



## Commissioning Training Guide

Date Created: 12/12/2022

Date Updated: 12/19/2022

## Contents

About.....	3
Process Overview.....	3
Step-by-Step Instructions.....	4
Create Commissioning Record.....	4
Edit Commissioning Record.....	8
Generate Final Report.....	11

## About

The Commissioning application will be used to capture attachments required for the Commissioning Report. In addition, a final report can be created by compiling together the attachments.

## Process Overview

The Commissioning Team will use the application to create records with an identifying document type based on the phase of the project. Documentation will be attached to each Commissioning record.

The Commissioning Team can create a record with a 'Final Report' type that will compile together all the attachments gathered in the Commissioning Module. A composite document can be generated which allows the user to combine the different attachments into a single PDF. This report can be generated multiple times to create preliminary and final reports.

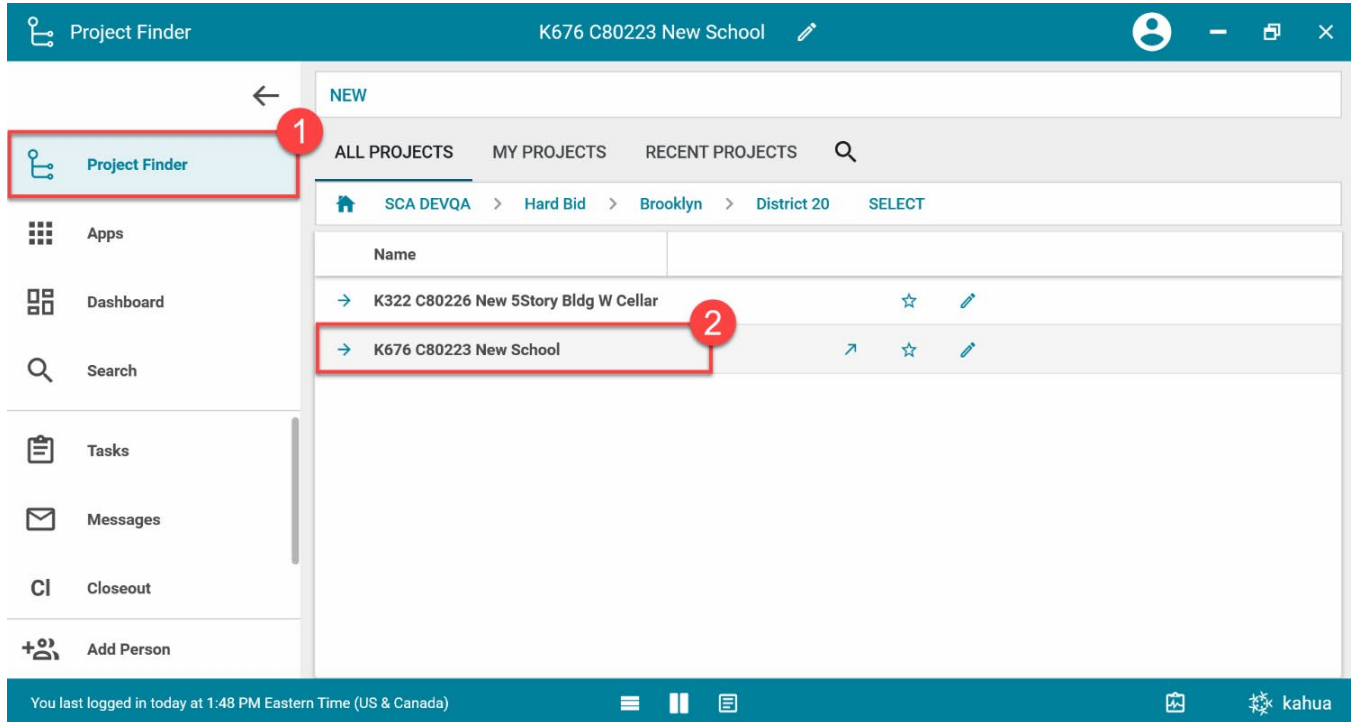
# Step-by-Step Instructions

## Create Commissioning Record

Role	Preceding Steps	Outcome
Commissioning Team	→ None.	→ A new Commissioning record is created with a specified document type and attachments.

