# CAMP
## Construction & Architecture Management Platform

# Commissioning Training Guide

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# Contents

## 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.
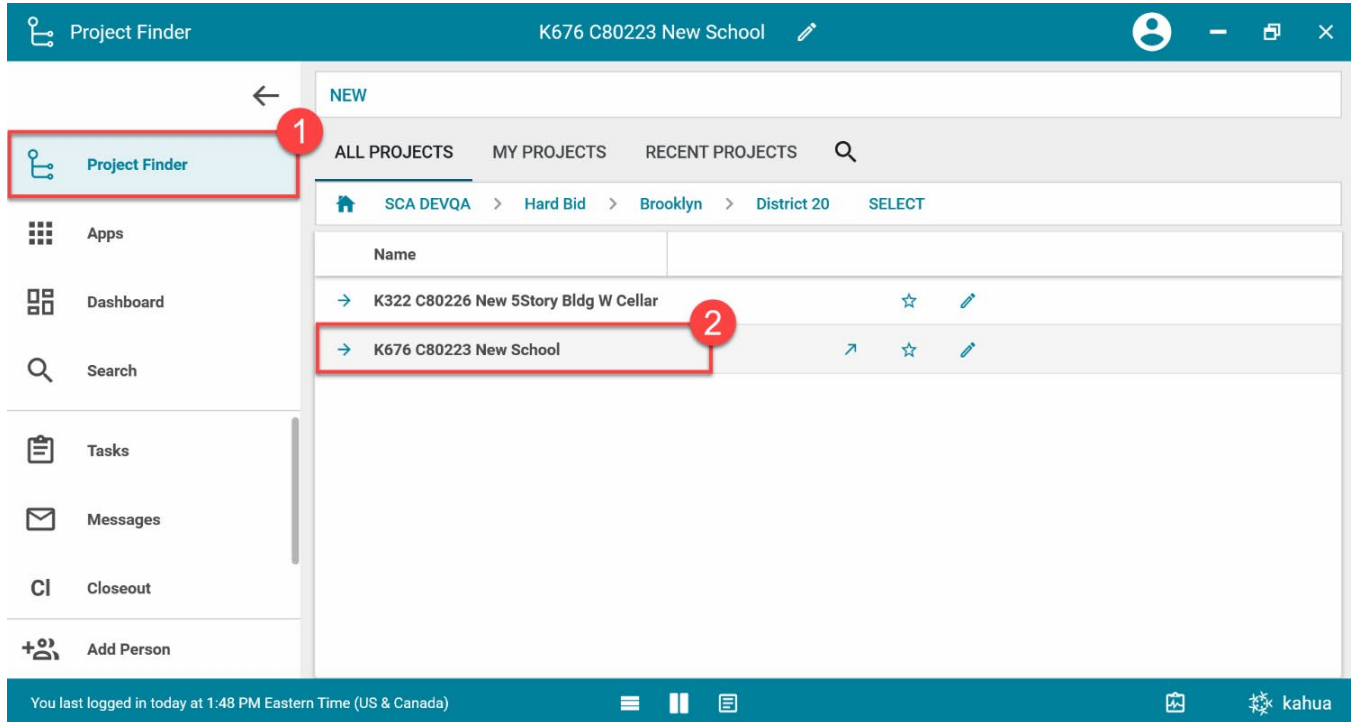
# Step-by-Step Instructions

