form Tabs

- ## Attachments tab

  - Supplemental documents, at this point in time, may only be uploaded into BITS by BCOM staff members

  - Agencies should continue to submit any supporting documents for CO forms, such as bid tabs for CO-8s, to BCOM's coforms@dgs.virginia.gov e-mail address, as per current practice

  - Any supporting documents which are pertinent to the processing of a CO form will be uploaded by BCOM staff to BITS, as needed
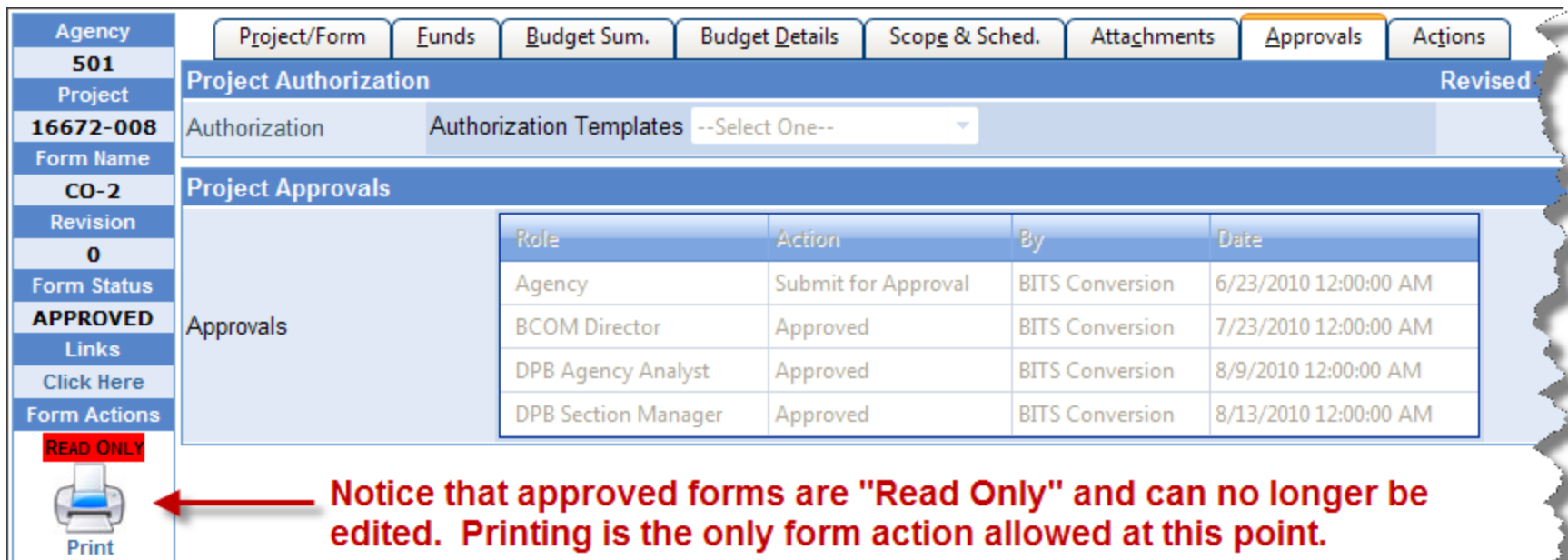
"CO" Form Tabs

- ## Approvals tab

  - The approvals tab contains the authorization or "action wording" for a CO form

  - It also identifies who approved the form and when the approvals were made

Agency								
501	Project/Form	Funds	Budget Sum.	Budget Details	Scope & Sched.	Attachments	Approvals	Actions

Project Authorization   Revised

| | Authorization | Authorization Templates --Select One-- ▼ | | |

Project Approvals

	Role	Action	By	Date
Approvals	Agency	Submit for Approval	BITS Conversion	6/23/2010 12:00:00 AM
	BCOM Director	Approved	BITS Conversion	7/23/2010 12:00:00 AM
	DPB Agency Analyst	Approved	BITS Conversion	8/9/2010 12:00:00 AM
	DPB Section Manager	Approved	BITS Conversion	8/13/2010 12:00:00 AM

Agency
501
Project
16672-008
Form Name
CO-2
Revision
0
Form Status
APPROVED
Links
Click Here
Form Actions
READ ONLY
Print

Notice that approved forms are "Read Only" and can no longer be edited. Printing is the only form action allowed at this point.