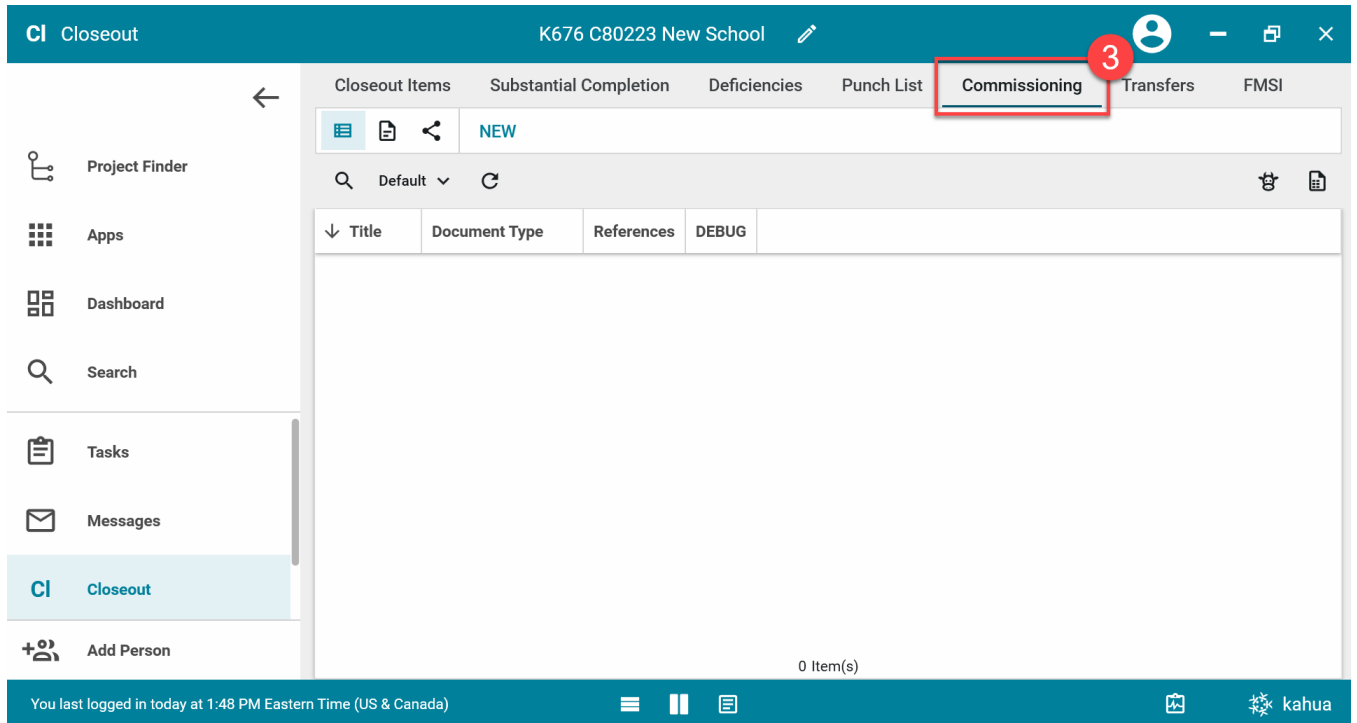
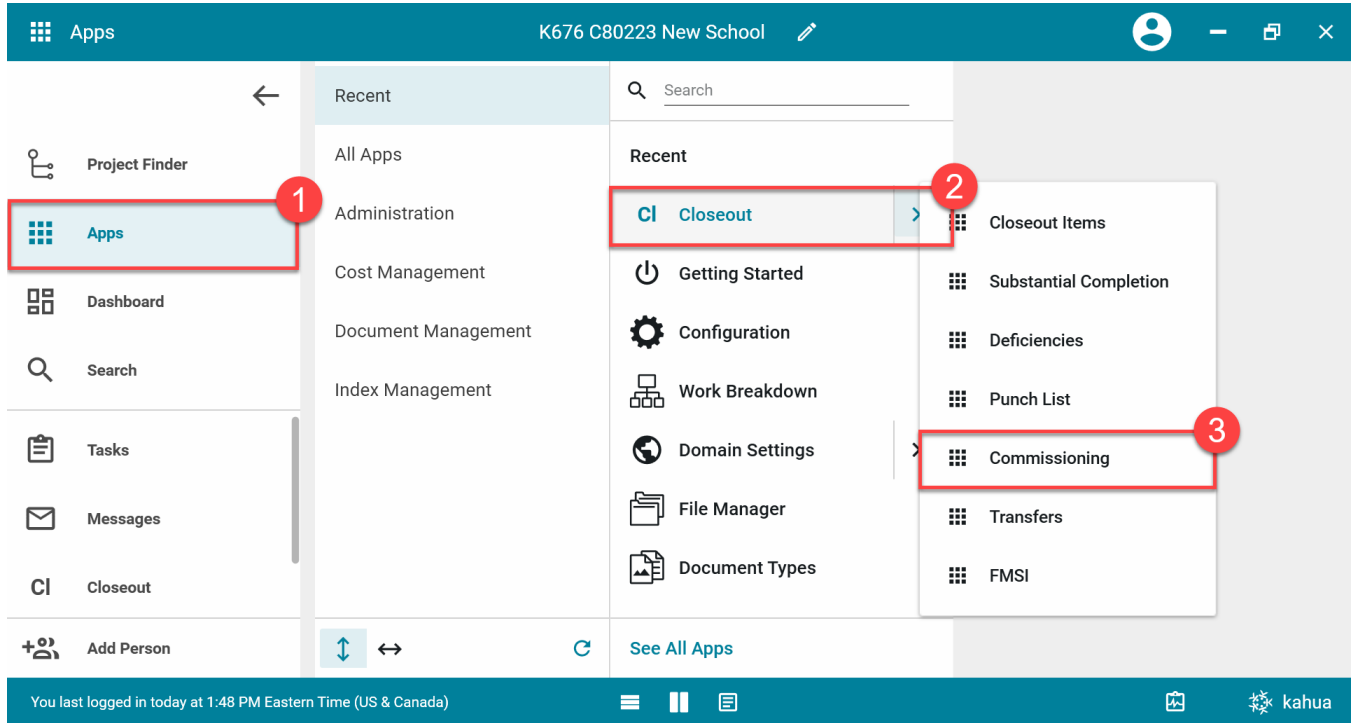
### Steps

