

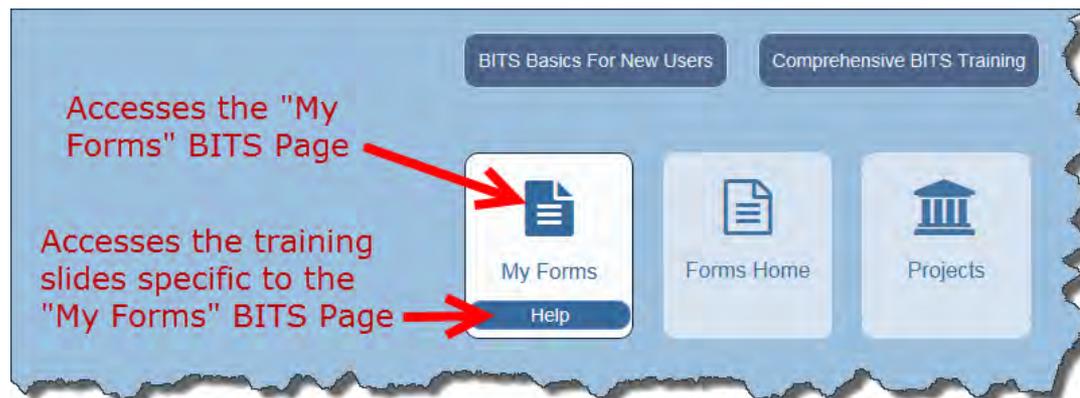
Building Information Tracking System

**Comprehensive BITS Training
for Agency Users**

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

Comprehensive BITS Training

- This **Comprehensive BITS Training** slideshow contains approximately 140 slides covering the following BITS pages/topics, in this order:
 - **My Forms**
 - **Forms Home**
 - **Projects**
 - **Reports**
 - **Documents**
 - **System Alerts**
 - **My Settings**
- It is recommended that first time BITS users review these comprehensive training slides in their entirety, after first reviewing the **BITS Basics for New Users** slides
- The seven topics listed above are also available individually by clicking on the embedded “Help” icon within each of the page icons, for example:



Building Information Tracking System

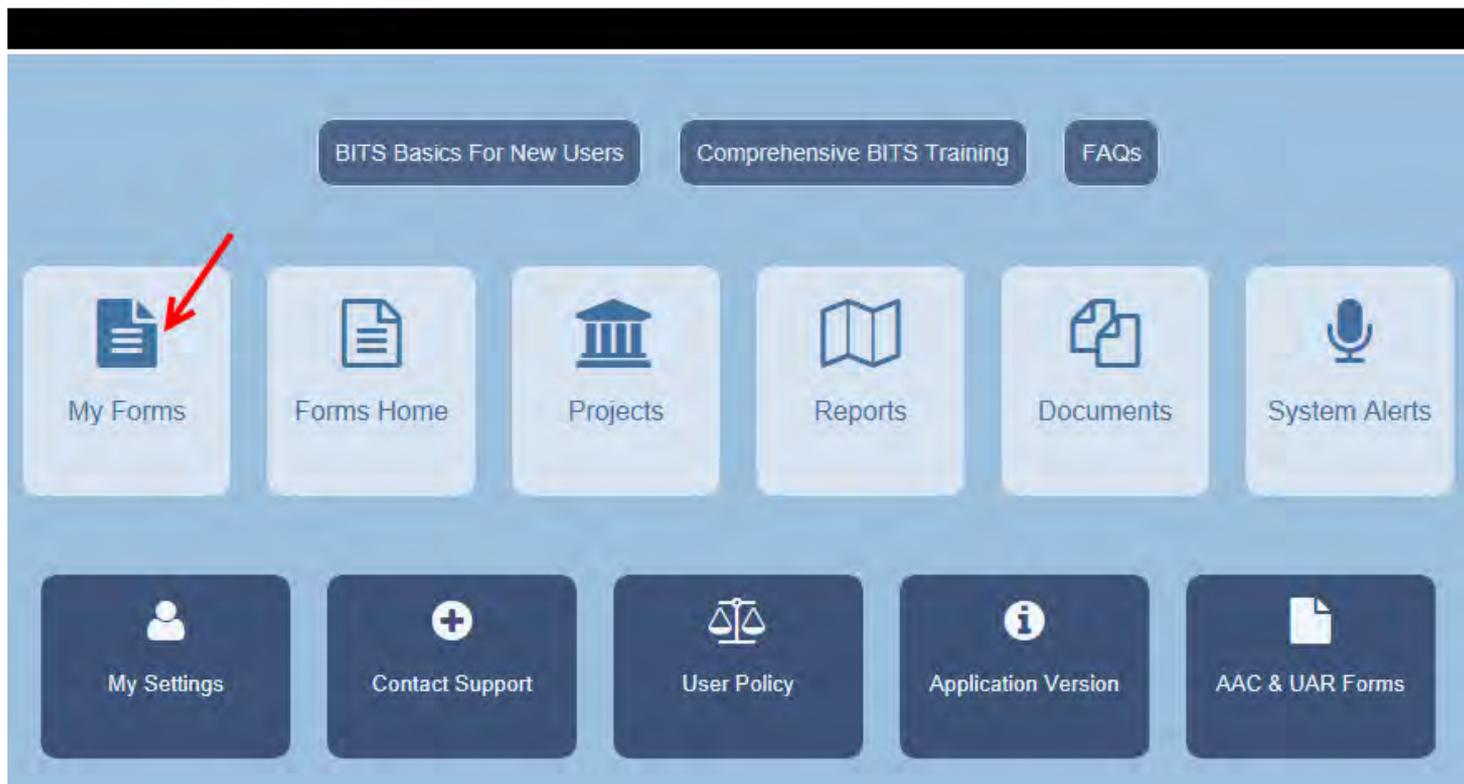
“My Forms”

*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:

BITS Home Page



“My Forms” Page (cont’d)

- 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 any of them 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:



Form Status:



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.

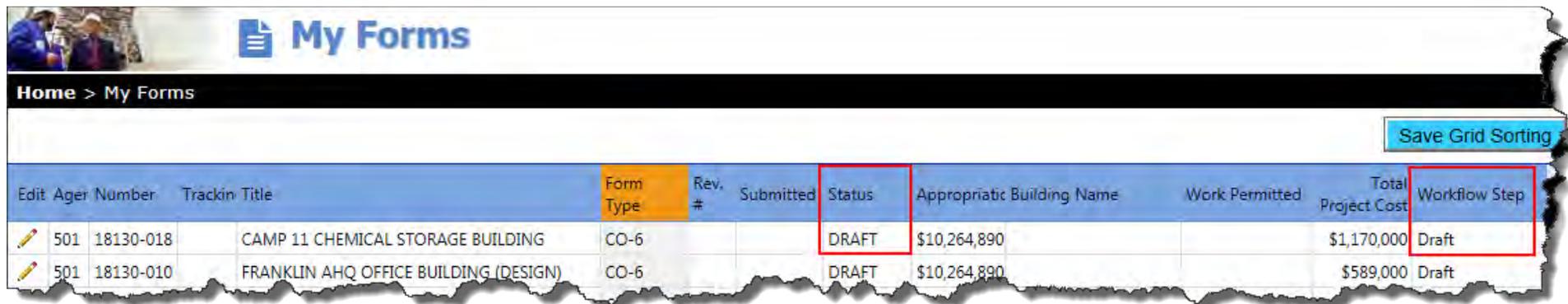
While a form is “IN PROCESS”, it is routed for processing thru various BCOM staff for action.

* - 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. (This usually means BCOM is awaiting additional information from the agency or AE).

“My Forms” Page (cont’d)

- Below is an example “My Forms” Page
- In this example, the form is in the DRAFT status, which means the form is being composed by the agency
- Notice from the previous slide, there are two distinct steps, under the DRAFT status, 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



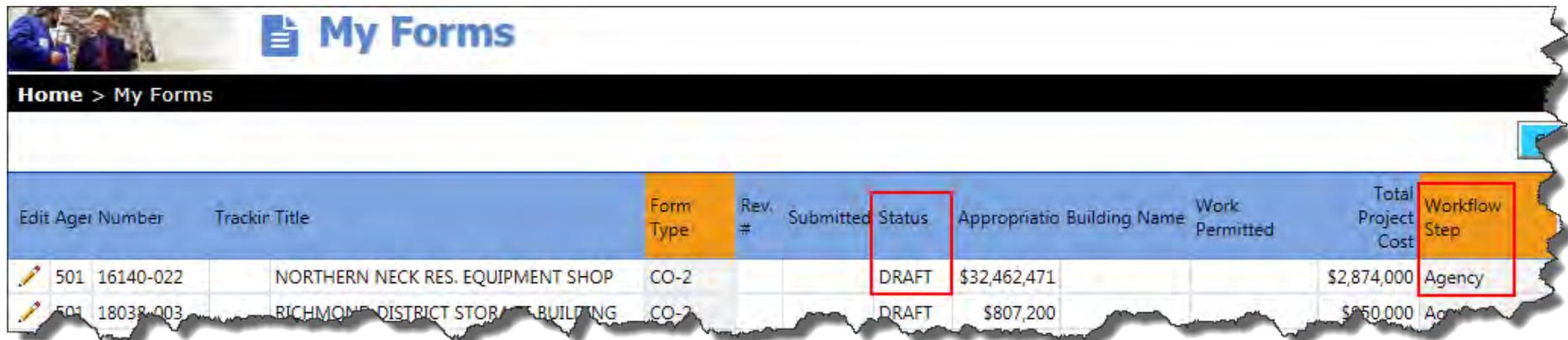
Home > My Forms

Save Grid Sorting

Edit	Age	Number	Trackin	Title	Form Type	Rev. #	Submitted	Status	Appropriatic Building Name	Work Permitted	Total Project Cost	Workflow Step
	501	18130-018		CAMP 11 CHEMICAL STORAGE BUILDING	CO-6			DRAFT	\$10,264,890		\$1,170,000	Draft
	501	18130-010		FRANKLIN AHQ OFFICE BUILDING (DESIGN)	CO-6			DRAFT	\$10,264,890		\$589,000	Draft

“My Forms” Page (cont’d)

- Below is another example “My Forms” Page
- In this example, the form is still in the DRAFT status, 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



The screenshot shows the 'My Forms' page with a table of forms. The table has columns for Edit, Ager Number, Trackin Title, Form Type, Rev. #, Submitted, Status, Appropriatio, Building Name, Work Permitted, Total Project Cost, and Workflow Step. Two forms are listed, both in DRAFT status. The 'Status' and 'Workflow Step' columns are highlighted with red boxes.