"CO" Form Tabs

- **A note regarding "converted" CO form data:**
  - The previous version of BCOM's BITS database contained only key form data; not the complete form data that is now contained in this new version of BITS
  - As the "converted" forms in BITS provide only partial data, the users should refer to their hard copies or pdf copies of the earlier CO forms to view the complete data for any forms processed prior to this version of BITS
  - The converted data is provided in BITS only for user convenience, to:
    - identify that a prior form version was processed earlier
    - to assist users in creating new forms using any available existing data
  - The converted forms do not identify specific individual approvals, but rather shows "BITS Conversion" in the "By" field (see previous slide)
  - For new forms created within the new version of BITS, the specific users' names will be shown in the "By" field when they approve the form. The new forms created within BITS are considered record copies; any "converted forms" displayed within BITS are not record copies. Refer to the originals.

"CO" Form Tabs

- ## Actions tab

  - This tab is for BCOM administrative use

  - It provides a brief summary of the approval action(s) for the form

"BO" Form Tabs

- ## Project/Form tab
  - For BO forms, the data required in the "Project" section is identical to that described earlier for the CO form's Project/Form tab
  - The "Form Data" section at the bottom of this tab, requires additional information such as the Building Name and Street Address

Again, any fields with red dots adjacent to them are "required" fields. It is not necessary they be completed before SAVING the form, but they must have entries made before SUBMITTING the form to BCOM.

"BO" Form Tabs

- ## Building tab

  - This tab contains information on relevant building codes, accessibility standards, and other descriptive information about the building or structure

"BO" Form Tabs

- ## System/Shop/Convey tab

  - This tab is for used to provide information regarding building fire protection, security, and conveying systems

  - On some BO forms, information regarding shop drawing approval responsibilities is also included on this tab

"BO" Form Tabs

- **Key Dates/Addenda**
  - Key certification, inspection, and report dates are entered on this tab
  - If an item is not applicable, check the adjacent "N/A" checkbox

"BO" Form Tabs

- ## Contacts tab

  - This tab is used to provide contact information for the agency, the A/E, contractor, and special inspectors

  - This tab is also used to provide licensing information about the A/E and contractor

"BO" Form Tabs

- Attachments tab

  - Supplemental documents may, at this point in time, only be uploaded into BITS by BCOM staff members

  - Agencies should continue to submit any supporting documents for BO forms, such as equipment layouts and certificates of flame resistance, for CO-17 TMP tent permits to BCOM's boforms@dgs.virginia.gov e-mail address, as per current practice

  - Any supporting documents which are pertinent to the processing of a BO form will be uploaded by BCOM staff to BITS, as needed

Project/Form	Building	Systems/Shop/Convey	Key Dates/Addenda	Contacts	Attachments	BO Action

Attachments				Revised By
Required Attachments				
Open File		Delete	Revised By	
No Attachments				

"BO" Form Tabs

- BO Action
  - This tab provides the effective date and, if applicable, the revision and expiration date of permits and certificates
  - This tab is also where the Building Official action wording and approvals are located

Agency Form Actions

- An agency user, who has the appropriate rights or permissions, may execute these "Form Actions":

  - **Print**
    - Forms can be printed at any time
    - Printing is discussed in more detail in later slides

  - **Delete**
    - A form may be deleted by the agency users ONLY when the form is in the DRAFT Form Status (i.e., recall the DRAFT status means a form is being composed by the agency and has yet to be submitted to BCOM. Once form is submitted to BCOM, the submitting agency can no longer delete it.)