1. Go to "Project Finder" > Navigate to the subproject

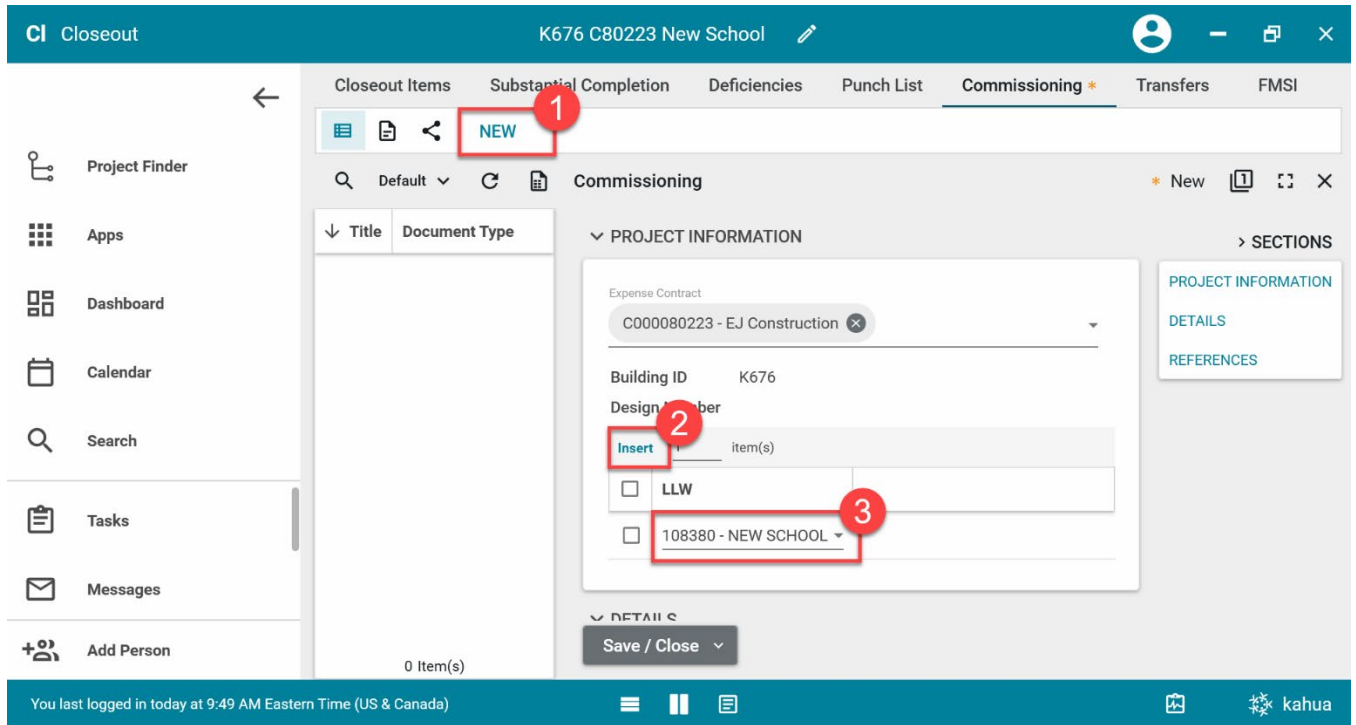


**Note:** After clicking on a subproject, the name of the subproject should appear in the middle of the blue title bar on the top of the screen.

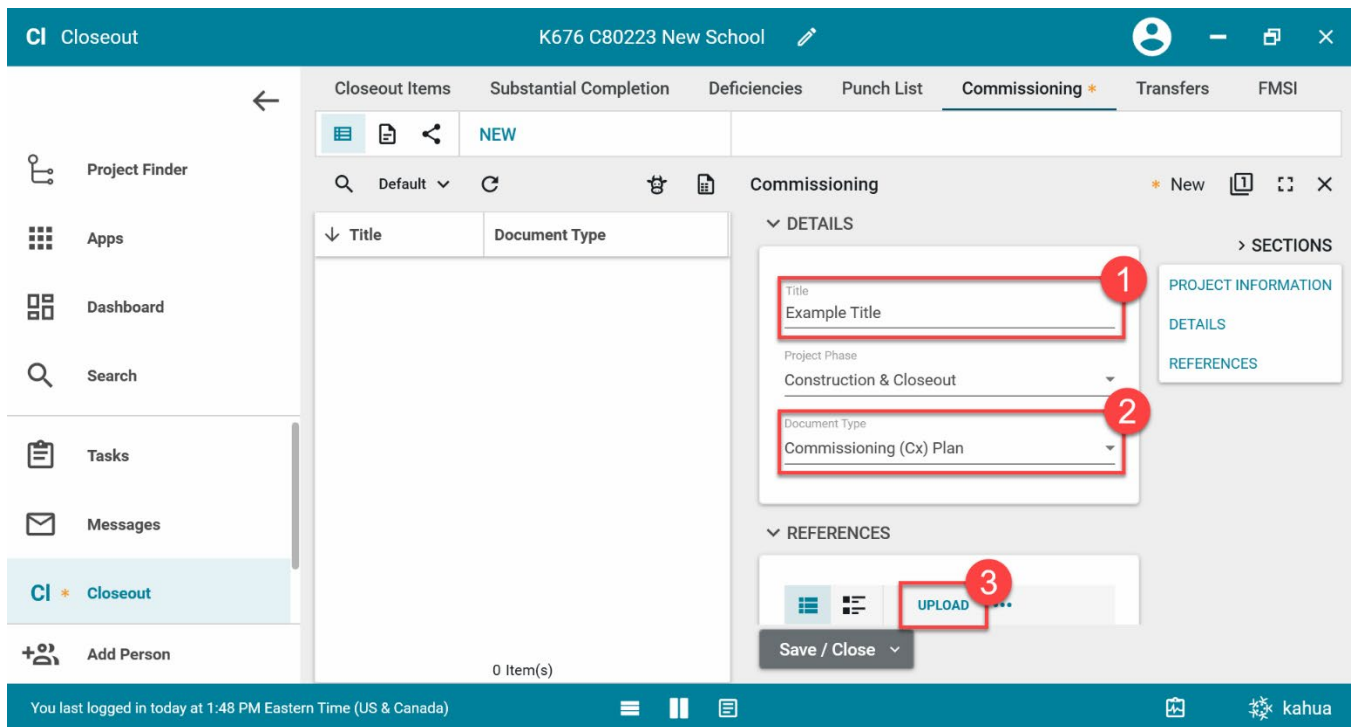
- Go to "Apps" > Click "Closeout" > Click the "Commissioning" tab (it will be underlined blue when selected properly)



3. Click the "NEW" button on the top-left > In the LLW table, select the 'Insert' button to create a new row > Use the dropdown in the LLW column to select the LLW (if there is only one LLW, this will be automatically selected)



4. Enter the required fields: Title, Document Type > In the References section, select 'Upload' to attach a file

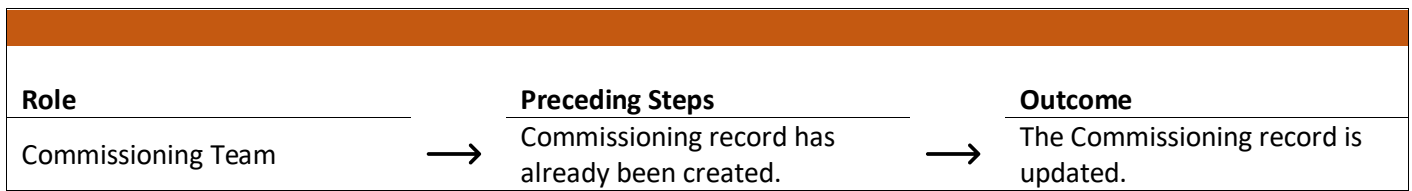


**Note:** The available Document Types will change depending on the Project Phase dropdown. By default, the Project Phase defaults to the Phase in the Portfolio Manager.