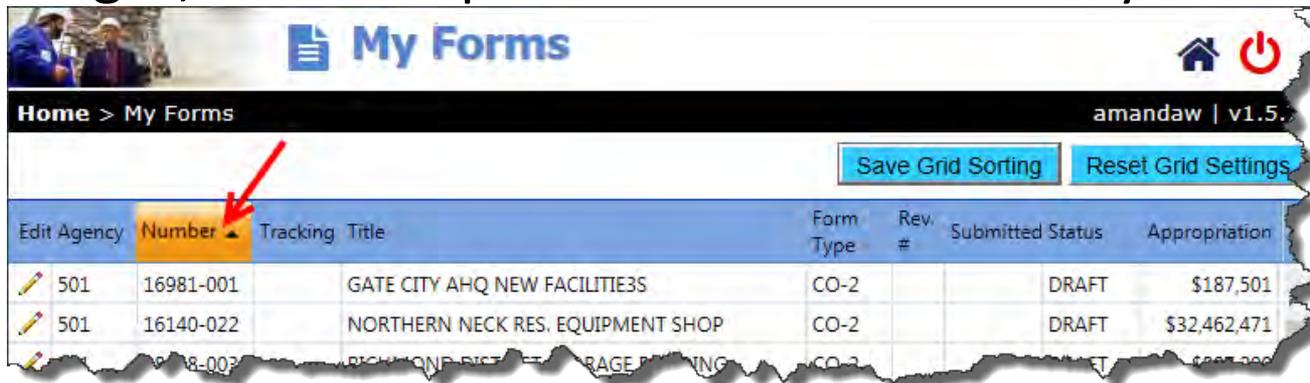
Edit	Ager Number	Trackin Title	Form Type	Rev. #	Submitted	Status	Appropriatio	Building Name	Work Permitted	Total Project Cost	Workflow Step
	501 16140-022	NORTHERN NECK RES. EQUIPMENT SHOP	CO-2			DRAFT	\$32,462,471			\$2,874,000	Agency
	501 18038-003	RICHMOND DISTRICT STORAGE BUILDING	CO-2			DRAFT	\$807,200			\$950,000	Agency

“My Forms” Page (cont’d)

- 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 other 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 (cont’d)

- 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
- Please refer to the Forms Home Page for instructions on making these changes, as the steps are identical for the My Forms page



The screenshot shows the 'My Forms' page interface. At the top, there is a navigation bar with 'Home > My Forms' and a user profile 'amandaw | v1.5'. Below the navigation bar, there are two buttons: 'Save Grid Sorting' and 'Reset Grid Settings'. The main content is a table with columns: 'Edit Agency', 'Number', 'Tracking', 'Title', 'Form Type', 'Rev. #', 'Submitted', 'Status', and 'Appropriation'. A red arrow points to the 'Number' column header, which has a small downward arrow indicating it is sorted. The table contains three rows of data.

Edit Agency	Number	Tracking	Title	Form Type	Rev. #	Submitted	Status	Appropriation
501	16981-001		GATE CITY AHQ NEW FACILITIES	CO-2			DRAFT	\$187,501
501	16140-022		NORTHERN NECK RES. EQUIPMENT SHOP	CO-2			DRAFT	\$32,462,471
	16148-002		RICHMOND DISTRICT STORAGE BUILDING	CO-2			DRAFT	\$2,200,000

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

Building Information Tracking System

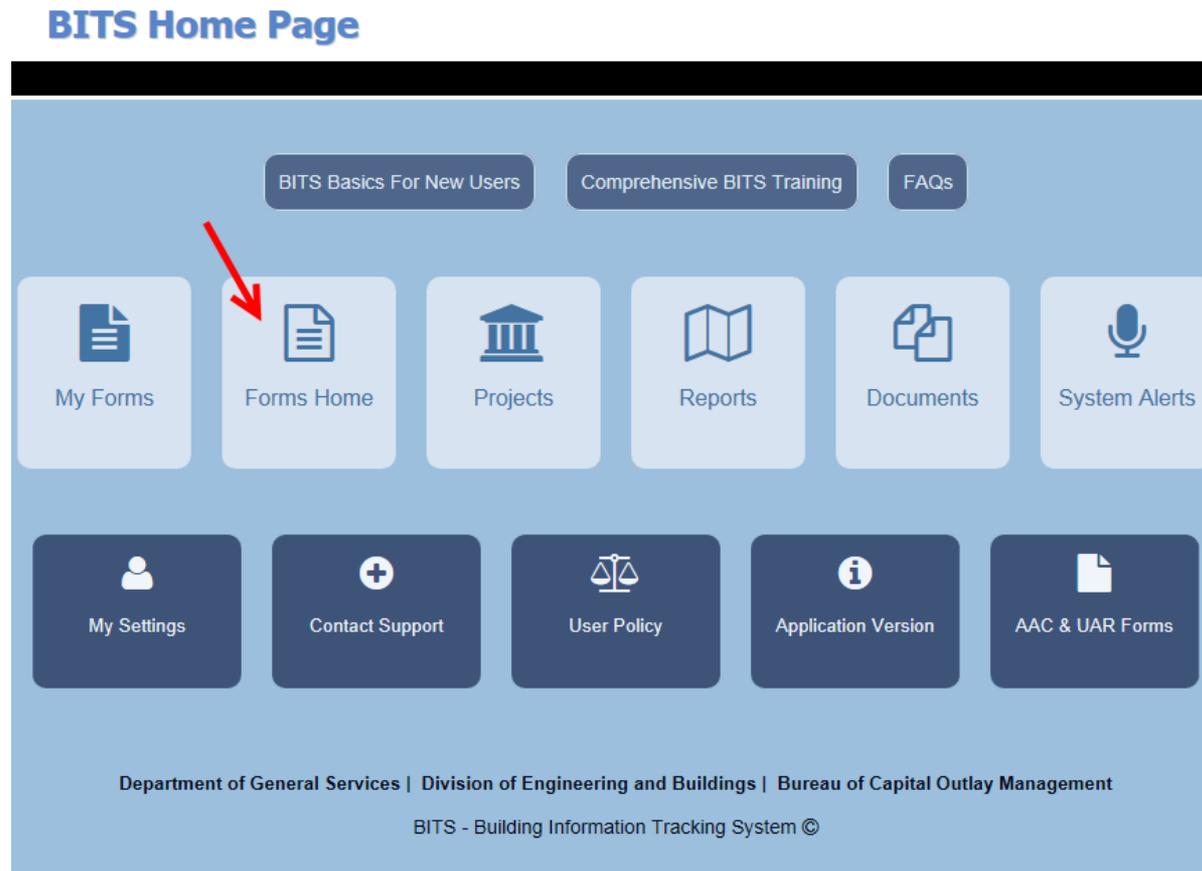
“Forms Home Page”

How to View, Create, Edit, Process and Print BO and CO Forms

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

Forms Home Page (cont'd)

- The “Forms Home Page” can be accessed from the BITS Home Page:



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 (cont'd)

- 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 or click the pencil icon in the Edit column

The screenshot shows the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page' and a version indicator 'alee | v1.5'. Below the navigation bar, there is a search area for 'Project Number' and a 'Show All Filter Settings' button. A filter bar indicates 'View & Edit or Copy Existing Forms, Filter: Form Type = All BO Forms, Subproject Title = acqu'. The main content is a table with the following columns: Edit, Print, Copy Form To, Agency, Number, Tracking, SubProject Title, Form Type, Rev. #, Final Submitted, Status, Approved Date, Appropriation, Total Project Cost, Building Name, Work Permitted, Effective Date, and Workflow Step. The table contains five rows of data, each representing a different form entry. Below the table, there is a section for 'Add New Empty Form' with a dropdown menu for 'Form Type'.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type	Rev. #	Final Submitted	Status	Approved Date	Appropriation	Total Project Cost	Building Name	Work Permitted	Effective Date	Workflow Step
		--Select	501	16163-000		ACQUISITION: LAND FOR PINE CHAPEL AREA HEADQUARTERS	CO-17			APPROVED			\$0	SPREADER RACK STRUCTURE	Full Building		Distributed
		--Select	501	16163-000		ACQUISITION: LAND FOR PINE CHAPEL AREA HEADQUARTERS	CO-17			APPROVED			\$0	CHEMICAL STORAGE FACILITY	Full Building		Distributed
		--Select	217	16233-000		DAVIS STREET ACQUISITION	CO-17			APPROVED	12/23/1999	\$30,820	\$0	HARRIS THEATER	Full Building	12/23/1999	Distributed
		--Select	217	16233-000		DAVIS STREET ACQUISITION	CO-17			APPROVED	12/23/1999	\$30,820	\$0	THOMPSON HALL	Full Building	12/23/1999	Distributed
		--Select	217	16233-000		DAVIS STREET ACQUISITION	CO-17			APPROVED	12/23/1999	\$30,820	\$0	LECTURE HALL	Full Building	12/23/1999	Distributed

Add New Empty Form (Click on the form to add from the list below)

Form Type: --Select the form type to add--

Forms Home Page (cont'd)

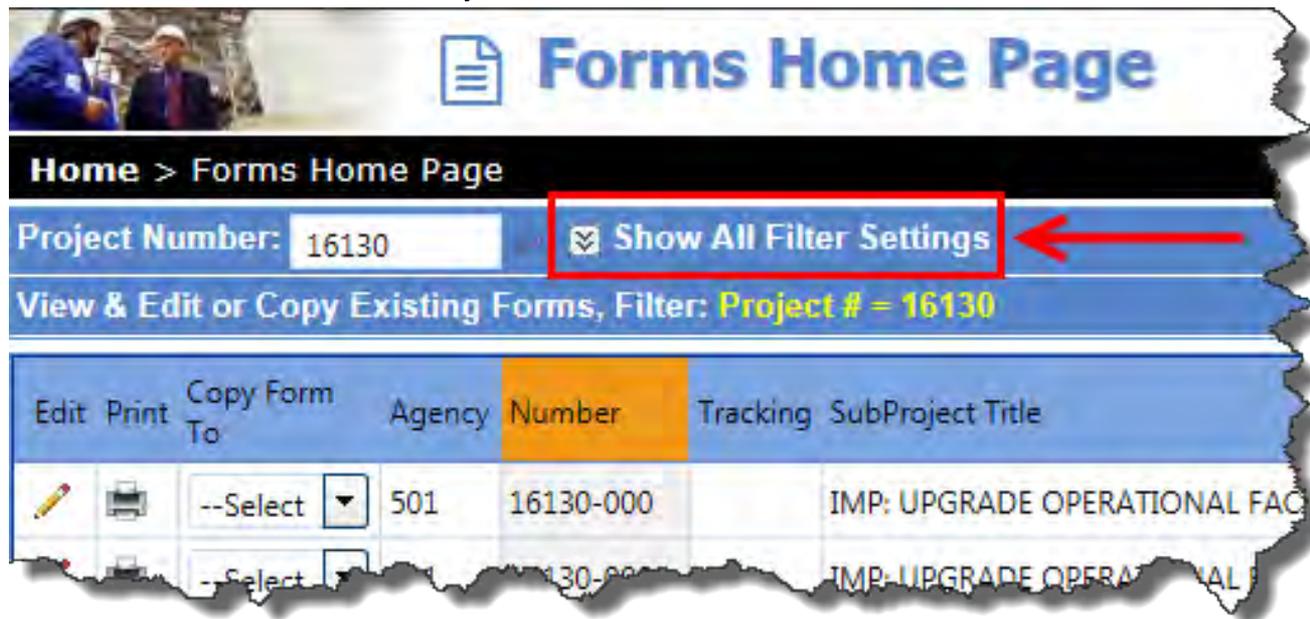
- Following is an example Forms Home Page, with filters shown
- The area encircled by the red box below is the filter area
- Filters are explained in more detail on subsequent pages