## 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.

2. Go to "Apps" > Click "Closeout" > Click the "Commissioning" tab (it will be underlined blue when selected properly)
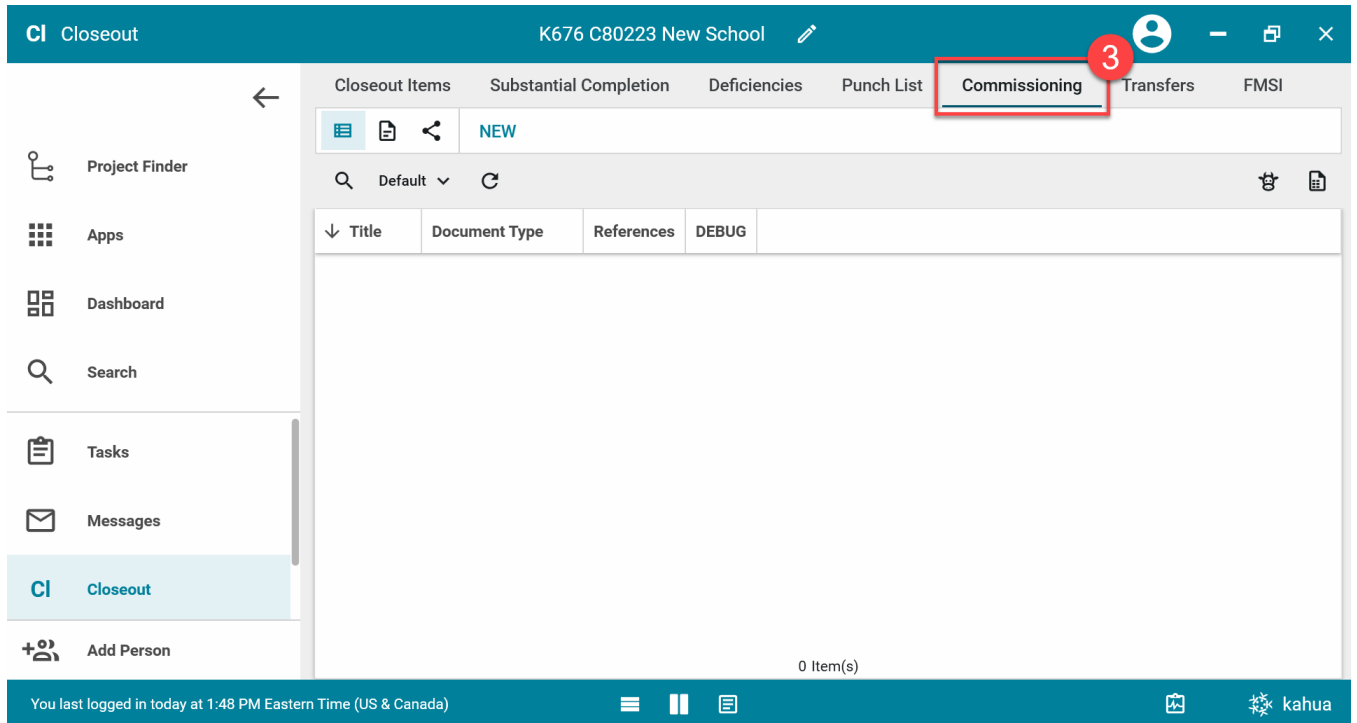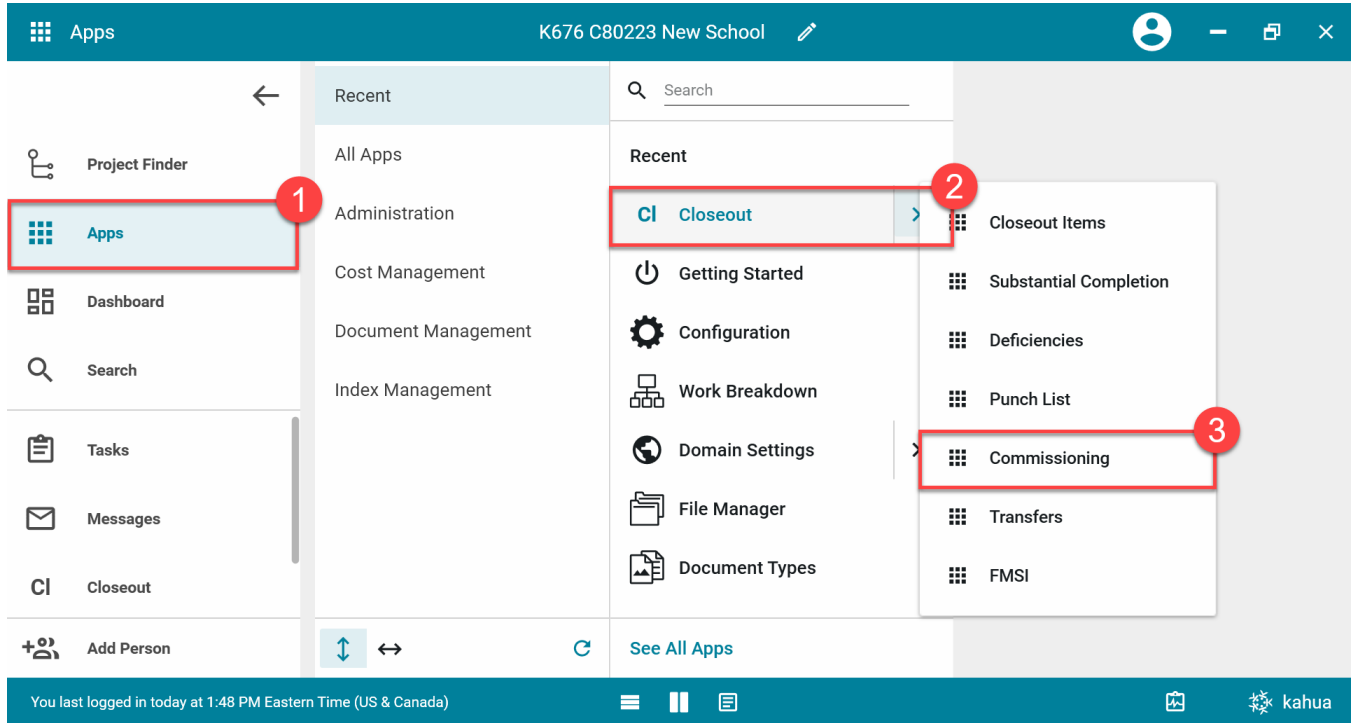
3.  Click the "NEW" button on the top-left > In the LLW table, select the 'Insert' button to create a new row > Use the dropdown in the LLW column to select the LLW (if there is only one LLW, this will be automatically selected)
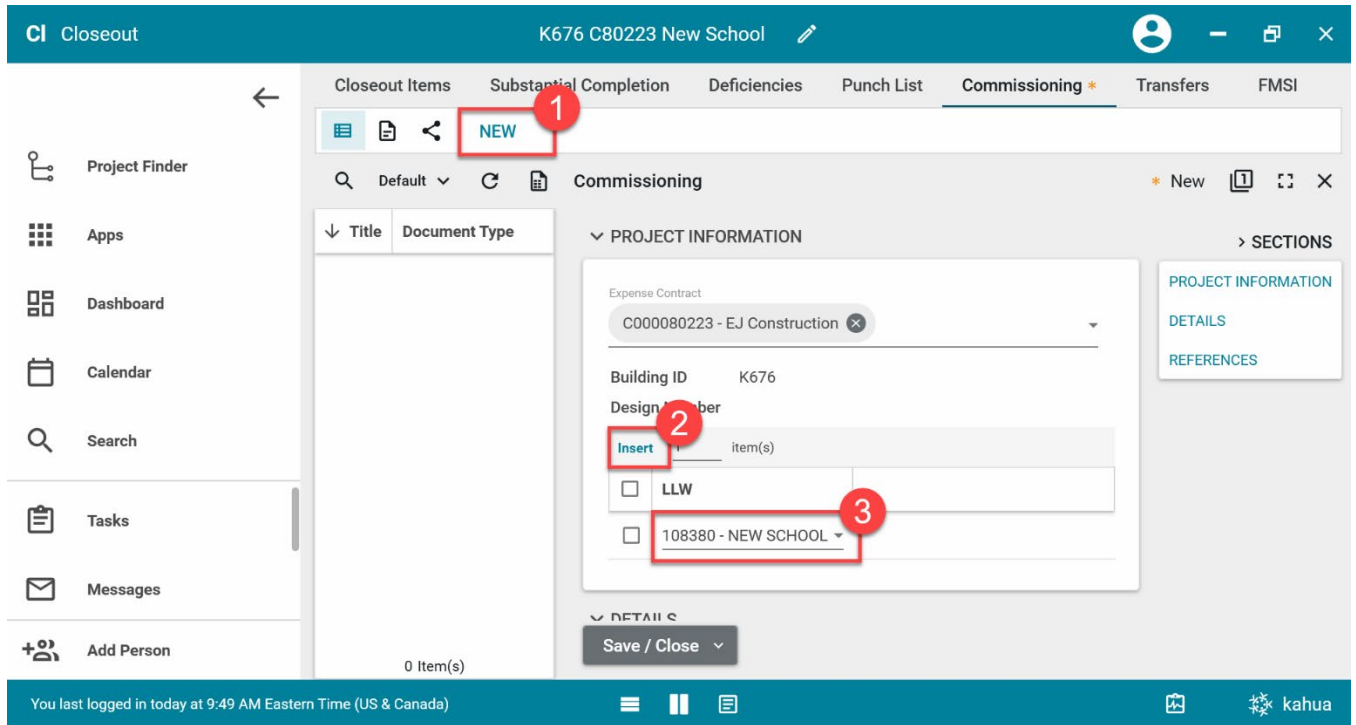