5. Click 'Save/Close'

The screenshot shows the 'Closeout' application interface for 'K676 C80223 New School'. The top navigation bar includes 'Closeout Items', 'Substantial Completion', 'Deficiencies', 'Punch List', 'Commissioning \*', 'Transfers', and 'FMSI'. The 'Commissioning \*' tab is active, displaying a 'NEW' button and a search bar. Below the search bar is a table with columns 'Title' and 'Document Type', currently showing '0 Item(s)'. To the right of the table is a 'Commissioning' form with an 'UPLOAD' button and a table with columns 'TYPE' and 'DESCRIPTION'. Under the 'REFERENCES' section, there are two rows of 'Supporting Document' entries, each with a checkbox and a document icon. At the bottom right of the form, a 'Save / Close' button is highlighted with a red circle containing the number '1'. The left sidebar contains navigation options: Project Finder, Apps, Dashboard, Search, Tasks, Messages, Closeout (selected), and Add Person. The bottom status bar shows the login time and the 'kahua' logo.

## Edit Commissioning Record



### Steps

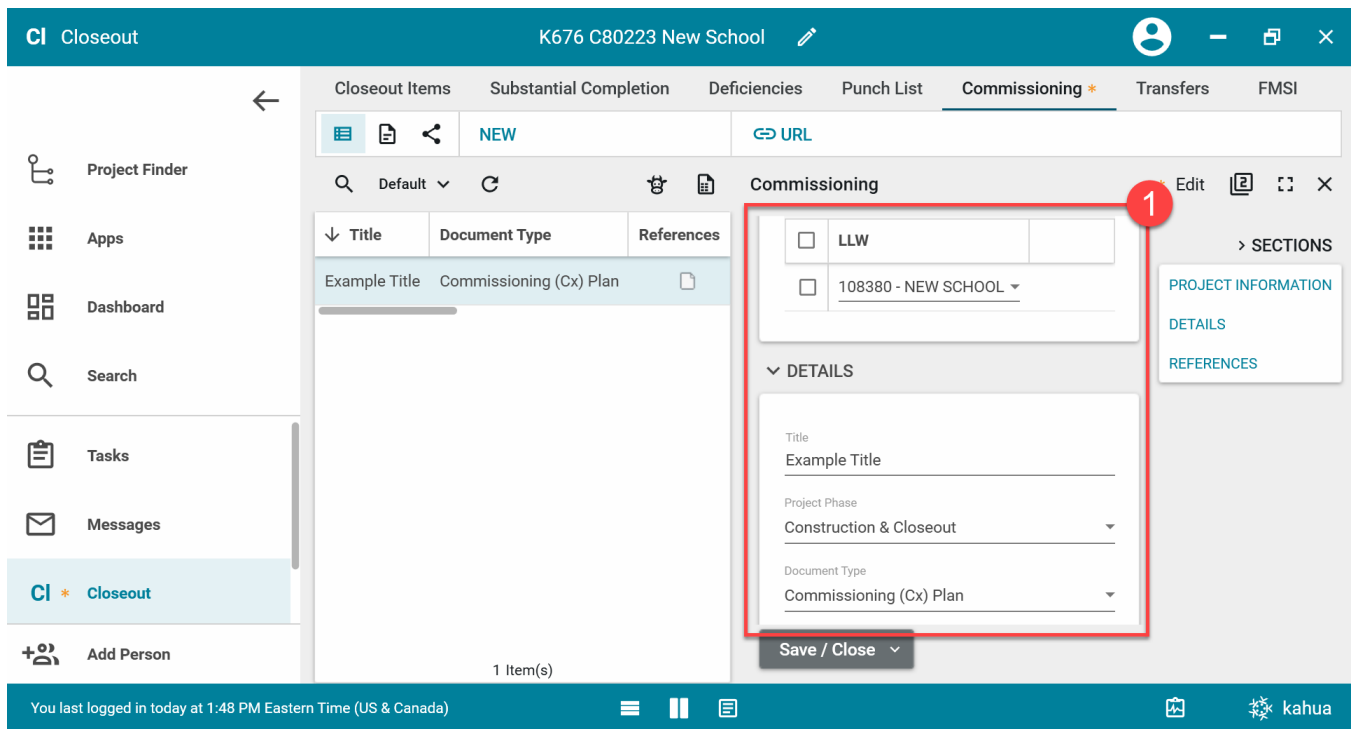
1. Select the desired Commissioning record > Click 'Edit' at the top-right

The screenshot shows the 'Closeout' interface for 'K676 C80223 New School'. The 'Commissioning' tab is active, displaying a table with one record: 'Example Title' of type 'Commissioning (Cx) Plan'. A red box highlights this record, and a red circle with the number '1' is placed over the 'EDIT' button in the top right corner of the record's action menu.