  - **Save**
    - There are several Save options which are discussed on the next several slides

Agency
501
Project
13300-009
Form Name
CO-6
Revision
-
Form Status
DRAFT
Links
Click Here
Form Actions

Save

Delete

Print

Saving and Submitting Forms

- An agency user who has "Can Create/Edit" rights has two options when saving a form:

Saving and Submitting Forms

- **"Save data only. Do not submit form."**
  - This save option allows the user to save the data incrementally while composing the form. The form may continue to be edited by this agency user or other agency users having the "Can Create/Edit" or "Can Approve/Submit" permissions.
- **"Save data and submit for agency approval."**
  - This save option allows the agency user to save and submit the form for approval by an agency user who has been granted the "Can Approve/Submit" forms processing permission.
  - The user drafting the form can also include text for a BITS generated e-mail message to send to the agency approver
  - After the form is submitted for agency approval, the form becomes "view only" to those agency users having only the "Can Create/Edit" form processing permission.

Saving and Submitting Forms

- Once a form has been "submitted" for agency approval:
  - the form creator and agency approver(s) will receive a system-generated e-mail message, which:
    - identifies the project and type of form requiring agency approval
    - provides a brief message about the processing status of the form
    - contains any additional email text added by form creator
    - contains a hyperlink to allow quick access to the form

- See example email notification on next slide.

Example BITS Forms Processing Email Notification Message

The following form has been submitted by the Form Creator to the Agency Approver for review and approval:

    CO2
    501-16369-000
    VIRGINIA DEPARTMENT OF TRANSPORTATION
    NEW CONST: CHEMICAL STORAGE FACILITIES (28 LOCATIONS)
    CHEMICAL STORAGE FACILITIES (28 LOCATIONS) - NEW CONSTRUCTION

Remarks:
   Any additional remarks added by the Form Creater would appear here.

Click on this link to open the form:
    https://bits-test.dgs.virginia.gov/Pages/Forms/Form.ASPX?Id=33083&Mode=Edit

Saving and Submitting Forms

- In addition to receiving the e-mail notification, the form will also appear in the agency approvers' "My Forms" listing of forms to be processed. ("My Forms" is discussed in-depth in a later Help topic.)

- The form creator will see a screen similar to next slide, offering with several options as to where to proceed next in the system

Saving and Submitting Forms

Form Saved

The CO6 form for project, 13300-009, has been saved.

Click on one of the following to continue:

Return to the CO6 Form   Print the Form   Go to the Forms Home Page   Go to the System Home Page

Done using the system for now, Logout

Saving and Submitting Forms

- The agency approver, a BITS user who has "Can Approve/Submit" rights, has three options when saving a form:

Saving and Submitting Forms

- **"Save data only. Do not submit form."**
  - This save option allows the agency approver to save the data incrementally while editing the form. The form may continue to be edited by this agency user or other agency users who also have the "Can Approve/Submit" permissions.
- **"Save data and rollback to draft."**
  - This save option allows the agency approver to save the form and re-enable the form for editing by the form creator and any other users who have only the "Can Create/Edit" permissions
  - This option also initiates a system-generated email message to both the form creator and other users who have "Can Approve/Submit" permissions. Additional text for the e-mail message may be optionally included if desired. (see next slide)

Save Form Dialog Box

- Following is an example of adding optional text to include in e-mail when "rolling a form back" to the creating user:

- Note, that the remarks to be included in the email message also will remain within the "Save Form" dialog box shown above until they are deleted or overwritten by subsequent users

Saving and Submitting Forms

- **"Save data and submit form to BCOM."**

  - This third save option allows the agency approver to save the form and submit it to BCOM.

  - The agency approver may (optionally) enter text to include in the BITS generated message that will be sent to BCOM

  - After the form is submitted to BCOM, the form becomes "view only" to all agency users.
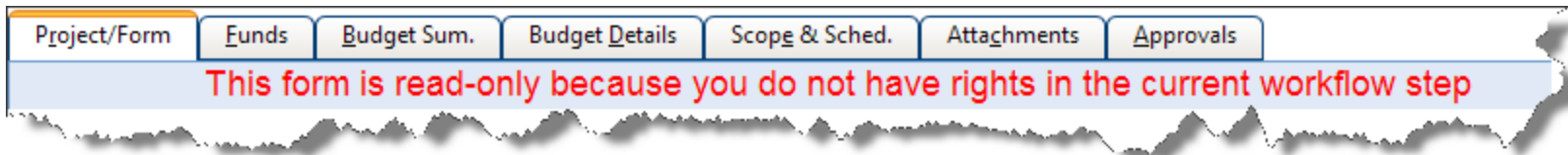
Save Form

Actions:
- ○ Save data only. Do not submit form.
- ○ Save data and rollback to draft.
- ◉ Save data and submit form to BCOM.