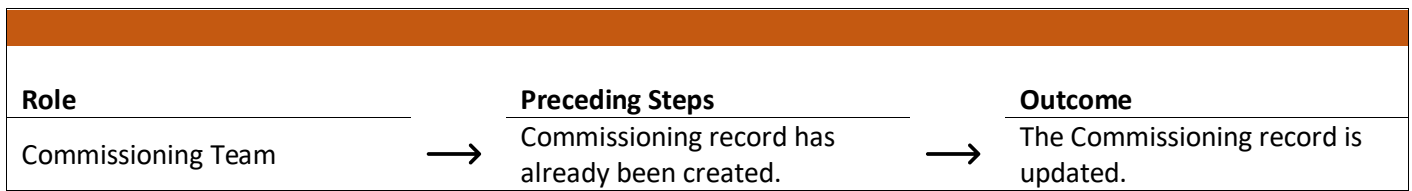4.  Enter the required fields: Title, Document Type > In the References section, select 'Upload' to attach a file
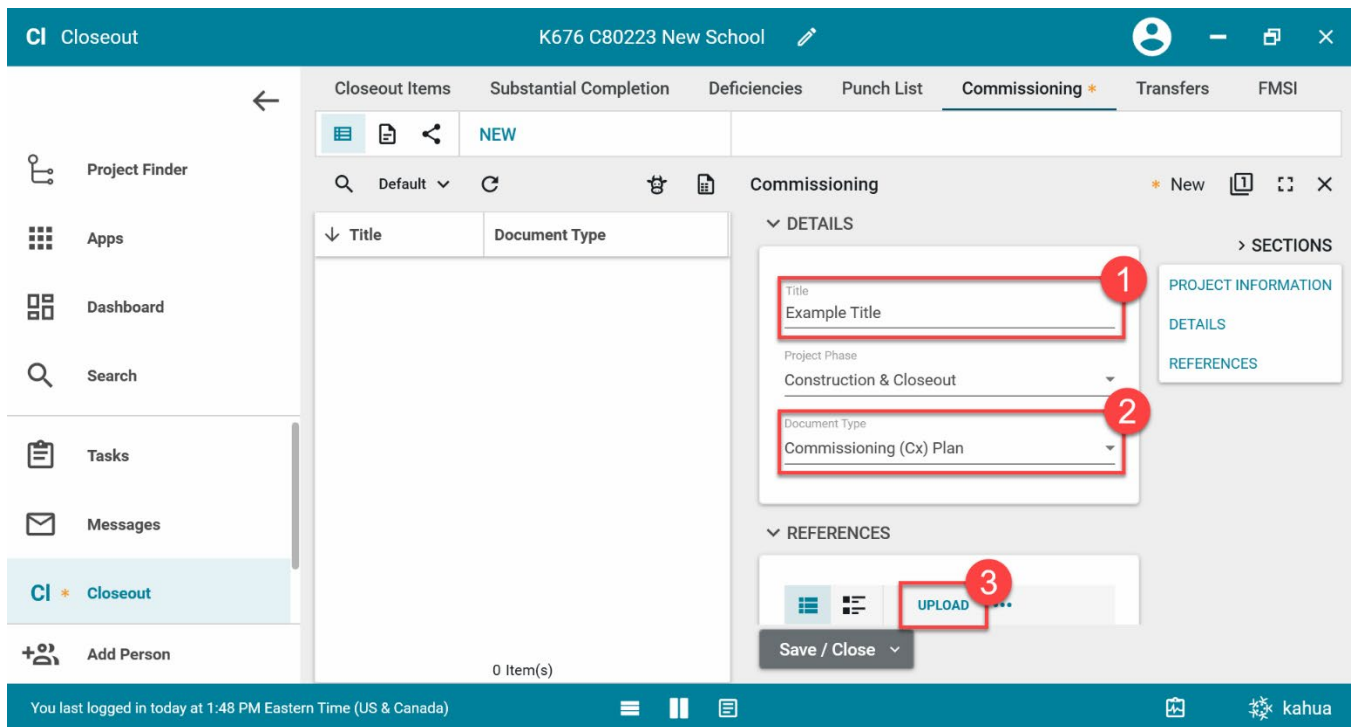