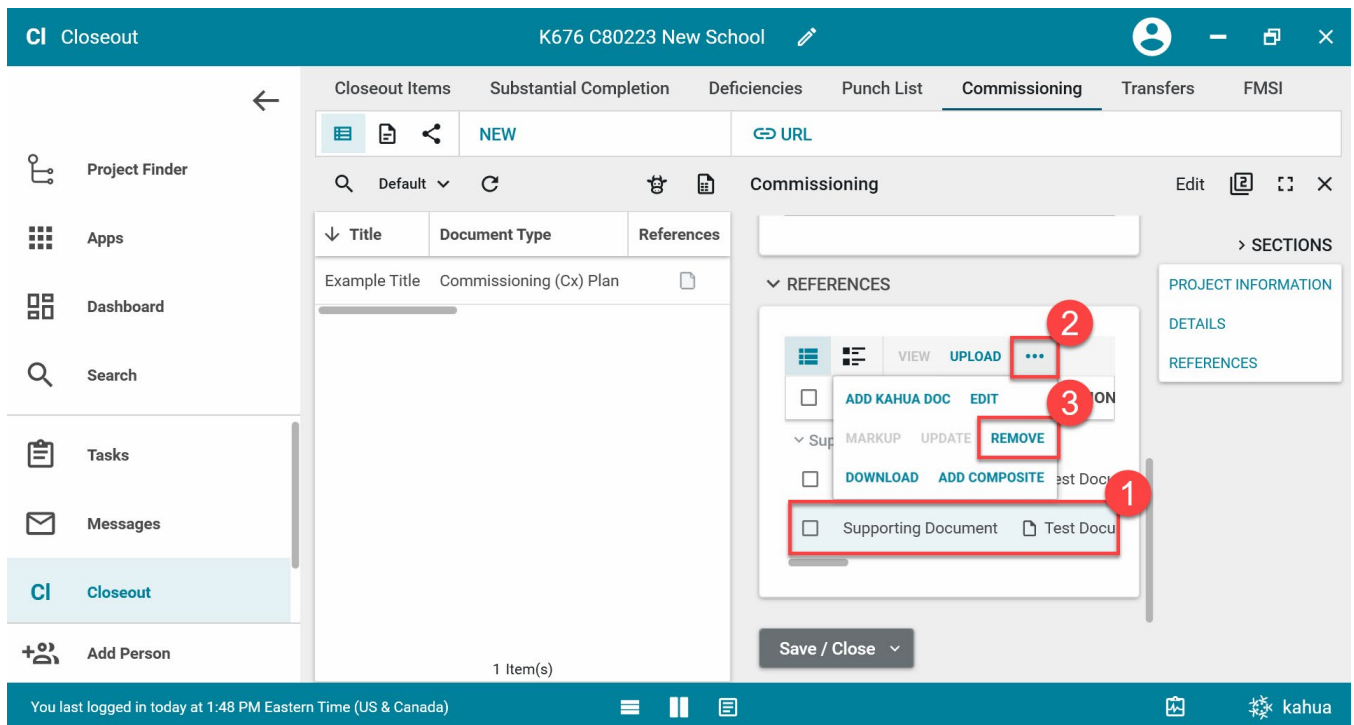
The screenshot shows the 'Closeout' interface for 'K676 C80223 New School' with the details of the 'Example Title' Commissioning record. The 'EDIT' button in the top right corner of the record's action menu is highlighted with a red box, and a red circle with the number '2' is placed over it. The record details are displayed in a card view, including 'PROJECT INFORMATION' and 'DETAILS' sections.



2. Edit the details of the record including LLW, Title, Project Phase, or Document Type

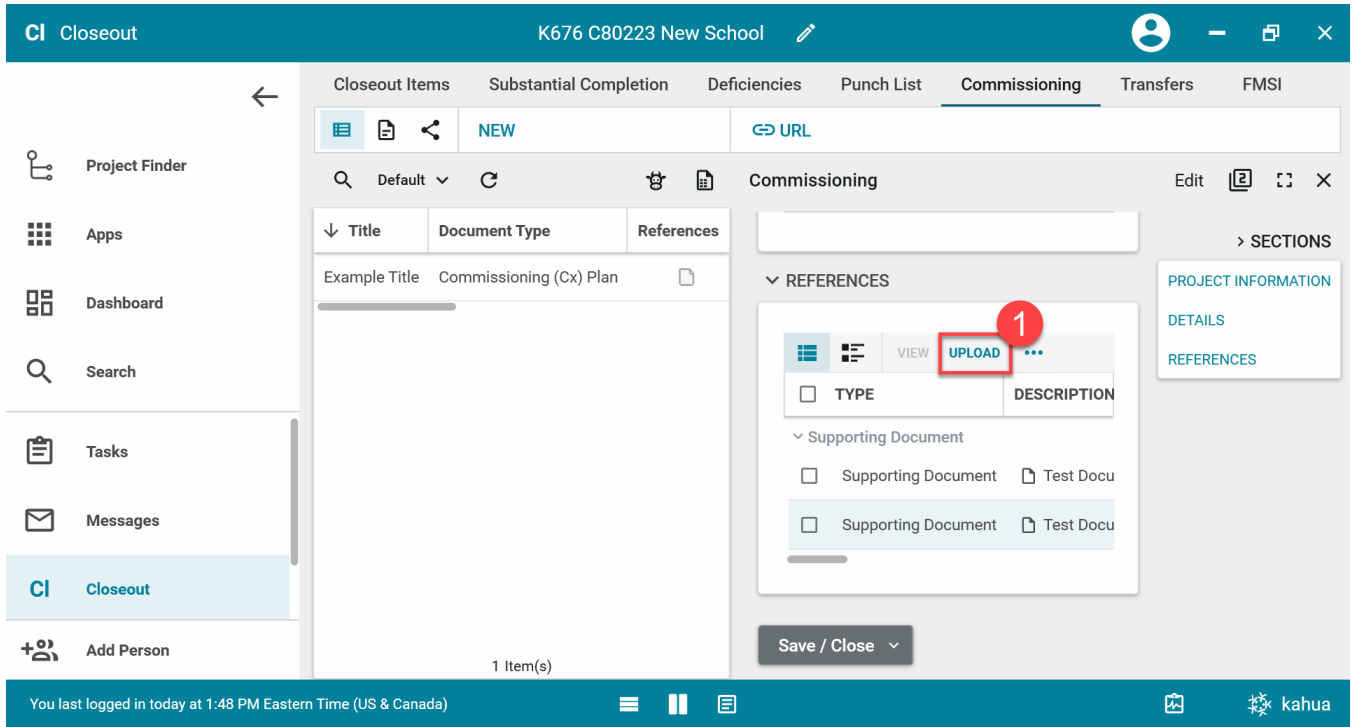


3. Deleting an attachment: In the References section, select the desired attachment. > Click 'Remove' in the bar above the table