Email Remarks:

BCOM, we have clarified scope for this project as discused in the 12/21 telecon. Would appreciate expedited approval of this CO-6.
Thanks,
Tom Jones

[Save] [Cancel Save]

Project/Form	Funds	Budget Sum.	Budget Details	Scope & Sched.	Attachments	Approvals

This form is read-only because you do not have rights in the current workflow step

Saving and Submitting Forms

- Once a form has been "submitted" by the agency approver to BCOM:
  - the form creator, the agency approver(s), and the BCOM will receive a system-generated e-mail message, which:
    - identifies the project and type of form requiring BCOM action
    - provides a brief message about the processing status of the form
    - contains any additional email text added by agency approver
    - contains a hyperlink to allow quick access to the form
  - the form will appear in the BCOM Administrator's "My Forms" listing of forms to be processed (discussed later)
  - the agency approver will see a screen similar to next slide, offering with several options as to where to proceed next in the system

Saving and Submitting Forms

Form Saved

The CO6 form for project, 13300-009, has been saved.

Click on one of the following to continue:

Return to the CO6 Form   Print the Form   Go to the Forms Home Page   Go to the System Home Page

Done using the system for now, Logout

What happens after forms are submitted to BCOM?

- After a form is submitted to BCOM, it proceeds through internal processing by various BCOM staff
- If approval by DPB is also required, the form is advanced to the appropriate DPB Agency Analyst and DPB Section Manager
- After the final required approval is made, the BITS system will generate an e-mail message to advise the agency approvers that the form has been approved

----

- A form may also be "rolled back" to the agency for correction and re-submittal , if necessary, at any point before the final approval is made

Printing Forms

- Forms may be printed at any point in time

- The Form Status (i.e., DRAFT, IN PROCESS, APPROVED, etc.) and Revision Number are prominently displayed at the top of each printed form

- Only form printouts showing the form status of APPROVED or REJECTED should be considered as the final disposition of a form

- To begin the printing process, click on the "Print" icon

Printing Forms

- Forms may also be printed directly from the Forms Home Page, without opening the form, proper
- To print a form directly from the Forms Home Page, just locate the form and click on the printer icon as shown below

Printing Forms

- Note the Form Status and Revision Number fields are prominently displayed at the top of the form

Printing Forms

- The four VCR buttons at the top of the print preview screen, respectively from left to right, perform the following functions:

  - Go to first page
  - Go backward one page
  - Go forward one page
  - Go to last page