**Note:** The available Document Types will change depending on the Project Phase dropdown. By default, the Project Phase defaults to the Phase in the Portfolio Manager.

5. Click 'Save/Close'

## Edit Commissioning Record

| Role | | Preceding Steps | | Outcome |
|------|---|-----------------|---|---------|
| Commissioning Team | → | Commissioning record has already been created. | → | The Commissioning record is updated. |

**Steps**

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

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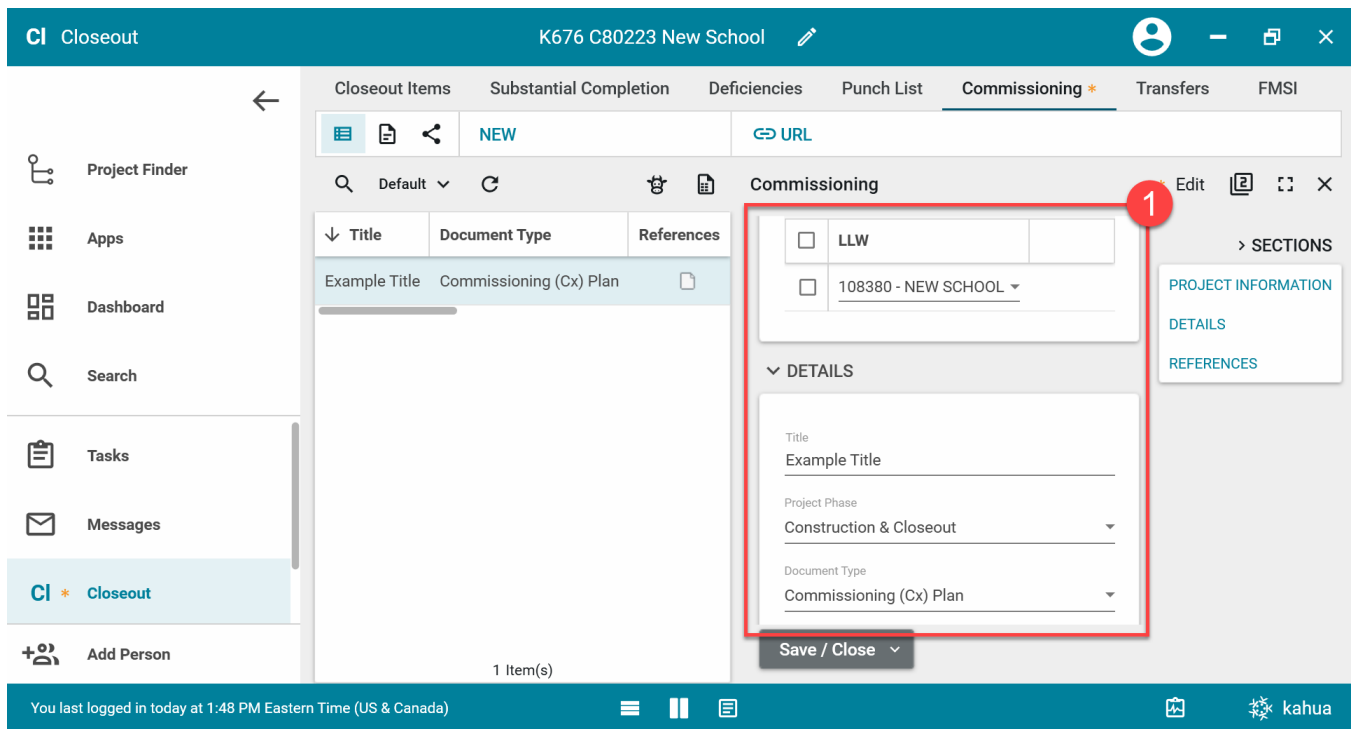