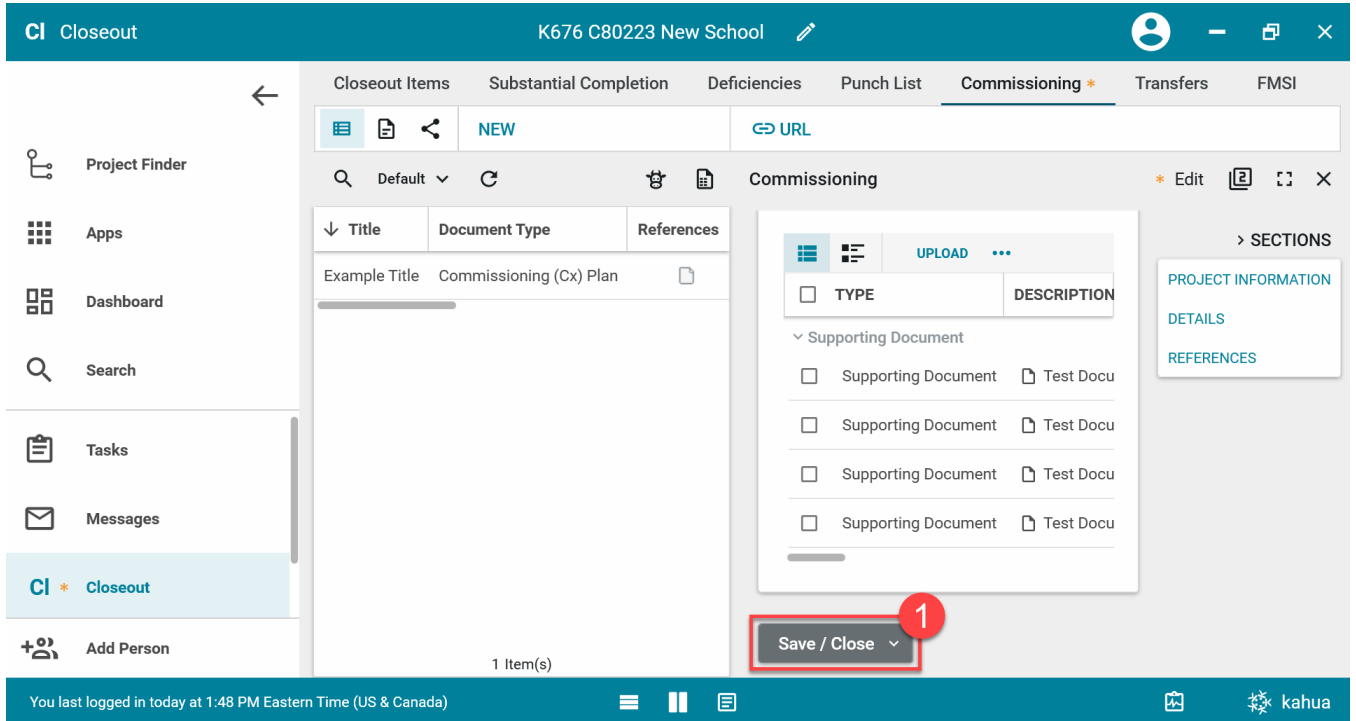


**Note:** You may have to click the ellipsis in the bar above the table to reveal all the options including remove.

4. Adding an attachment: In the References section, select the 'Upload' button to attach a file.



5. Click 'Save/Close' to commit changes



## Generate Final Report

Role	Preceding Steps	Outcome
Commissioning Team	→ Commissioning records have already been created. →	<p>A Commissioning record is created specifically for the final report. This record contains the attachments from the records.</p> <p>A composite file is generated, compiling together the different attachments into a single pdf.</p>

### Steps

1. Click the "NEW" button on the top-left

The screenshot shows the 'Closeout' application interface for project 'K676 C80223 New School'. The 'Commissioning' tab is active, displaying a table with two items. A red circle with the number '1' highlights the 'NEW' button in the top-left corner of the table area.

Title	Document Type	References	DEBUG
Example 2	Commissioning (Cx) Issues Log		
Example 1	Commissioning (Cx) Plan		

2 Item(s)

- In the LLW table, select the 'Insert' button to create a new row > Enter a Title > Select 'Final Report' as the Document Type > Click 'Save/Close'




The screenshot shows the 'Closeout' application interface for 'K676 C80223 New School'. The main navigation bar includes 'Closeout Items', 'Substantial Completion', 'Deficiencies', 'Punch List', 'Commissioning \*', 'Transfers', and 'FMSI'. The 'Commissioning' section is active, displaying a table with two items:

Title	Document Type
Example 2	Commissioning (Cx) Issues Log
Example 1	Commissioning (Cx) Plan

Below the table, there are two red callouts: '1' pointing to the 'Insert' button and '2' pointing to the 'Title' field in the form. The form also includes a 'Project Phase' dropdown set to 'Construction & Closeout', a 'Document Type' field with a red 'Field is required.' error message, and a 'Save / Close' button with a red callout '4'. A red callout '3' points to the 'Document Type' field. The bottom status bar shows 'You last logged in today at 1:48 PM Eastern Time (US & Canada)' and the 'kahua' logo.

3. Select the commissioning record that was created > Select 'Edit' at the top-right

The screenshot shows the 'Closeout' application interface for 'K676 C80223 New School'. The 'Commissioning' tab is active, displaying a table of items. The first row, 'Example Final Report' (Final Report), is highlighted with a red box. A red circle with the number '1' is positioned next to the 'References' icon for this item. The table has columns for 'Title', 'Document Type', and 'References'. Below the table, it indicates '3 Item(s)'. The left sidebar contains navigation options like 'Project Finder', 'Apps', 'Dashboard', 'Search', 'Tasks', 'Messages', 'Closeout', and 'Add Person'. The top bar shows the user's name and a 'kahua' logo.

Title	Document Type	References
Example Final Report	Final Report	
Example 2	Commissioning (Cx) Issues Log	
Example 1	Commissioning (Cx) Plan	

This screenshot shows the 'Closeout' application with the 'Example Final Report' item selected. The 'EDIT' button in the top right of the item's action bar is highlighted with a red box and a red circle containing the number '2'. The application displays detailed information for the selected item, including 'PROJECT INFORMATION' (Expense Contract, Building ID, Design Number) and 'DETAILS' (Title, Project Phase). The left sidebar and top navigation bar are consistent with the previous screenshot.