The screenshot displays the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Forms Home Page' and a URL: 'Term Store Management Tool https://sp.dgs.virginia.gov/sites/BCOM/crprv/_layouts/15/termstoremanager.aspx'. The page title is 'Home > Forms Home Page' and the version is 'alee | v1.5'. Below the navigation bar, there is a search bar for 'Project Number' with the value '16130' and a 'Hide Filter Settings' button. The main content area is titled 'View & Edit or Copy Existing Forms, Filter: Project # = 16130'. A red box highlights the 'Filter Settings' section, which includes various dropdown menus and text input fields for filtering forms. Below the filter settings are buttons for 'Apply Filter', 'Clear Filter', 'Save Grid Sorting', and 'Reset Results Grid'. A small red text note below the filter settings reads: 'You must click the "Apply Filter" button to apply the filters.' Below the filter settings is a data table with the following columns: Edit, Print, Copy Form To, Agency, Number, Tracking, SubProject Title, Form Type, Rev. #, Final Submitted, Status, Approved Date, Appropriation, Total Project Cost, Building Name, Work Permitted, Effective Date, and Workflow Step. The table contains one row of data.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type	Rev. #	Final Submitted	Status	Approved Date	Appropriation	Total Project Cost	Building Name	Work Permitted	Effective Date	Workflow Step
		--Select	501	16130-000		IMP: UPGRADE OPERATIONAL FACILITIES	CO-2	4	06/29/2010	APPROVED	08/13/2010	\$13,070,088	\$0				Distributed

“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”

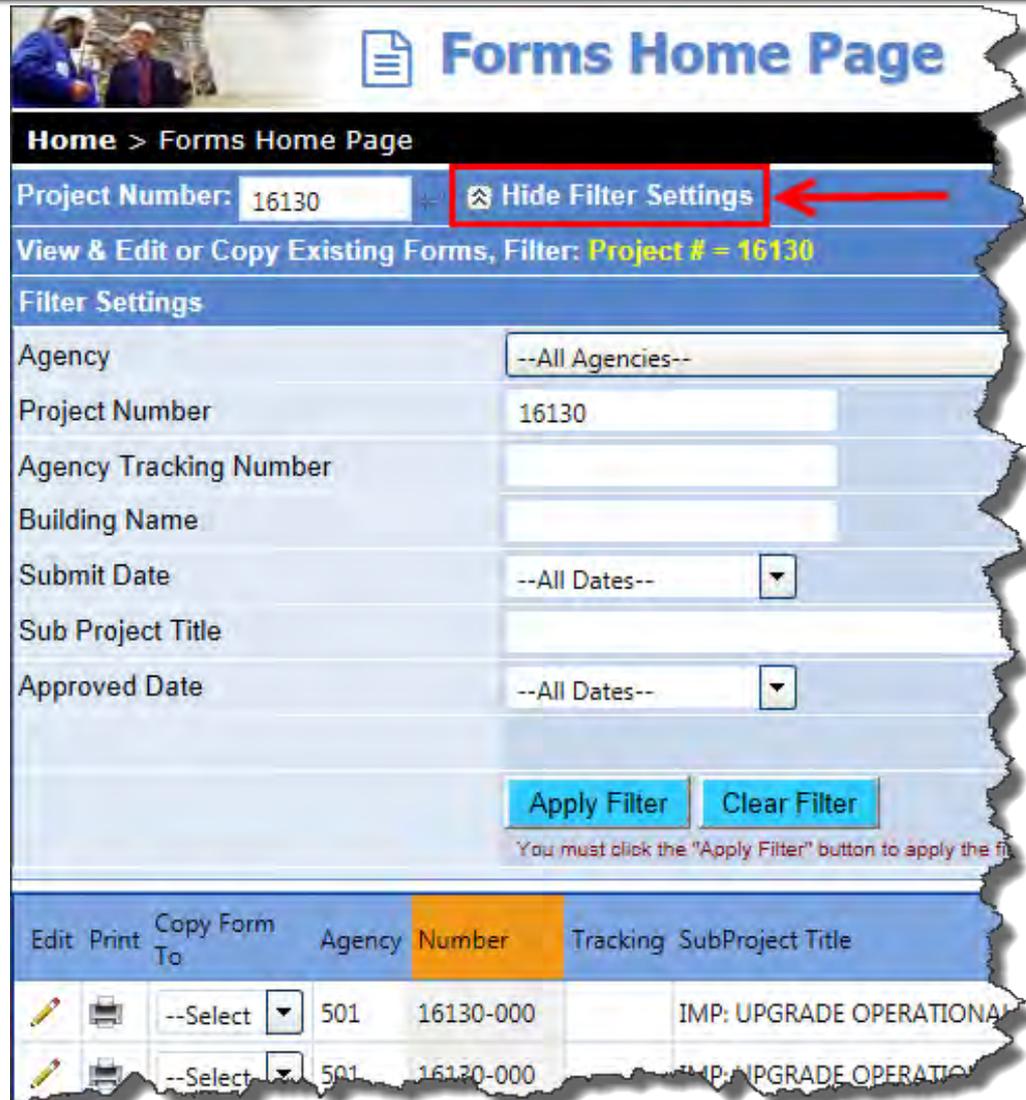


The screenshot displays the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page'. Below this, a search bar shows 'Project Number: 16130'. A red box highlights the 'Show All Filter Settings' button, with a red arrow pointing to it from the right. Below the search bar, a blue banner indicates 'View & Edit or Copy Existing Forms, Filter: Project # = 16130'. The main content area is a table with columns: Edit, Print, Copy Form To, Agency, Number, Tracking, and SubProject Title. The first row shows a form with Agency 501 and Number 16130-000, titled 'IMP: UPGRADE OPERATIONAL FAC'. The second row is partially visible with Agency 1 and Number 130-00.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title
		--Select	501	16130-000		IMP: UPGRADE OPERATIONAL FAC
		--Select	1	130-00		IMP: UPGRADE OPERATIONAL FAC

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 filter area visible again, click on “Show All Filter Settings”



The screenshot shows the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page'. Below this, a search bar contains 'Project Number: 16130' and a button labeled 'Hide Filter Settings' with a red arrow pointing to it. The main content area is titled 'View & Edit or Copy Existing Forms, Filter: Project # = 16130'. Underneath is a 'Filter Settings' section with several input fields: Agency (dropdown: --All Agencies--), Project Number (text: 16130), Agency Tracking Number (empty), Building Name (empty), Submit Date (dropdown: --All Dates--), Sub Project Title (empty), and Approved Date (dropdown: --All Dates--). At the bottom of the filter section are 'Apply Filter' and 'Clear Filter' buttons. A note below the buttons reads: 'You must click the "Apply Filter" button to apply the filter'. Below the filter section is a table with columns: Edit, Print, Copy Form To, Agency, Number, Tracking, and SubProject Title. The table contains two rows of data, both with 'Agency' 501 and 'Number' 16130-000. The 'SubProject Title' for both rows is 'IMP: UPGRADE OPERATIONAL'.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title
		--Select	501	16130-000		IMP: UPGRADE OPERATIONAL
		--Select	501	16130-000		IMP: UPGRADE OPERATIONAL

Forms Home Page Filters

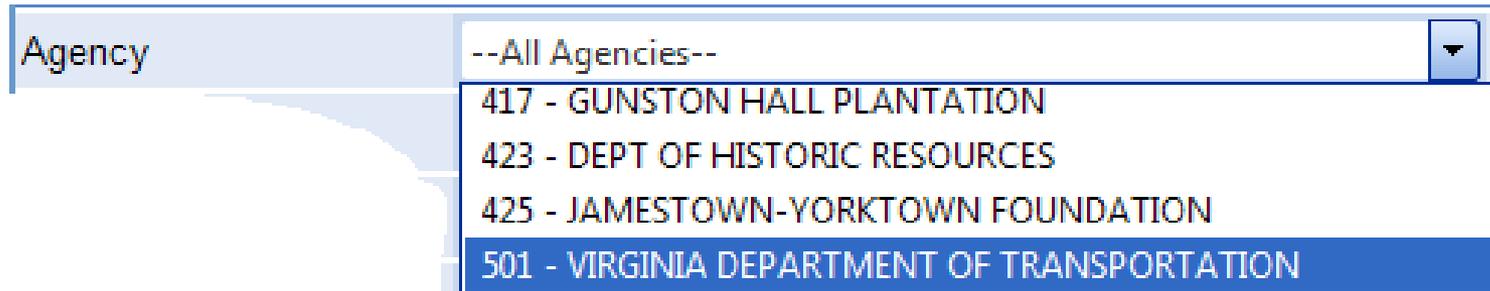
- Below are the filters available for the Forms Home Page

Filter Settings			
Agency	--All Agencies--		
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--
Sub Project Title		Expiration Date	--All Dates--
Approved Date	--All Dates--	Final	--All--
		Project Completed	--All--
Apply Filter Clear Save Cancel Reset Results			

- 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

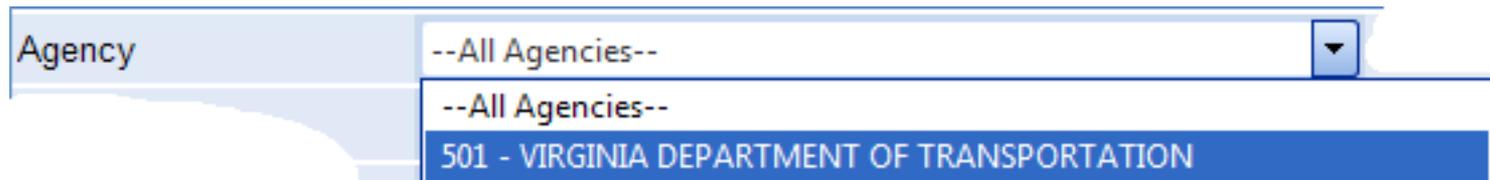
- Central agency users (such as APA and DPB) can filter on all agencies, or on specific agencies, to view project form data



A screenshot of a web application's filter interface. On the left, a light blue box contains the label "Agency". To its right is a dropdown menu with a white background and a blue border. The menu is open, showing a list of options. The top option is "--All Agencies--" with a small downward arrow icon on the right. Below it are four agency names: "417 - GUNSTON HALL PLANTATION", "423 - DEPT OF HISTORIC RESOURCES", "425 - JAMESTOWN-YORKTOWN FOUNDATION", and "501 - VIRGINIA DEPARTMENT OF TRANSPORTATION". The last option is highlighted with a blue background.

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



A screenshot of a web application's filter interface, similar to the one above. The "Agency" label is on the left. The dropdown menu is open, showing a limited list of options. The top option is "--All Agencies--" with a small downward arrow icon on the right. Below it is another "--All Agencies--" option, and at the bottom is "501 - VIRGINIA DEPARTMENT OF TRANSPORTATION", which is highlighted with a blue background.