3. Deleting an attachment: In the References section, select the desired attachment. > Click 'Remove' in the bar above the table
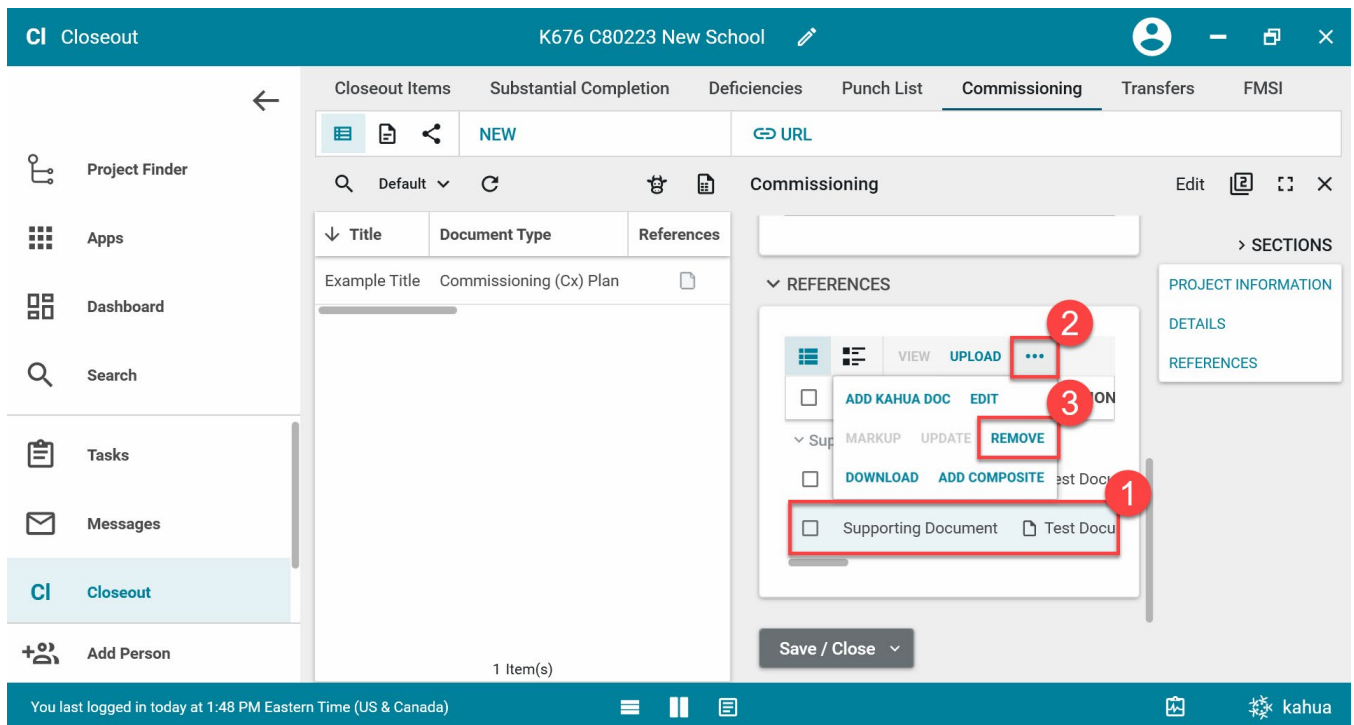