Title	Document Type
Example Final Report	Final Report
Example 2	Commissioning (Cx) Issues Log
Example 1	Commissioning (Cx) Plan

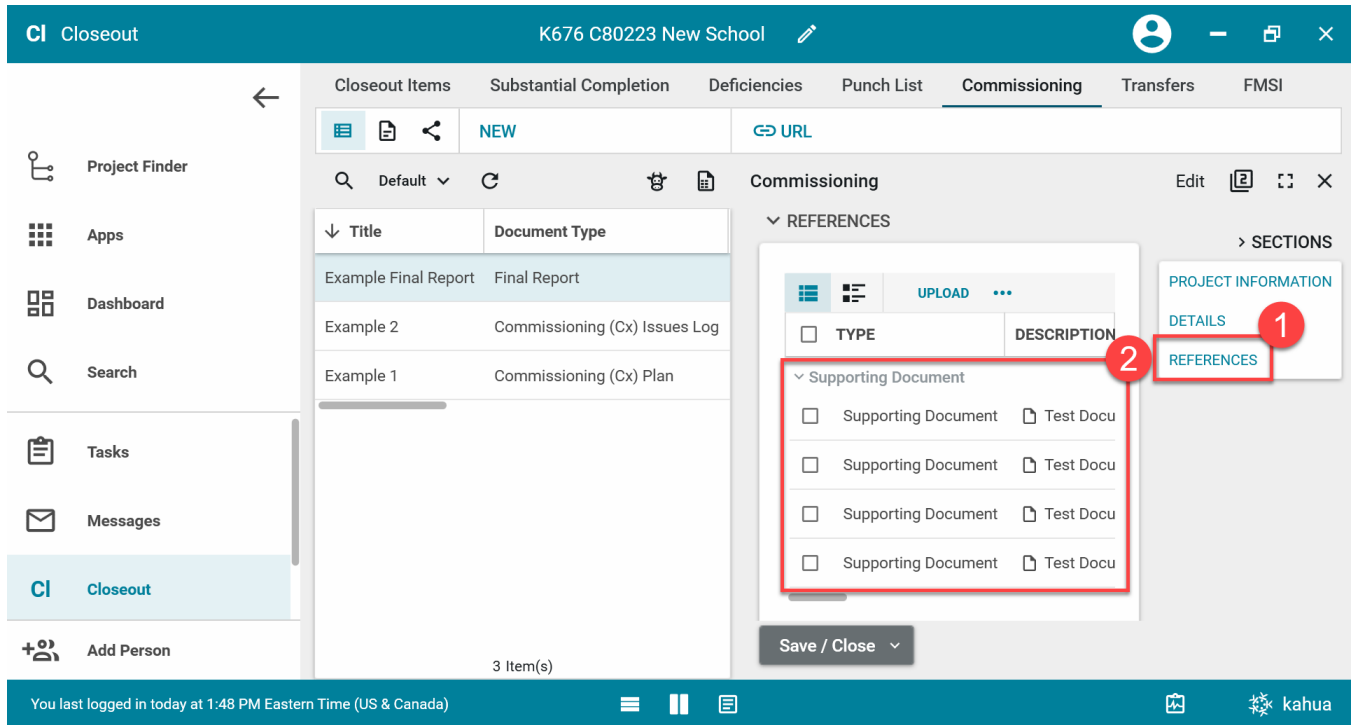
**PROJECT INFORMATION**

- Expense Contract: - C000080223 - EJ Construction - New Schoo
- Building ID: K676
- Design Number: LLW
- 108380 - NEW SCHOOL

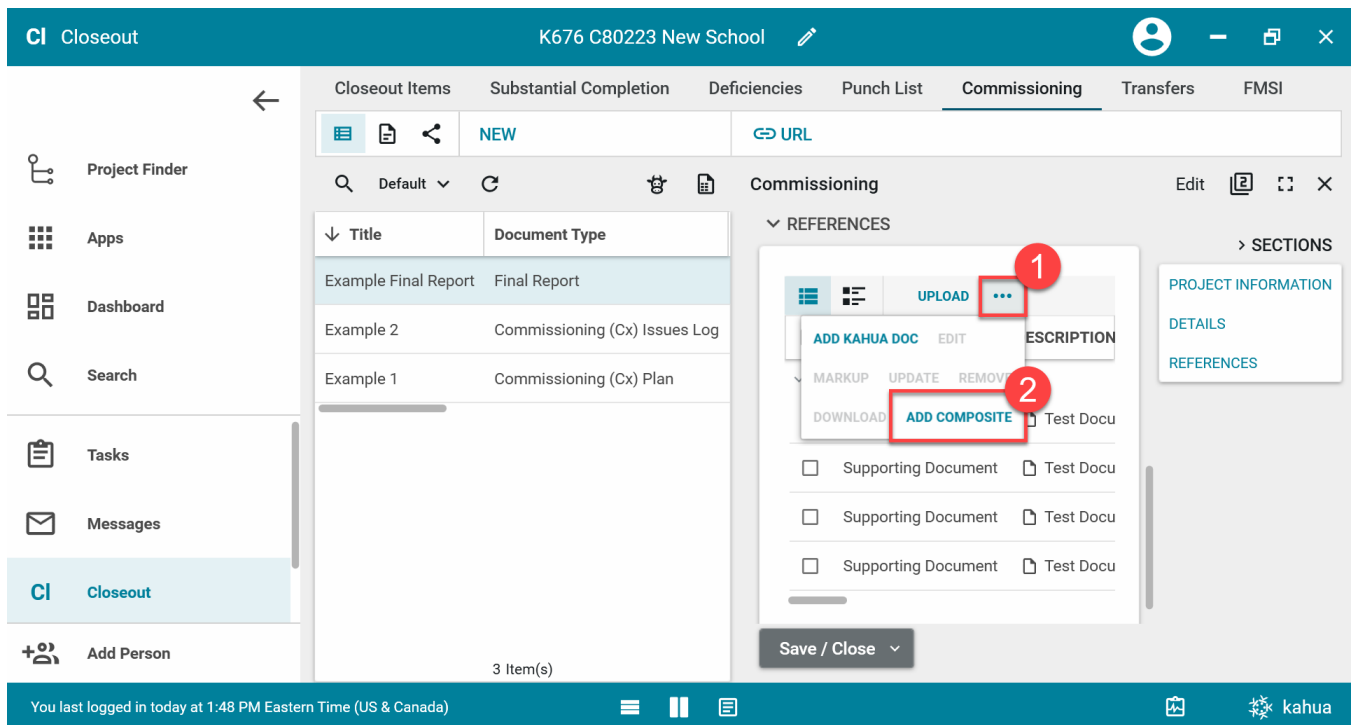
**DETAILS**

- Title: Example Final Report
- Project Phase: Construction & Closeout

4. In the References section, the attachments from all other commissioning items will automatically be added to the References section