Agency	--All Agencies--
	--All Agencies--
	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION

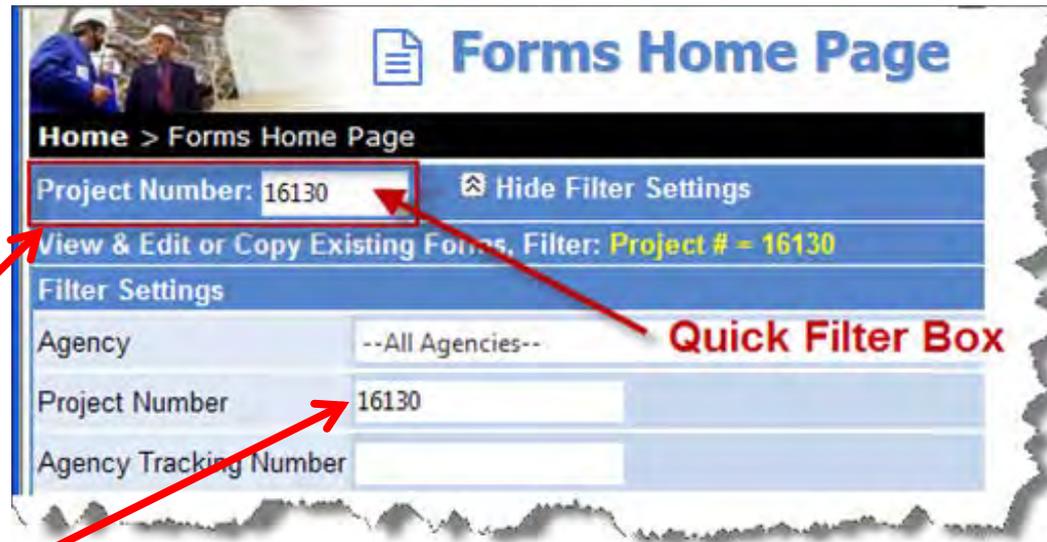
The “Project Number” Filter

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 #'s
- 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



The screenshot displays the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page'. Below this, a 'Project Number: 16130' field is highlighted with a red box and labeled 'Quick Filter Box'. To the right of this field is a 'Hide Filter Settings' button. Below the quick filter, a blue bar indicates the current filter: 'View & Edit or Copy Existing Forms, Filter: Project # - 16130'. Underneath, the 'Filter Settings' section includes three input fields: 'Agency' (set to '--All Agencies--'), 'Project Number' (set to '16130'), and 'Agency Tracking Number' (empty). Red arrows point from the text in the list to the quick filter box and the Project Number field in the filter settings.

Project Number "Quick Filter" Box (cont'd)

After entering a new project number, click 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

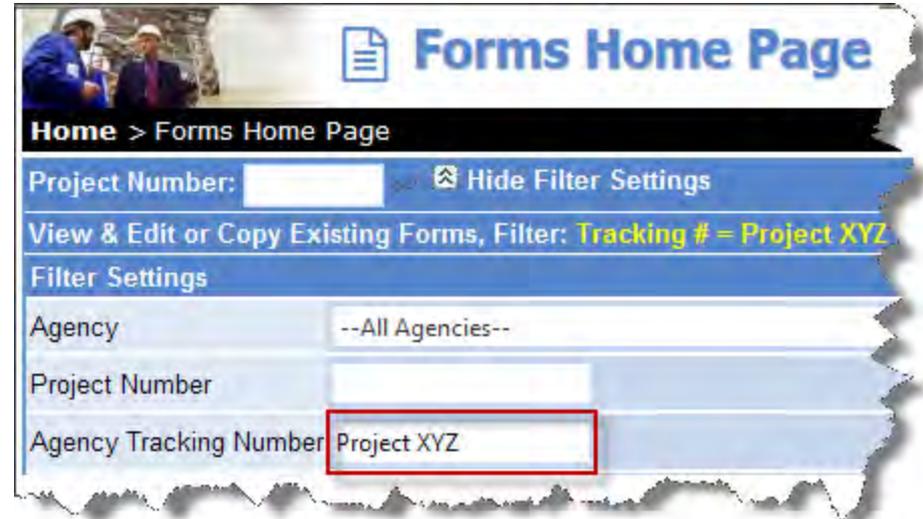
Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title
		--Sele <input type="button" value="v"/>	501	16130-000		IMP: UPGRADE OPERATIONAL
		--Sele <input type="button" value="v"/>	501	16130-000		IMP: UPGRADE OPERATIONAL
		--Sele <input type="button" value="v"/>	501	16130-000		IMP: UPGRADE OPERATIONAL

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

CAUTION: Although the other filters are hidden, their settings are still in effect. To change them, the user must access the full filter area.

“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 screenshot shows the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page'. Below this, there is a search bar for 'Project Number' and a 'Hide Filter Settings' button. A filter is applied: 'View & Edit or Copy Existing Forms, Filter: Tracking # = Project XYZ'. The 'Filter Settings' section includes three fields: 'Agency' (set to '--All Agencies--'), 'Project Number' (empty), and 'Agency Tracking Number' (set to 'Project XYZ'). The 'Agency Tracking Number' field is highlighted with a red box.

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).

Date Filters

- **Submit Date** - the date that a form was submitted by an agency to BCOM
- **Approved Date** - the date the form was approved and distributed
- **Expiration Date** – Used primarily by BO Forms, the date a temporary BO form will expire
- 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--

Expiration Date --All Dates--

Approved Date --All Dates--

--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.)

The screenshot shows a dropdown menu titled "Form Type" with a current selection of "--All Forms--". The menu is open, displaying a list of form types. The list is divided into two main sections: "CO Forms" and "BO Forms", indicated by red arrows and labels on the right side of the menu. The "CO Forms" section includes: 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-8, Approval to Award Construction Contract; CO-11, Construction Change Order Log; and CO-14, Project Completion Report. The "BO Forms" section includes: 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; 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 Manufactured Home; CO-13.3 TWR, Certificate of Use and Occupancy for a Tower; and CO-13.4, Building Permit Close Out.

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

“Status” Filter

- In BITS the “Status” identifies the stage of the form within the workflow process, or the final disposition of the form
- You can check multiple checkboxes (as shown) to filter on one or more than one status
- See the next slide for a description of each Status identifier

The screenshot shows a 'Status' filter dropdown menu. The dropdown is open, displaying a list of status options with checkboxes. The header of the dropdown indicates '4 items checked'. The checked items are DRAFT, VOIDED, ON HOLD, and FILE COPY. The unchecked items are --All (All/Any Status)--, IN PROCESS, and APPROVED. The REJECTED option is also present but has a dotted border around its checkbox.

Status	Checked
--All (All/Any Status)--	<input type="checkbox"/>
DRAFT	<input checked="" type="checkbox"/>
IN PROCESS	<input type="checkbox"/>
APPROVED	<input type="checkbox"/>
VOIDED	<input checked="" type="checkbox"/>
ON HOLD	<input checked="" type="checkbox"/>
REJECTED	<input type="checkbox"/>
FILE COPY	<input checked="" type="checkbox"/>

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:



Form Status:



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. (This usually means BCOM is awaiting additional information from the agency or AE).

Filters Primarily Used for BO Forms

- **Work Permitted** - may include items such as “Foundation Only”, “Full Building”, “Early Sitework Package”, etc. Any portion of the text may be entered in the filter. For example, entering “Full” in the filter field should bring results similar to those shown.
- **Final** – Identifies the form is the final one required. Users can choose from Yes, No, or All options. This is primarily used to distinguish Final versus Temporary Certificates.
- **Project Completed** – Identifies if the project is complete and has all necessary documents and forms. User can choose from Yes, No, or All options.

Work Permitted					
Full					
Save Grid Sorting					
Reset Results Grid					
Approved Date	Appropriat	Total Project Cost	Building Name	Work Permitted	Effect Date
	\$3,972,000		VIRGINIA INDUSTRIES FOR THE BLIND - RICHMOND PLANT	Full Building	
	\$5,367,708		Wastewater Treatment Plant - Control Building	Full Building	

Final

--All--
Yes
No

Project Completed

--All--
Yes
No

Using Multiple Filters

- When combining filters, BITS uses what programmers refer to as “logical AND statements”
- This means that the forms returned must meet ALL of the specified filter conditions
- Be cautious when using multiple filters. They can sometimes narrow results too much.
- No form results will be displayed if no forms met ALL of the specified filter conditions.

The screenshot shows a software interface with a filter panel on the right and a data table below. The filter panel includes dropdown menus for 'Active Role' (set to '--All Roles--'), 'Form Type' (set to 'CO-2, Authority to Initiate Capital Outlay Project'), 'Status' (set to 'APPROVED'), 'Work Permitted', 'Close Out Dispensation' (set to '--All Close Out Dispensations--'), 'Expiration Date' (set to '--All Dates--'), 'Final' (set to '--All--'), and 'Project Completed' (set to '--All--'). There are two buttons: 'Save Grid Sorting' and 'Reset Results Grid'. The data table below has columns: SubProject Title, Form Type, Re Fin Submitted, Status, Approved Date, Appropriatio, and Total Project Cost. The table contains three rows of data, all with 'CO-2' as the Form Type and 'APPROVED' as the Status.

SubProject Title	Form Type	Re Fin Submitted	Status	Approved Date	Appropriatio	Total Project Cost
RENOVATIONS: BUILDINGS FOR WHICH DGS IS RESPONSIBLE	CO-2	0	APPROVED		\$1,154,000	\$2,231,141
RN: ELEV SUPREME COURT BLDG.	CO-2	0	APPROVED	04/22/1997	\$1,154,000	\$739,000
RN ELEV STATE CAPITOL LDG.	CO-2	0	APPROVED	04/24/1997	\$1,154,000	\$415,000

In the example above, the filtered results list only those forms which match both filters, i.e.: Form Type = “CO-2” AND Status = “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

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). Notice the color change in the sorted column’s header.

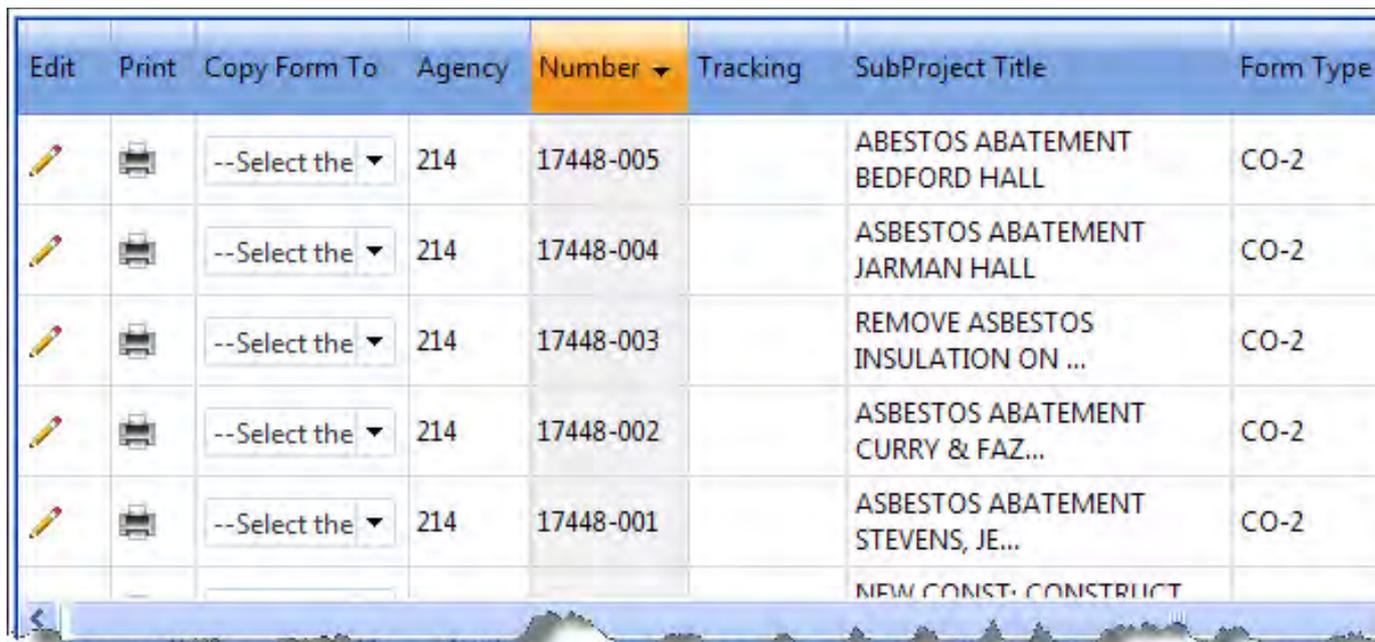


Edit	Print	Copy Form To	Agency	Number ▲	Tracking	SubProject Title	Form Type
		--Select the ▾	214	17324-000		NEW CONST: CONSTRUCT RECREATI...	CO-2
		--Select the ▾	214	17448-001		ASBESTOS ABATEMENT STEVENS, JE...	CO-2
		--Select the ▾	214	17448-002		ASBESTOS ABATEMENT CURRY & FAZ...	CO-2
		--Select the ▾	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

NOTE: The up/down arrows may or may not show based upon the particular Skin (i.e., pre-set color scheme) being used. Skins may be changed in the user’s “My Settings” page.