**Note:** You may have to click the ellipsis in the bar above the table to reveal all the options including remove.

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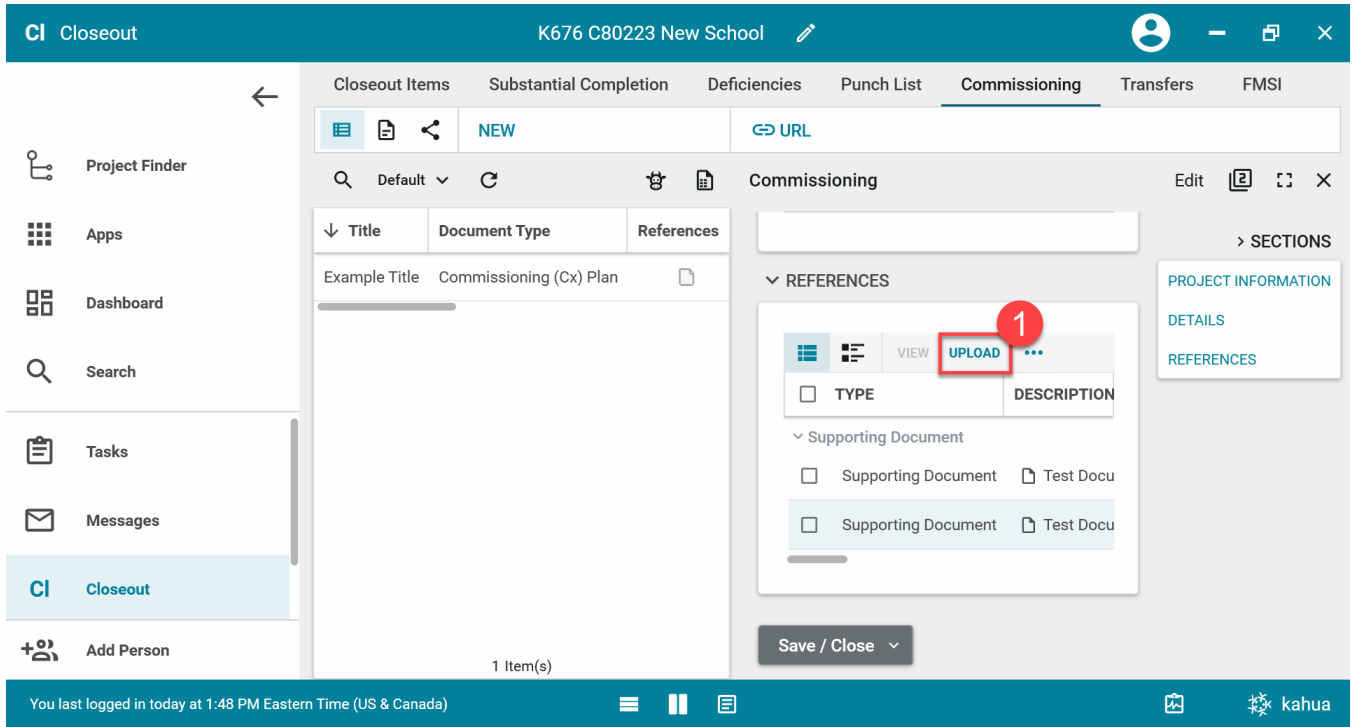


5. Click 'Save/Close' to commit changes
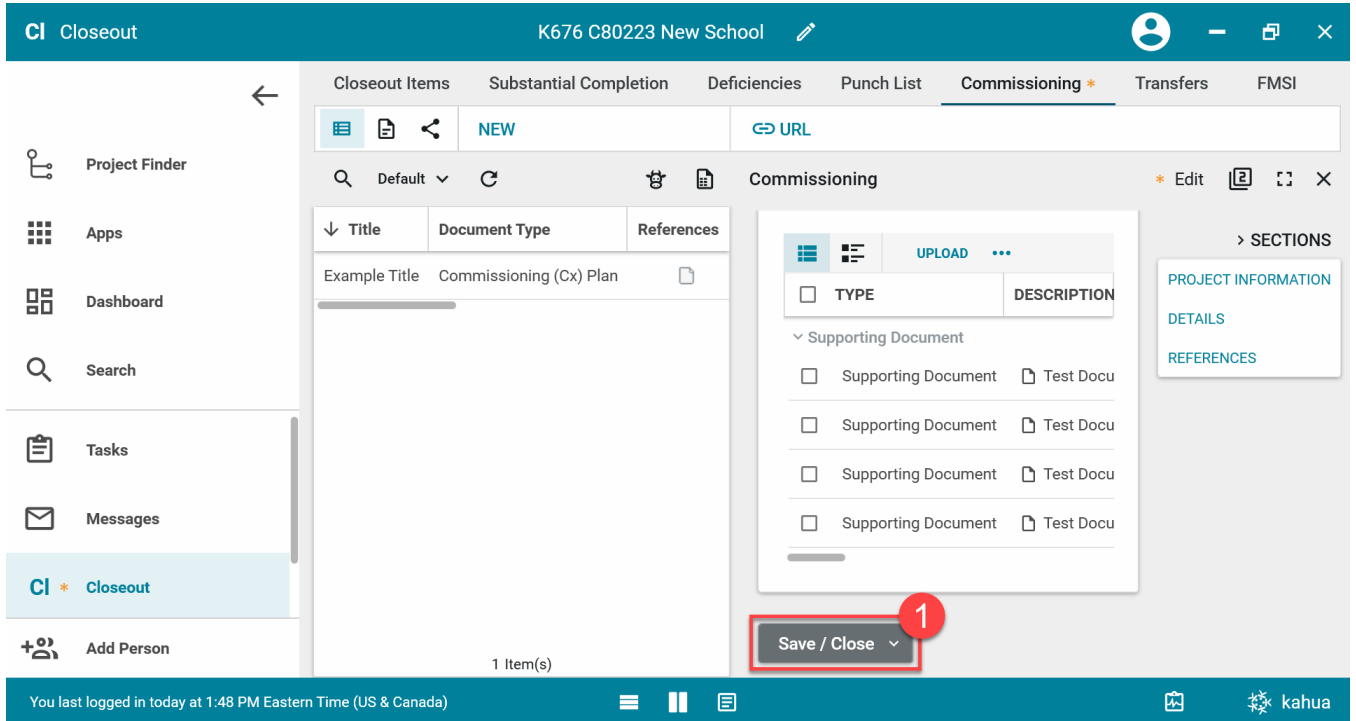
## Generate Final Report

| Role | Preceding Steps | Outcome |
|------|-----------------|---------|
| Commissioning Team $\longrightarrow$ | Commissioning records have already been created. $\longrightarrow$ | A Commissioning record is created specifically for the final report. This record contains the attachments from the records. A composite file is generated, compiling together the different attachments into a single pdf. |