Printing Forms

- Click on the "Export to the selected format" picklist to select from several popular export formats
- For best printing results, PDF format is recommended
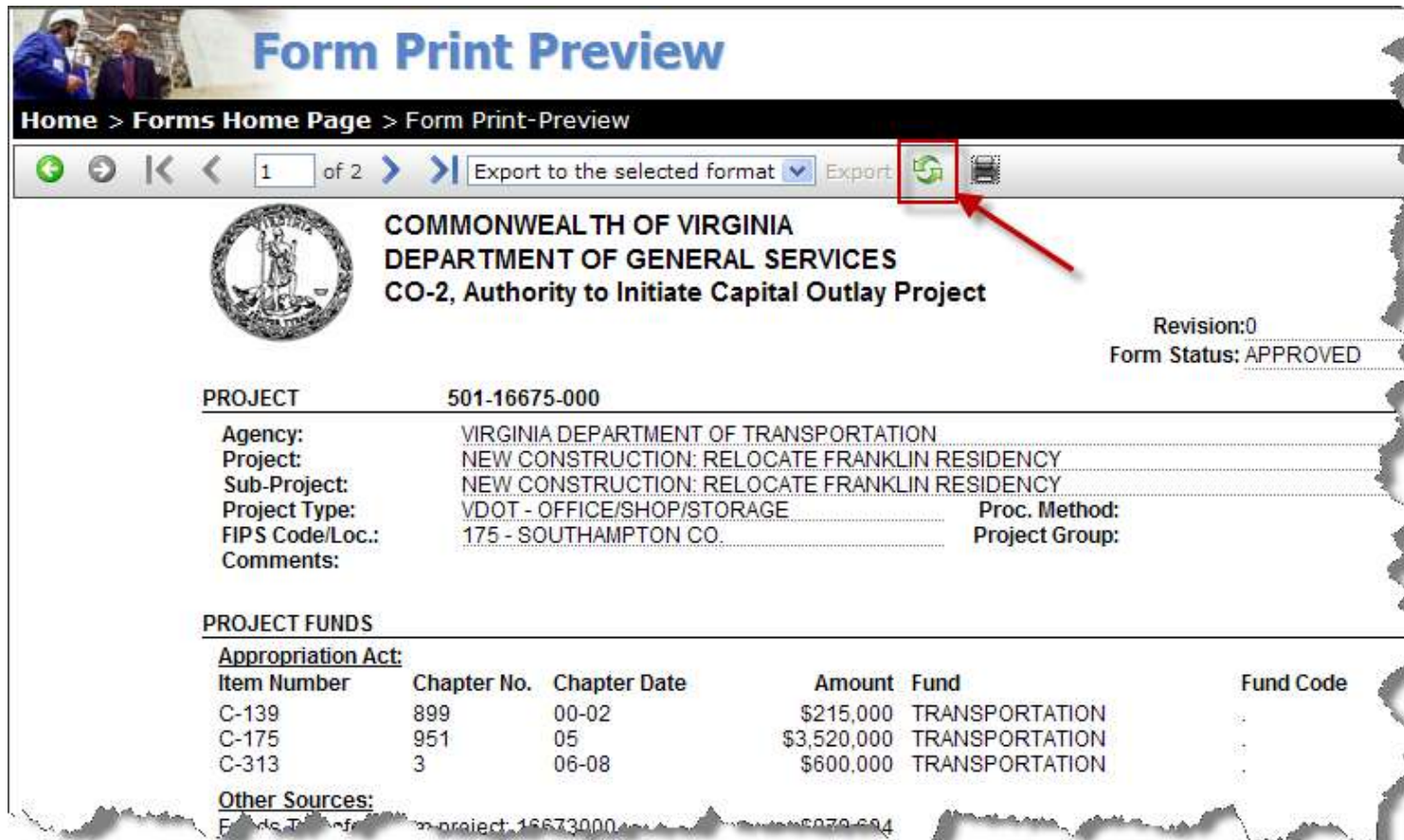
Printing Forms

- Clicking on the icon highlighted below will re-query the database to refresh the results

Printing Forms

- Clicking on the printer icon highlighted below will send the form to the user's default printer
  - If printing to default printer does produce adequate results, try exporting from to pdf format first and then print the pdf file to a desired printer

Acrobat Reader Settings

IMPORTANT !

- In order for some printing features to be work properly, users may need to enable JavaScript in Adobe Reader

- To do so:
  - Open the Acrobat Reader program
  - Select Edit, Preferences, JavaScript
  - Check the box marked "Enable Acrobat JavaScript"

Building Information Tracking System

"My Forms"

Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management

"My Forms" Page

- The "My Forms" Page can be accessed from the BITS Home Page:
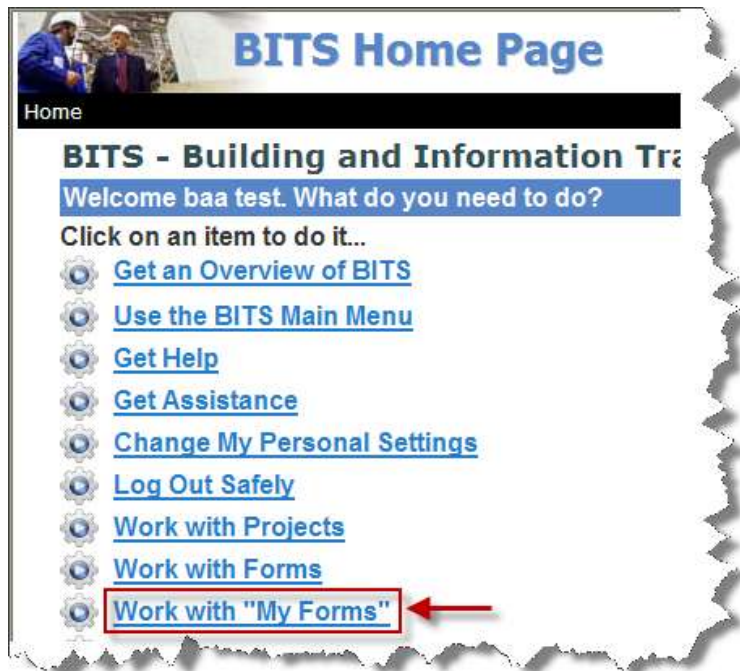
or from the BITS Main Menu:

"My Forms" Page

- **The "My Forms" Page provides a listing of all BITS forms which are in the user's BITS workflow step for processing** (see next slide)
- All agency users with "Can Edit" or "Can Approve" rights, can edit a form when it is in the Draft Step
- When an agency user creates a form and submits it to the Agency Step, all agency users with "Can Approve" rights for this form type will receive an email from BITS to advise them that a form has been advanced to them. It will also appear in each approver's individual "My Forms" page in BITS. Just be mindful that any approver with similar rights (as assigned by their Agency Access Coordinator) has the capability to approve and submit the form. Which specific agency approver(s) need to act on the form and submit it to BCOM is a procedural choice by the agency; the system merely provides the notification and capability for <u>any of them</u> to do so.

Forms Status / Workflow

- "Form Status" indicates, at a summary level, to which stage of processing a form has progressed in the forms processing workflow:

Workflow Steps:

| Agency Form Creator **(Draft Step)** | → | Agency Form Approver **(Agency Step)** | → | BCOM **(Admin, Lead Reviewer and Director steps)** | → | DPB **(DPB Analyst and Section Mgr. steps) *** | → | Distributed |

Form Status:

DRAFT → **IN PROCESS** → APPROVED or REJECTED

Any agency user having "Can Create/Edit" rights, as approved by their BITS Agency Access Coordinator, may draft a form; however, the form may only be submitted by agency users having "Can Approve/Submit" rights.
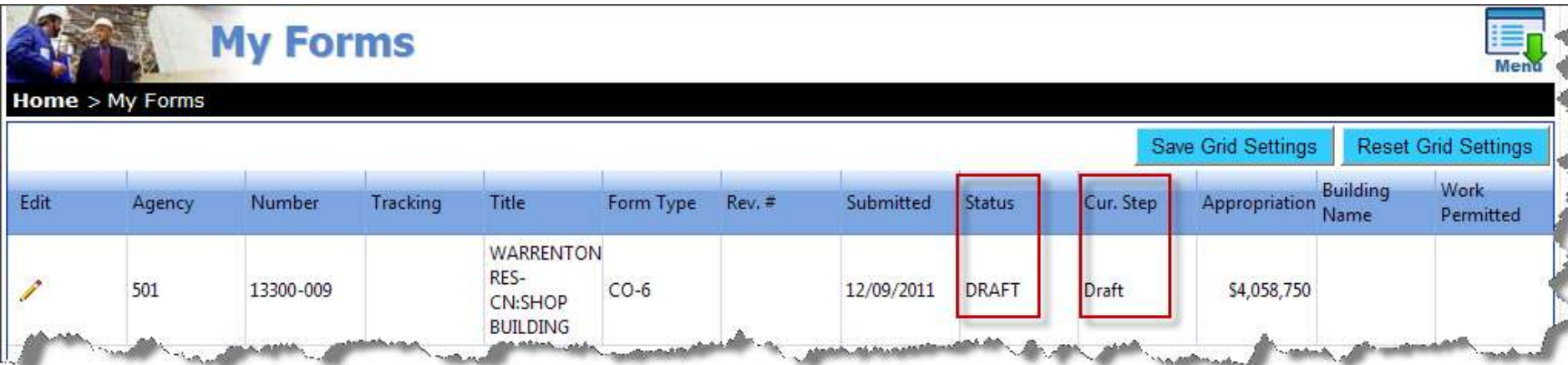
While a form is "IN PROCESS", it is routed for processing thru various BCOM staff for action.