5. Select the 'Add Composite' button in the bar above the list of files (you may need to select '.' to display the button)



- In the pop-up window, enter in a Filename > Use the checkboxes in the 'Include' column to select the attachments that you wish to compile together > At the rightmost column of the table, use the up and down buttons to change the order of the documents > Select 'Ok'

The screenshot shows the 'Create Composite Document' dialog box. At the top, there is a 'Filename' field containing 'Example Composite File' (1). Below it is an 'Include On Send' checkbox. The main part of the dialog is a table with the following columns: 'Include', 'Type', 'Description', 'Page Count', 'Size', 'Is Current', and order arrows. The 'Include' column has four checked boxes (2). The order arrows column has four sets of up/down arrows (3). At the bottom right, there are 'Cancel' and 'Ok' buttons (4).

Include	Type	Description	Page Count	Size	Is Current	Order
<input checked="" type="checkbox"/>	Supporting Document	Test Document - Copy (2).docx	0	0 KB	Yes	^ v
<input checked="" type="checkbox"/>	Supporting Document	Test Document - Copy (3).docx	0	0 KB	Yes	^ v
<input checked="" type="checkbox"/>	Supporting Document	Test Document - Copy.docx	0	0 KB	Yes	^ v
<input checked="" type="checkbox"/>	Supporting Document	Test Document.docx	0	0 KB	Yes	^ v

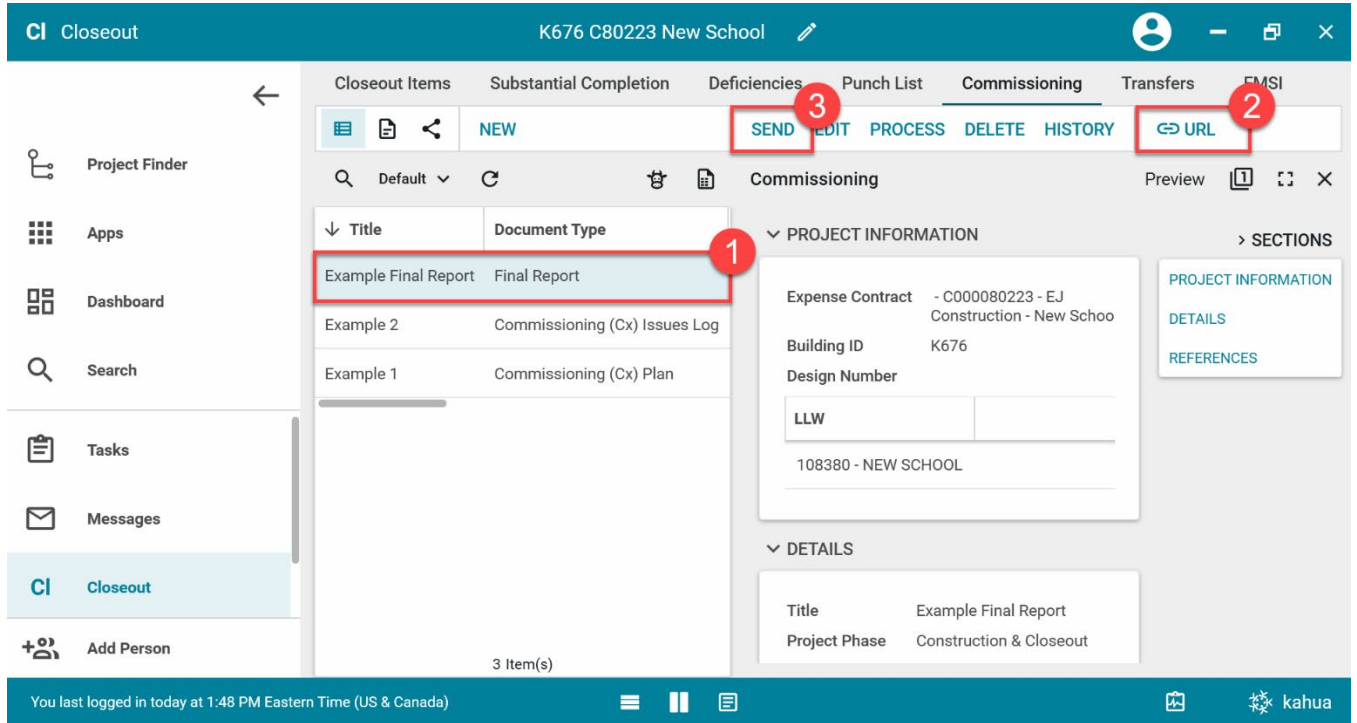
- Click 'Save/Close'

The screenshot shows the 'Commissioning' page. On the left, there is a table with columns 'Title' and 'Document Type'. The table contains three rows: 'Example Final Report' (Final Report), 'Example 2' (Commissioning (Cx) Issues Log), and 'Example 1' (Commissioning (Cx) Plan). On the right, there is a 'Composite Document' section with a list of documents and checkboxes. At the bottom right, there is a 'Save / Close' button (1).

Title	Document Type
Example Final Report	Final Report
Example 2	Commissioning (Cx) Issues Log
Example 1	Commissioning (Cx) Plan

**Note:** You can edit the composite document by selecting the document and clicking on 'Edit' in the bar above the list of files.

8. Share Final Report: Select the commissioning record that was created > Click 'URL' to copy the link to the document > Click 'Send'



9. Choose Kahua contact(s) to send the message to > Enter a message subject > Paste the copied link in the message body along with any other details > Click 'Send'