**Steps**

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

2. 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'

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

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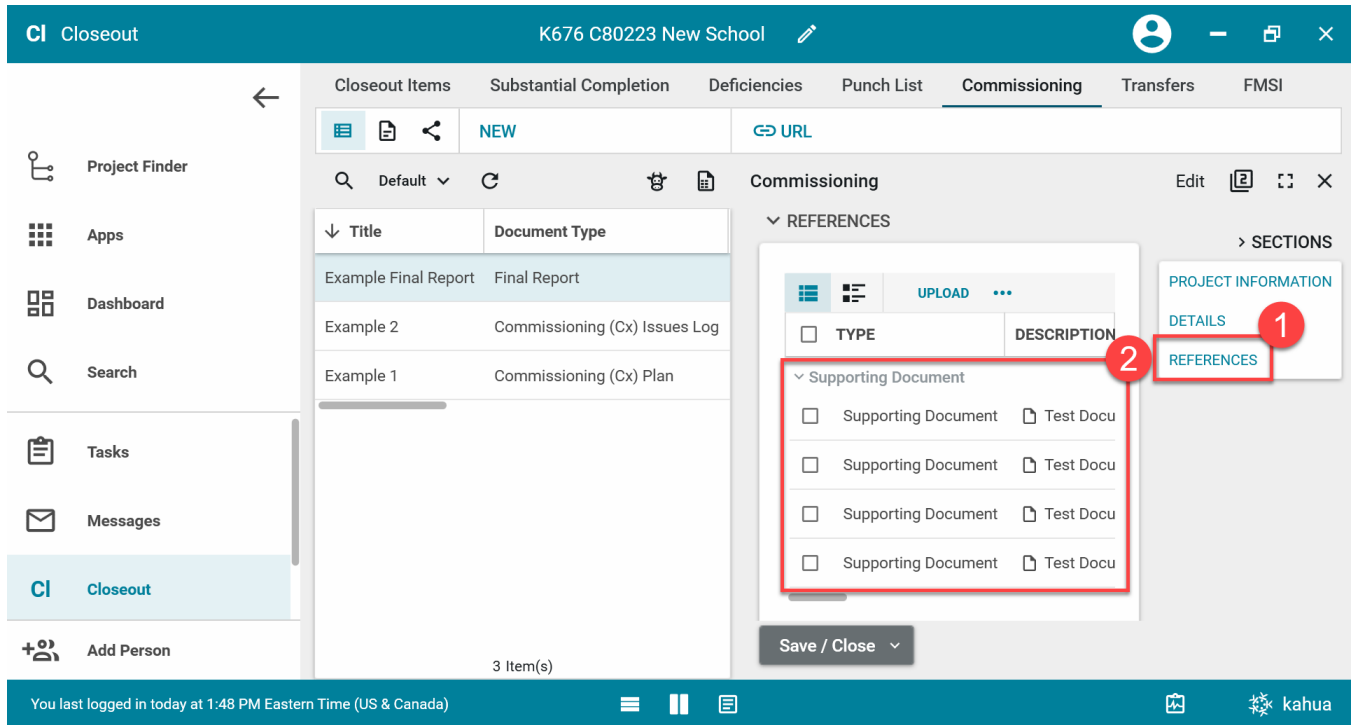