* - DPB Agency Analysts and Section Managers are in the workflow for processing $CO-2$ forms and certain $CO-8$ forms.

"ON HOLD" is a special "IN PROCESS" status. "ON HOLD indicates that processing has been temporarily suspended. (Usually means BCOM awaiting additional information from the agency or AE).

"My Forms" Page

- Below is an example "My Forms" Page
- In this example, the form is in the <u>DRAFT status</u>, which means the form is being composed by the agency
- Notice from the previous slide, there are two distinct steps, under the <u>DRAFT status</u>, the Draft Step and the Agency Step
- The example form below is in the Draft Step
- In the Draft Step, any agency user with "edit only" or "edit and approve" rights may edit the form

My Forms

Home > My Forms

Save Grid Settings | Reset Grid Settings

Edit	Agency	Number	Tracking	Title	Form Type	Rev. #	Submitted	Status	Cur. Step	Appropriation	Building Name	Work Permitted
🖉	501	13300-009		WARRENTON RES-CN:SHOP BUILDING	CO-6		12/09/2011	DRAFT	Draft	$4,058,750		

"My Forms" Page

- Below is another example "My Forms" Page
- In this example, the form is still in the <u>DRAFT status</u>, which means the form is being composed by the agency, however, the form has been advanced to the Agency Step for agency approval of the form
- In the Agency Step, an agency user must have "approve/submit" rights to edit, approve, and submit the form to BCOM
- Once the agency approver submits the form to BCOM, it will no longer appear in an agency user's "My Forms" list of forms to process

My Forms

Home > My Forms

Edit	Agency	Number	Tracking	Title	Form Type	Rev. #	Submitted	Status	Cur. Step	Appropriation	Building Name	Work Permitted
✎	501	13300-009		WARRENTON RES-CN:SHOP BUILDING	CO-6			DRAFT	Agency	$4,058,750		

Save Grid Settings   Reset Grid Settings

"My Forms" Page

- Unlike the Forms Home Page, there are no filtering options on the "My Forms" page
- The "My Forms" page has been pre-filtered by BITS to display only those forms which are currently awaiting action by the logged-in user (or users with similar rights)
- Once a user has taken action, the user will receive a system-generated email message and the form will no longer appear on their "My Forms" page. The form will now appear on the "My Forms" page of the user in the next workflow step who needs to take action on the form.
- Users who have completed their actions (by submitting the form) can still continue to view, but not edit, the form by:
  - clicking on the link provided in the system-generated email message, or
  - accessing the form via the regular Forms Home Page (as discussed earlier)

"My Forms" Page

- While there are no filtering options on the "My Forms" page, users may still make certain customizations to this page, such as
  - sorting the page on one or more of the fields
  - adjusting column widths
- Please refer to the Forms Home Page for instructions on making these changes, as the steps are identical for the My Forms page

- Once the user has customized the page as desired, click on "Save Grid Settings" to maintain these sorting and column-width changes
- To reset the grid to its default appearance, click "Reset Grid Settings"

Building Information Tracking System

Viewing BITS Alerts

Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management

BITS Alerts

- "BITS Alerts" are messages posted within the system to inform BITS users of significant issues and events
- BITS Alerts won't eliminate, but should significantly reduce, the number of mass e-mails sent to BITS users
- Alerts will generally have an expiration limit for display
- When a user logs into BITS any unexpired alerts (i.e., active alerts) that the user has not yet viewed will be displayed
- Any active alerts that a user has already viewed once will no longer be displayed at subsequent logins, however, the user can continue to view any open alerts as follows