Sorting the Columns (cont.)

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

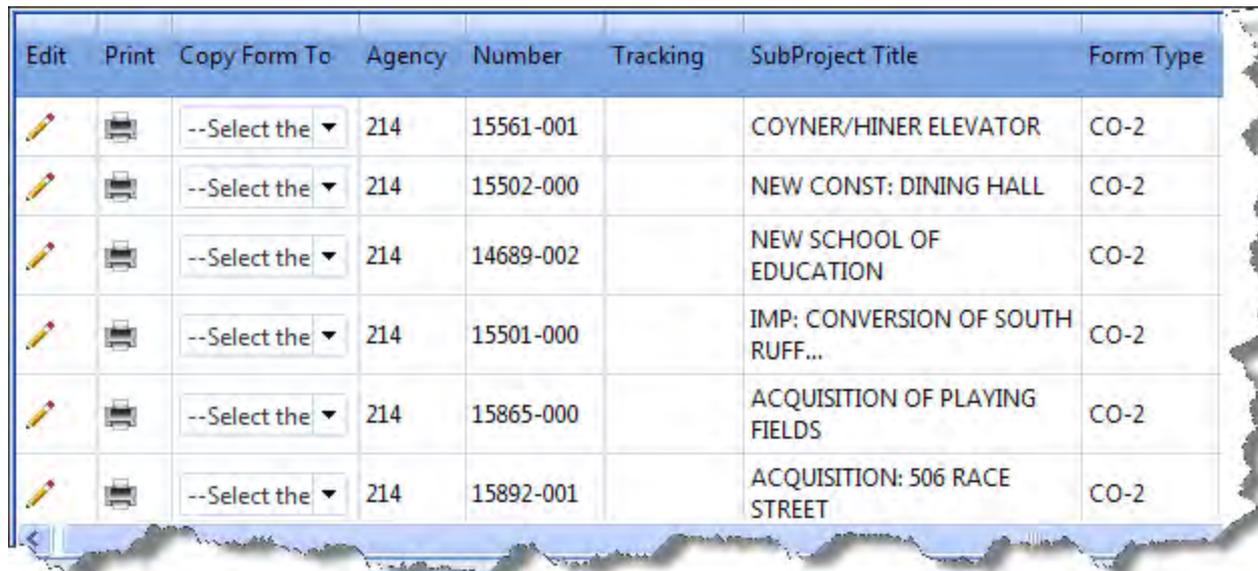


Edit	Print	Copy Form To	Agency	Number ▼	Tracking	SubProject Title	Form Type
		--Select the ▼	214	17448-005		ABESTOS ABATEMENT BEDFORD HALL	CO-2
		--Select the ▼	214	17448-004		ASBESTOS ABATEMENT JARMAN HALL	CO-2
		--Select the ▼	214	17448-003		REMOVE ASBESTOS INSULATION ON ...	CO-2
		--Select the ▼	214	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

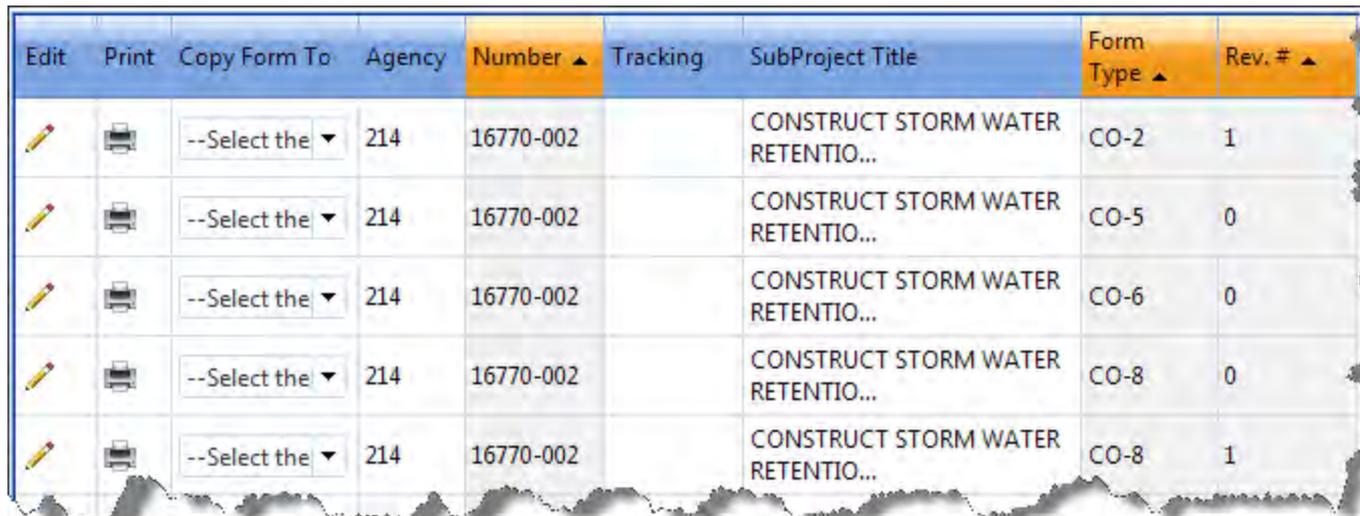


Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type
		--Select the ▾	214	15561-001		COYNER/HINER ELEVATOR	CO-2
		--Select the ▾	214	15502-000		NEW CONST: DINING HALL	CO-2
		--Select the ▾	214	14689-002		NEW SCHOOL OF EDUCATION	CO-2
		--Select the ▾	214	15501-000		IMP: CONVERSION 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 that 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 column headers are selected that determine which is the primary sort, which is the secondary sort, and which is the tertiary sort.

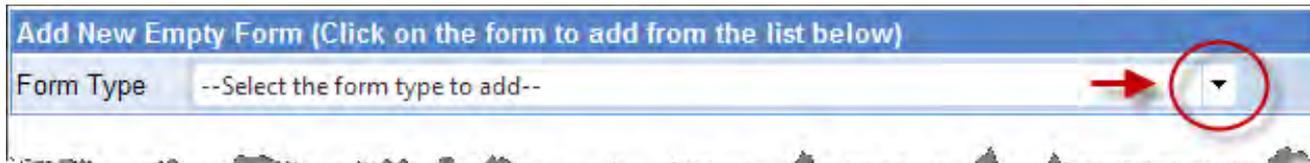
Adding a New Form



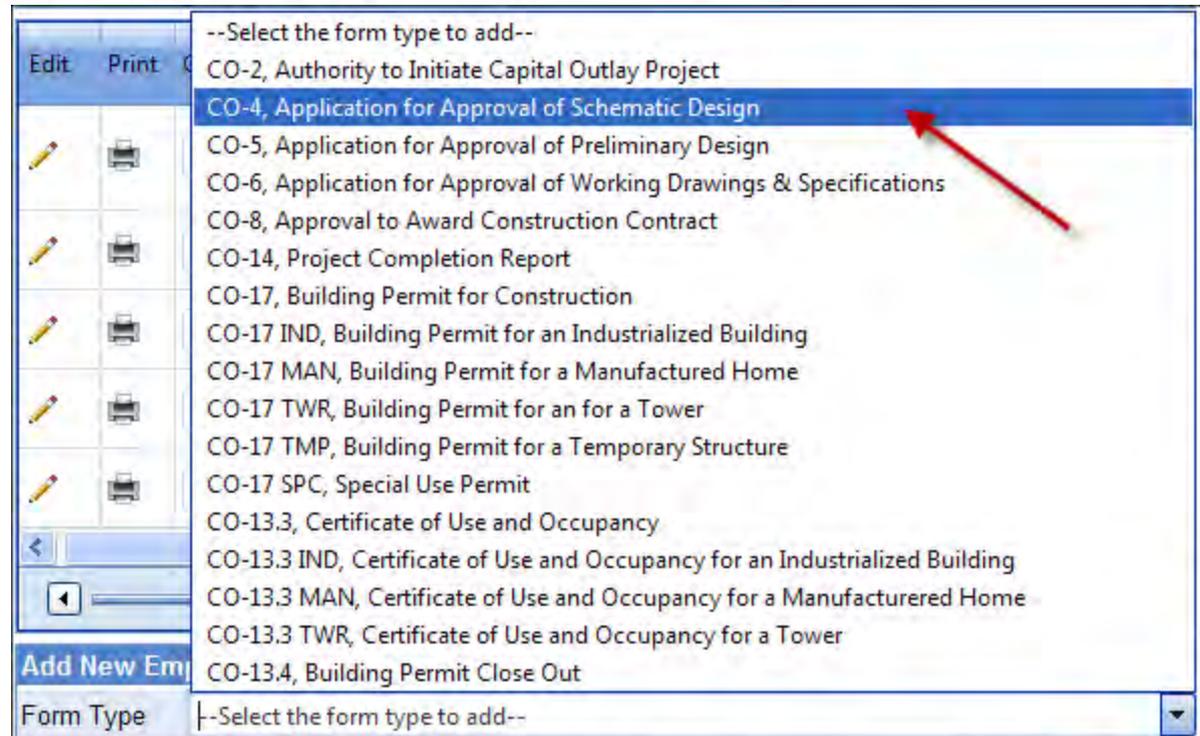
- **There are two ways to create a new form in BITS**
 - Copy an existing form to create a new form
 - Use a new blank form
- **The “copy to” method** is highly recommended if another form for the same project already exists in BITS. Using this method can save the user data entry time and help assure 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. However, we recommend you do not copy a CO Form to create a BO Form and vice versa.
 - 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 user must enter all data from scratch
 - Recommended for creating the first CO-2 or the first CO-17 for a project

Adding a New Empty Form

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



- Then select from the list of available form types:



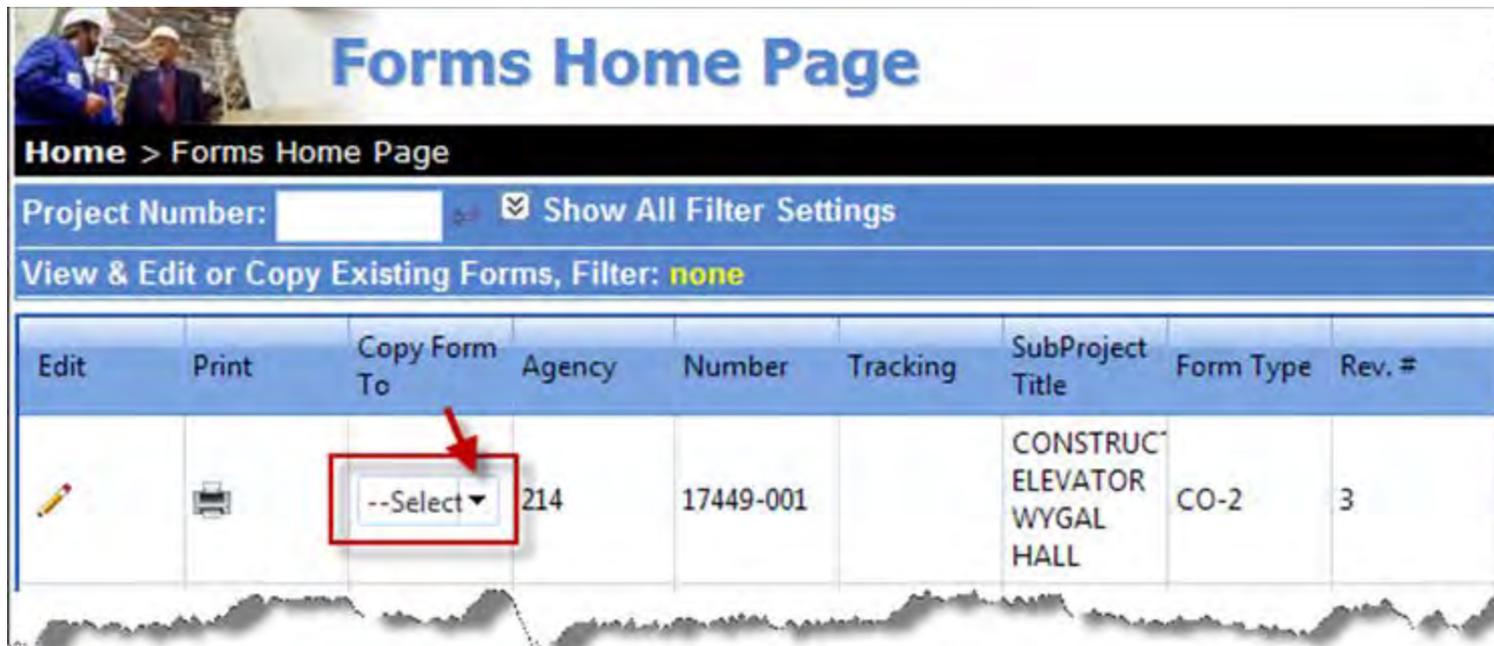
Adding a New Empty Form

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

The screenshot shows a web application interface for creating a new form. The title is "CO-4, Application for Approval of Schematic Design". The breadcrumb trail is "Home > Forms Home Page > BCOM Form". The interface includes a navigation menu on the left with options like "Agency", "Project", "NEW FORM", "Form Name", "Revision", "Form Status", "Links", "Click Here", and "Form Actions". The "Form Actions" section contains a "Save" button (floppy disk icon) and a "Delete" button (red X icon). The main form area is titled "Project Data" and contains several fields: "Project Number" (with a "New / Not Found" error), "Project Name" (with a "(Project Number)" error), "Sub-Project Number" (with a "New / Not Found" error), "Sub-Project Name" (with a "(Sub-Project Number)" error), "Agency" (dropdown), "Facility/Campus" (dropdown), "Project Type" (dropdown), "Location (FIPS Code)" (dropdown), and "Alternate Authority" (checkboxes for HECO, Level II, Level III, Independant or Non-State Entity, N/A, Design-Bid-Build, Construction Management, Design-Build, To Be Determined, PPEA, ESCO). The "Form Status" is currently set to "DRAFT".

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:



Forms Home Page

Home > Forms Home Page

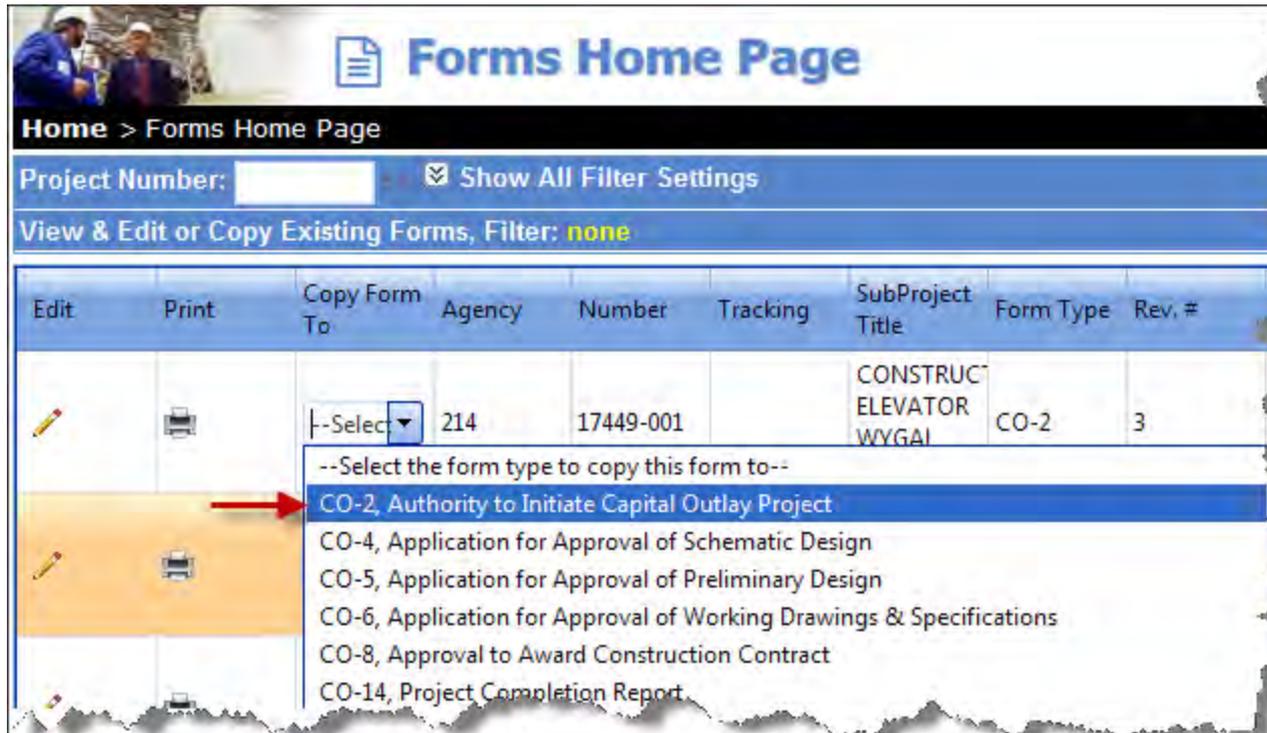
Project Number: Show All Filter Settings

View & Edit or Copy Existing Forms, Filter: none

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type	Rev. #
		--Select ▾	214	17449-001		CONSTRUC ELEVATOR WYGAL HALL	CO-2	3

Copying from an Existing Form to create a New Form (cont'd)

- From the resulting pick list, choose the type of new form you wish to create
- Forms need not be of the same type, but again don't use CO forms to create BO forms and vice versa
- Existing data from 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



The screenshot displays the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page'. Below this is a search bar for 'Project Number' and a link to 'Show All Filter Settings'. The main content area shows a table of existing forms with columns for 'Edit', 'Print', 'Copy Form To', 'Agency', 'Number', 'Tracking', 'SubProject Title', 'Form Type', and 'Rev. #'. A dropdown menu is open under the 'Copy Form To' column for the first row, listing various form types. A red arrow points to the selected option, 'CO-2, Authority to Initiate Capital Outlay Project'.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type	Rev. #
		--Select	214	17449-001		CONSTRUCT ELEVATOR WYGAJ	CO-2	3

--Select the form type to copy this form to--

- CO-2, Authority to Initiate Capital Outlay Project
- 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-8, Approval to Award Construction Contract
- CO-14, Project Completion Report

Forms

- The BITS “Form Home Page” and the BITS “My Forms” page (discussed later) are just a means to locate a specific form in BITS for the user wishes to view, edit, submit or print
- The next several slides discuss the forms, proper
- Users who need assistance are advised to submit help requests as follows:
 - For assistance with **CO forms**, contact: coforms@dgs.virginia.gov
 - For assistance with **BO forms**, contact: boforms@dgs.virginia.gov
 - For **technical issues** or **new user setup**, contact: bits@dgs.virginia.gov

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

CO-2, Authority to

Home > Forms Home Page > BCOM Form

Agency	Project/Form	Funds	Budget
501	Submit Date: -		
Project	Project Data		
NEW FORM	Project	Number	Name
Form Name	Sub-Project	Number	Name
CO-2	Agency	501 - Va	
Revision	Facility/Campus	--Select	
-	Project Type	REPAI	
Form Status	Location (FIPS Code)	Unknow	SFMO:
DRAFT	Alternate Authority	<input type="checkbox"/> HEC	<input type="checkbox"/> Inc
Links			
Click Here			
Form Actions			
			
Save			
			
Delete			

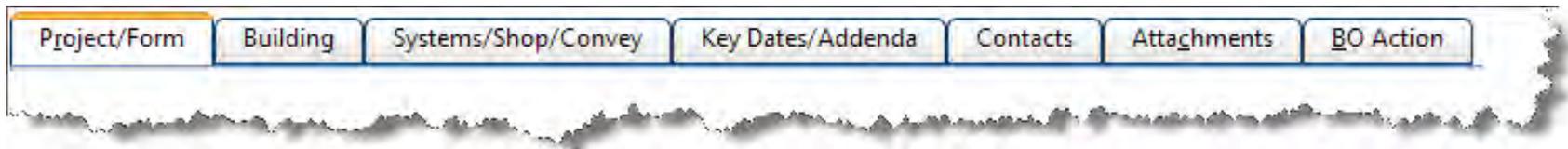
Form “Revision” numbers are not assigned until a form has been fully approved.

Understanding the Forms Page – The Tab Bar

- The top of every BITS form has a set of tabs, on which the user clicks, to access the various sections of the form
- Tabs are used to group related form data into sections, rather than requiring users to scroll down lengthy webpages to input or view form data. (Printed forms, however, retain the familiar formatting.)
- On “CO” forms, the tabs (form sections) are grouped as follows:



- On “BO” forms, the tabs (form sections) are grouped as follows:



“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

The screenshot shows a form titled "Project Data" with the following fields and values:

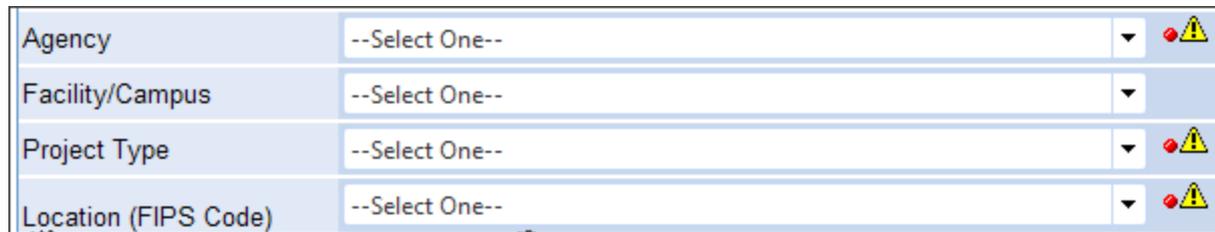
Field	Value	Required (Red Dot)
Project Number	13853	Yes
Project Name	SHOP ADDITONS & RENOVATIONS	Yes
Sub-Project Number	000	Yes
Sub-Project Name	SHOP ADDITONS & RENOVATIONS	Yes
Agency	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION	Yes
Facility/Campus	--Select One--	No
Project Type	MISCELLANEOUS	Yes
Location (FIPS Code)	Unknown Location [000] SFMO: VARIOUS LOCATIONS	Yes

IMPORTANT:

Fields with a red dot (●) adjacent to them are “required fields”. The form may be SAVED with these fields blank, but it cannot be SUBMITTED until these fields are completed. Refer to next slide for more information on required fields.