5. Select the 'Add Composite' button in the bar above the list of files (you may need to select '...' to display the button)
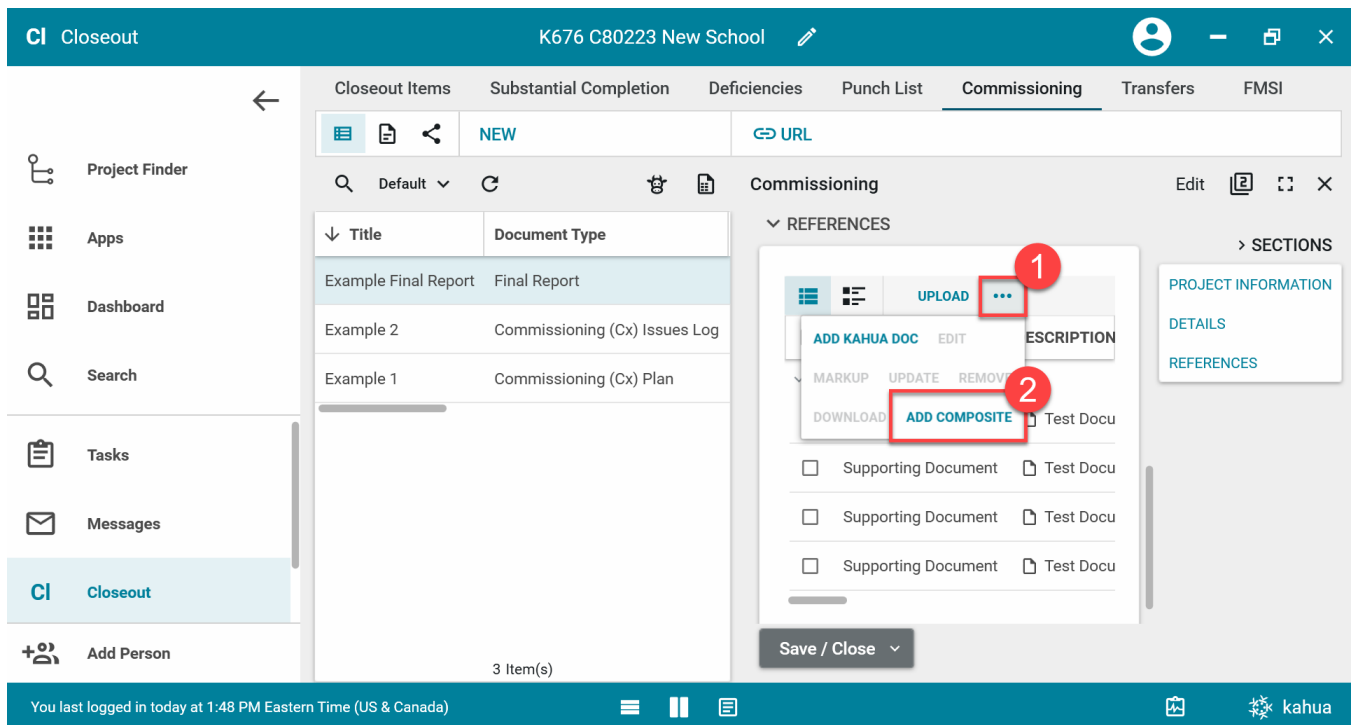
6. In the pop-up window, enter in a Filename > Use the checkboxes in the 'Include' column to select the attachments that you wish to compile together > At the rightmost column of the table, use the up and down buttons to change the order of the documents > Select 'Ok'



7. Click 'Save/Close'



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

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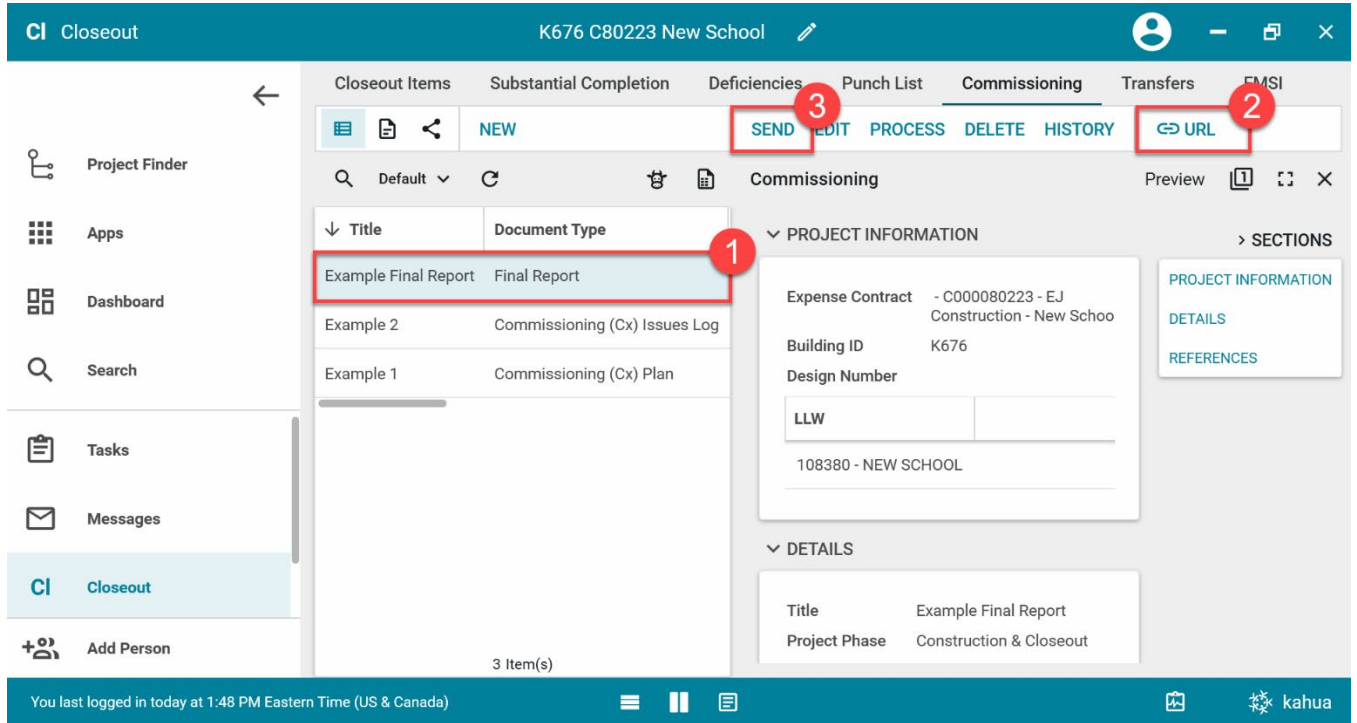


9. Choose Kahua contact(s) to send the message to > Enter a message subject > Paste the copied link in the message body along with any other details > Click 'Send'