BITS Alerts

- "BITS Alerts" can be accessed from the Default Home Page

- BITS Alerts can also be accessed from the BITS Main Menu

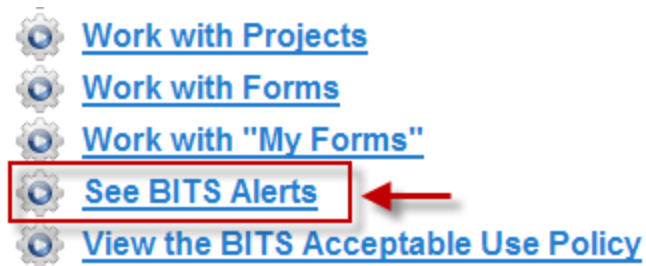# Building Information Tracking System

**Viewing the
BITS Acceptable Use Policy**

*Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management*

BITS Acceptable Use Policy
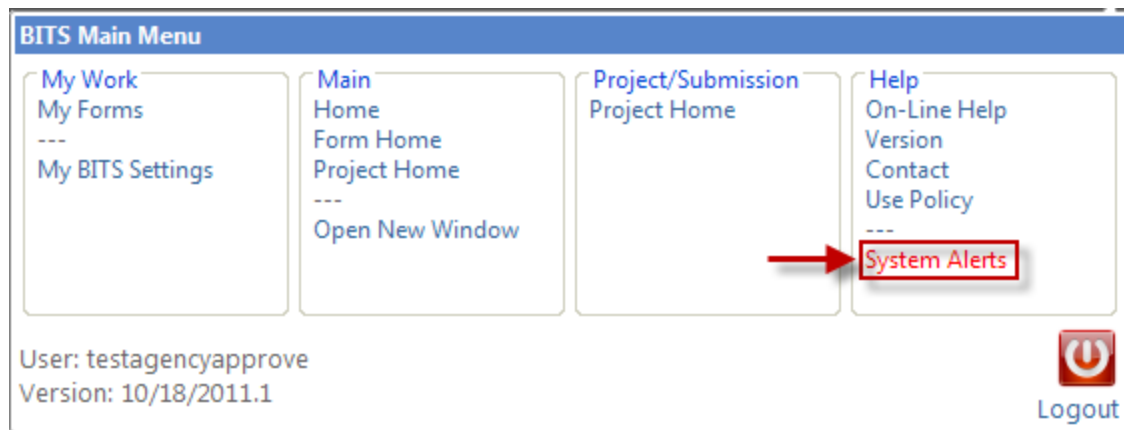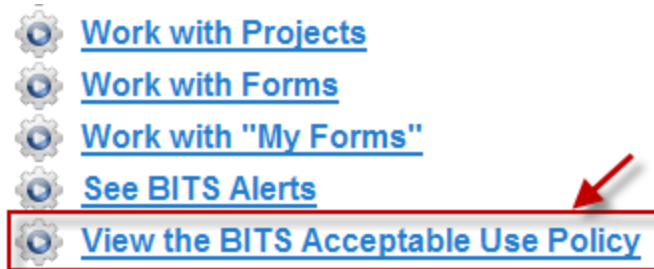
- Agreeing to comply with the BITS Acceptable Use Policy is a condition of receiving and maintaining a BITS User Account
- The BITS Acceptable Use Policy is accessible from the Default Home Page

  Work with Projects
  Work with Forms
  Work with "My Forms"
  See BITS Alerts
  View the BITS Acceptable Use Policy

- The Policy is also accessible from the BITS Main Menu

  BITS Main Menu

  My Work
  My Forms

  My BITS Settings

  Main
  Home
  Form Home
  Project Home

  Open New Window

  Project/Submission
  Project Home

  Help
  On-Line Help
  Version
  Contact
  Use Policy

  System Alerts

  User: testagencyapprove
  Version: 10/18/2011.1

  Logout