More About Required Fields

- If an agency user tries to submit a form containing blank data in any “required fields”, errors will be generated. The fields which must be corrected will be flagged with the yellow warning icons shown below.



Agency	--Select One--	▼	⚠
Facility/Campus	--Select One--	▼	
Project Type	--Select One--	▼	⚠
Location (FIPS Code)	--Select One--	▼	⚠

- 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.

The following validation errors must be corrected before this form can be saved.

- Project Number is required (Located on the Project Tab)
- Project Name is required (Located on the Project Tab)
- Sub-Project Number is required (Located on the Project Tab)
- Sub-Project Name is required (Located on the Project Tab)
- Agency is required (Located on the Project Tab)
- Project Type is required (Located on the Project Tab)
- FIPS Code is required (Located on the Project Tab)

“CO” Form Tabs

■ Funds tab

- This tab identifies funding information from the Appropriation Acts and other sources. It also identifies funds committed (under contract) or designated but uncommitted (not under contract) to other phases of the project.

Project Funds (List both available and proposed funds)											
Appropriation Act	Add										
	Edit	Item Number	Chapter No	Chapter Date	Fund	Fund Code	Remarks	Amount	Delete	Editor	
		C-35.25	806	2013	TRANSPORTATION	0472		\$9,250,000	X	amandaw	
	Totals							\$9,250,000			
Other Sources	Add										
	Edit	Source				Amount	Delete	Editor			
		Transfer to P.C. 501-15663				(\$880,000)	X	amandaw			
		Transfer to P.C. 501-16127				(\$350,000)	X	amandaw			
Totals					(\$1,230,000)						
Totals	Name					Amount					
	Funds Available / Proposed (All Sub-Projects)					\$8,020,000					
	Less Funds Committed to Other Phases (Enter details below)					\$0					
	Total Funds Available / Proposed					\$8,020,000					
Commitments to Other Phases											
Commitments to Other Phases	Add										
	Edit	Project	Title	Committed (Under Contract)	Uncommitted (Not Under Contract)	Delete	Revised By				
		18041-001	Fremont AHQ New Facilities	\$0	\$2,038,805	X					
		18041-002	Baywood AHQ Combo Building	\$0	\$201,000	X					
		18041-003	Tazewell/Claypool Equipment Shop	\$0	\$1,209,000	X					
		18041-004	Palmyra AHQ Office Building	\$0	\$898,000	X					
		18041-	Bealeton AHQ Chemical Storage	\$0	\$484,000	X					

“CO” Form Tabs (cont’d)

■ Funds tab (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)

Appropriation Act

Edit	Item Number	Chapter No	Chapter Date	Fund
	C-69	N/A	92-94	GENERAL
	N/A	N/A	97	OTHER
	N/A	N/A	98	OTHER

Total

- 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 (cont’d)

■ 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	C	\$0	(Itemized on Budget Detail Tab)
Building & Built-in Equipment	D	\$8,020,000	100.00 %
Sitework & Utility Construction	D	\$0	0.00 %
Construction Cost	C	\$8,020,000	
Design & Related Services	C	\$0	0.00 % (Itemized on Budget Detail Tab)
Inspection & Testing Services	C	\$0	0.00 % (Itemized on Budget Detail Tab)
Project Management & Other Costs	C	\$0	0.00 % (Itemized on Budget Detail Tab)
Furnishings & Movable Equipment	D	\$0	0.00 %
Construction Contingency	D	\$0	0.00 %
Project Cost	C	\$8,020,000	

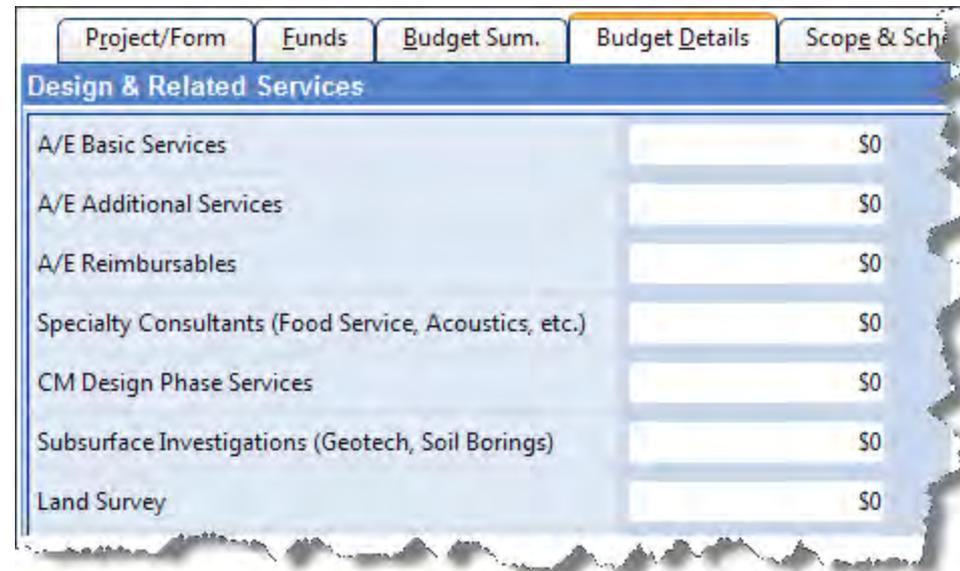
“CO” Form Tabs (cont’d)

■ Budget Details tab

- This tab is for itemizing the following cost categories:

- Design & Related Services
- Inspection & Testing Services
- Project Mgmt & Other Costs
- Acquisition Cost

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



The screenshot shows a software interface with five tabs: 'Project/Form', 'Funds', 'Budget Sum.', 'Budget Details', and 'Scope & Sch'. The 'Budget Details' tab is active and displays a table titled 'Design & Related Services'. The table lists seven categories, each with a corresponding value of '\$0'.

Design & Related Services	
A/E Basic Services	\$0
A/E Additional Services	\$0
A/E Reimbursables	\$0
Specialty Consultants (Food Service, Acoustics, etc.)	\$0
CM Design Phase Services	\$0
Subsurface Investigations (Geotech, Soil Borings)	\$0
Land Survey	\$0

“CO” Form Tabs (cont’d)

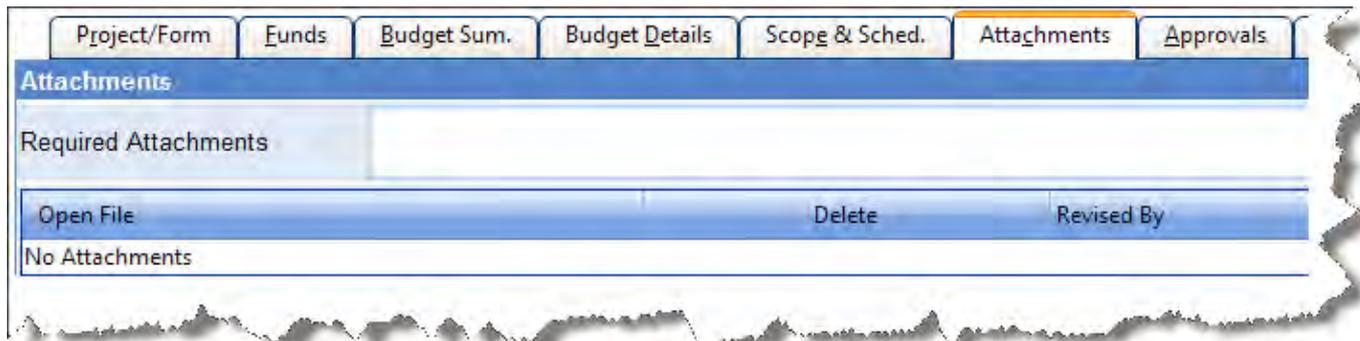
- Scope & Schedule tab
 - This tab provides:
 - New Construction scope (SF)
 - Renovated scope (SF)
 - Key Quantity:
 - Use to enter a key qty, other than SF for project
 - e.g., for Dorms – enter # of beds; for a Chiller Replacement – enter # of tons of cooling; etc.
 - Names of the A/E firm and Contractor,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

Project/Form	Funds	Budget Sum.	Budget Details	Scope & Sched.
Project Scope				
New Construction		3,260	gross sq. ft.	
Renovation		1,500	gross sq. ft.	
Total Scope		4,760	gross sq. ft.	
Key Quantity		1	LOT	
Design Consultant & Contractor				
Architect / Engineer				
Construction Contractor				
Project Schedule				
Award A/E Contract		10/21/2005		
Received Construction Bids		11/27/2007		
Substantial Completion		11/14/2008		
Received Construction Bids		11/27/2007		
Substantial Completion		11/14/2008		

“CO” Form Tabs (cont’d)

■ 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



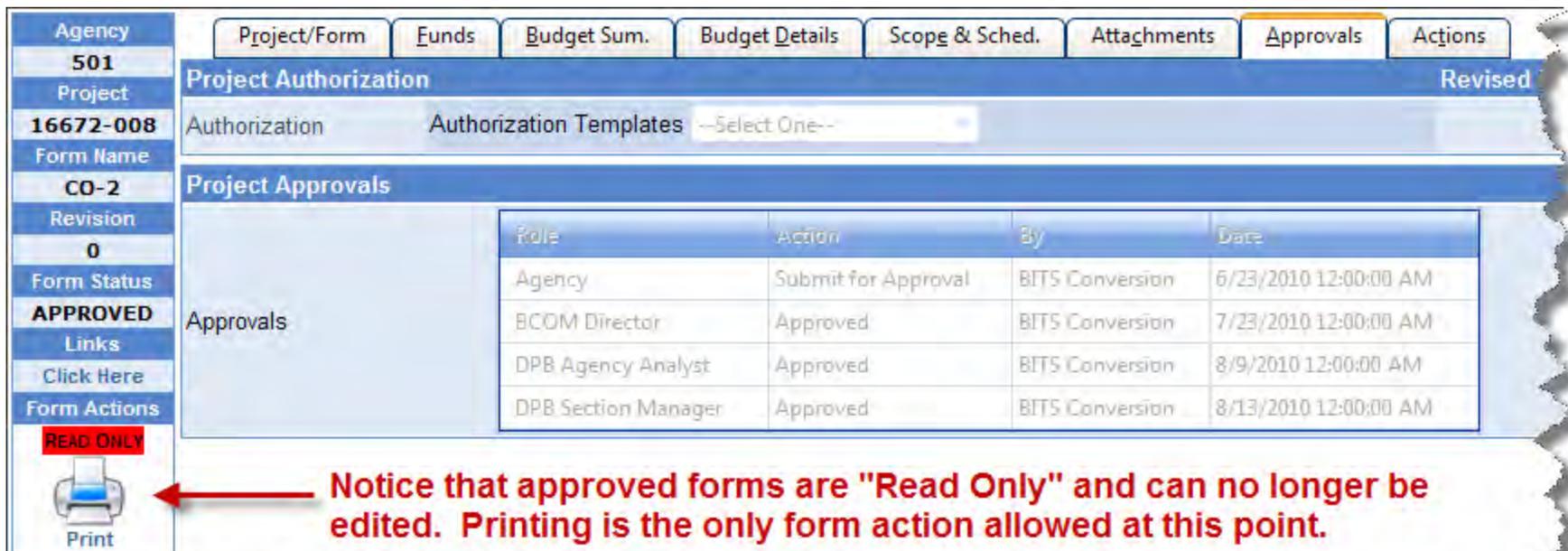
The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Project/Form, Funds, Budget Sum., Budget Details, Scope & Sched., Attachments (highlighted), and Approvals. Below the tabs is a section titled "Attachments" with a blue header. Underneath, there is a "Required Attachments" section with a large empty text area. Below that is a table with three columns: "Open File", "Delete", and "Revised By". The table currently contains one row with the text "No Attachments".

Open File	Delete	Revised By
No Attachments		

"CO" Form Tabs (cont'd)

■ 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



The screenshot displays a web application interface for a CO form. The sidebar on the left contains the following information:

- Agency: 501
- Project: 16672-008
- Form Name: CO-2
- Revision: 0
- Form Status: APPROVED
- Links: Click Here
- Form Actions: READ ONLY (with a Print icon)

The main content area shows the 'Approvals' tab selected. It includes a 'Project Authorization' section with a dropdown menu for 'Authorization Templates' set to '--Select One--'. Below this is a 'Project Approvals' section with a table of approvals:

Role	Action	By	Date
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

A red arrow points from the 'Print' icon in the sidebar to the text below:

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 (cont’d)

- A note regarding “converted” CO form data:
 - The previous (pre-February 2012) 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 February 2012.
 - 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 current 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.

“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

The screenshot shows a web form interface with a sidebar on the left and a main form area. The sidebar contains the following elements:

- Home > Forms Home Page > BCOM Form
- Agency: 501
- Project: 16130-005
- Form Name: CO-13.3
- Form Status: APPROVED
- Links: Click Here
- Form Actions: READ ONLY (with a printer icon and 'Print' button)

The main form area contains the following fields:

- Agency Tracking Number: [input field]
- Project Comments: [input field]
- Form Data section:
 - Street Address: [input field] with a red dot
 - Zip Code: [input field] with a red dot
 - City: [input field] with a red dot
 - State: [input field] with a red dot
 - Building Name: NEW CRAFTONS GATE AHQ COMBINATION BUILDING (with a red dot)
 - Comments: [input field]

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 (cont’d)

■ Building tab

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

The screenshot displays the 'Building - Code/Standards Data' section of the 'CO-13.3, Certificate of Use and Occupancy' form. The form is titled 'Home > Forms Home Page > BCOM Form' and includes a navigation bar with tabs for 'Project/Form', 'Building', 'Systems/Convey', 'Key Dates', 'Contacts', 'Attachments', and 'GO Action'. The 'Building' tab is selected.

The form fields include:

- Agency: 215
- Project: 17671-000
- Form Name: CO-13.3
- Form Status: APPROVED
- Links: Click Here
- Form Actions: READ ONLY, Print

The 'Building - Code/Standards Data' section contains the following information:

- Building Code Edition(s): VUSBC 2009 Edition
- Building Code Parts: Virginia Construction Code - Part 1
- Accessibility Standards: 2010 ADA Standards for Accessible Design
- High Performance Bldg. Act: LEED
- Purpose/Occupancy: Technology Center with data center, IT dept offices, classrooms, mee
- Occupant Load: N/A, 1,881
- Occupancy Remarks: None
- Group(s):

Edit	Mixed Use	Building Groups	Del
	SEPARATED	A-1	
	SEPARATED	B	
	NON-SEPARATED	A-3	
	NON-SEPARATED	B	
- Type of Construction: IIA
- Building Height: N/A, 74.0 (feet)
- Number of St: N/A

“BO” Form Tabs (cont’d)

■ Systems/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

The screenshot displays a web-based form interface with the following components:

- Navigation Tabs:** Agency, Project/Form, Building, **Systems/Convey** (selected), Key Dates, Contacts.
- Form Fields:**
 - Agency: 501
 - Project: 16130-005
 - Form Name: CO-13.3
 - Form Status: APPROVED
 - Links: Click Here
 - Form Actions: READ ONLY, Print (with printer icon)
- Fire Protection Systems:**
 - Fire Suppression: NFPA 13, NFPA 13B, Chemical, Clean Agent, Provided - Not Required, None
 - Fire Detection & Alarm Systems: Required, Provided - Not Required, None
 - Sprinkler Head Database Updated: Yes, No, Date: _____
- Security Systems:**
 - Security System: None, Delayed Egress, Access Control, N/A
- Conveyors:**
 - New Elevators: Yes, No, Quantity: _____
 - Existing Elevators: Yes, No, Quantity: _____
 - New Other Conveyors: Yes, No, Quantity: _____
 - Existing Other Conveyors: Yes, No, Quantity: _____

“BO” Form Tabs (cont’d)

■ Key Dates tab

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

CO-13.3, Certificate of Use and Occupancy

Home > Forms Home Page > BCOM Form

Agency	Project/Form	Building	Systems/Convey	Key Dates	Contacts	Attache
215	Key Dates					
Project						
17671-000	Architect/Engineer's Certificate	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
Form Name						
CO-13.3	Contractor's Certificate	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
Form Status						
APPROVED	Fire Marshal's Inspection Report	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
Links						
Click Here	Checklist for Occupancy	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
Form Actions						
READ ONLY	Structural & Special Inspections Report	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
	Elevator Inspection Report	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
Print	Potable Water Report	<input type="checkbox"/>	N/A	08/11/2014	<input type="text"/>	<input type="text"/>
	Smoke Control Special Inspection Report	<input checked="" type="checkbox"/>	N/A		<input type="text"/>	<input type="text"/>

“BO” Form Tabs (cont’d)

- 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

CO-17, Building Permit for Construction

Home > Forms Home Page > BCOM Form

Agency | Project/Form | Building | Systems/Shop/Convey | Key Dates/Addenda | **Contacts**

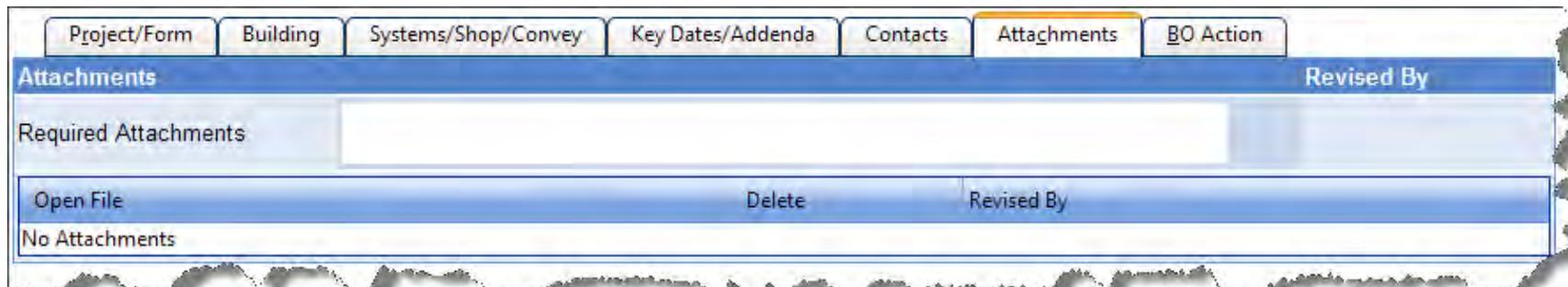
Agency	501
Project	00501-002
Form Name	CO-17
Form Status	APPROVED
Links	Click Here
Form Actions	READ ONLY
	Print

Agency	
Contact Name	--
Phone Number(s)	--
Email	--
Architect/Engineer	
Firm Name	--
License Number	--
Contact Name	
Phone Number(s)	
Email	
Contractor	
Firm Name	--
License Number	--
Phone Number(s)	

“BO” Form Tabs (cont’d)

■ Attachments tab

- Supplemental documents may 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



The screenshot shows a software interface with a navigation bar at the top containing tabs: Project/Form, Building, Systems/Shop/Convey, Key Dates/Addenda, Contacts, Attachments (highlighted), and BO Action. Below the navigation bar is a section titled "Attachments" with a "Revised By" field on the right. The main area contains a "Required Attachments" section with a large empty text box. Below this is a row of buttons: "Open File", "Delete", and "Revised By". At the bottom, a status bar displays "No Attachments".

“BO” Form Tabs (cont’d)

- 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, close out requirements, and approvals are located

CO-17, Building Permit for Construction

Home > Forms Home Page > BCOM Form

Agency: 216
Project: 17675-001
Form Name: CO-17
Form Status: APPROVED

Project Authorization

Effective Date: 01/13/2015

Certification Type: *Temporary Final

Expiration Date: 02/27/2015
(Expiration date is only applicable to permits and temporary certificates.)

Revision Date:

Revision Title:

Building Official Action: Action Templates --Select One--

SFMO Inspection Required?
 Yes No

Form Close Out Dispensation

Close Out Dispensation:

Project Approvals

Role	Action	By	Date
Agency	Submitted to BCOM	Winfield Hunt	1/12/2015 5:19:46 PM
BCOM Director	Approved	Mike Coppa	1/14/2015 2:34:18 PM

Agency Form Actions

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



The image shows a vertical menu of form actions. The menu items are: Agency 501, Project 13300-009, Form Name CO-6, Revision -, Form Status DRAFT, Links Click Here, and Form Actions. The Form Actions section is highlighted with a red box and contains three icons: a floppy disk for Save, a red X for Delete, and a printer for Print. A red arrow points to the Form Actions section.

- **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

Saving and Submitting Forms – Agency User

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

13300-009

Form Name: Submit Date: -

CO-6

Revision: Project

-

Form Status: Project

DRAFT

Links: Sub-Pro

Click Here: Agency

Form Actions: Facility/

 Save

 Delete

 Print

Location: Project

Alternate Authority: HECO Level II Select 1 drop do

Independant or Non-State Entity N/A

... ...

Save Form

Actions:

Save data only. Do not submit form.

Save data and submit for agency approval.

Email Remarks:

Tom, I am submitting this form for your review and approval and for you to submit to it to BCOM. Check the square footage on the Scope tab to verify it is correct.

Saving and Submitting Forms – Agency User (cont'd)

- “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 – Agency User (cont'd)

- 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

From: BITS System [BITS_NoRely@dgs.virginia.gov]
To: I
Cc:
Subject: Form Processing Notification: 501-16369-000, CO2

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 Creator 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 – Agency User (cont'd)

Form Saved

The CO2 form for project, 16130-000, has been saved.

Click on one of the following to continue:



Print the Form

[Return to the CO2 Form](#)

[Go to the Forms Home Page](#)

[Go to the My Forms Page](#)

[Go to the System Home Page](#)

[Done using the system for now, Logout](#)

Saving and Submitting Forms – Agency Approver (cont'd)

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

13300-009

Form Name Submit Date: -

CO-6

Revision

-

Form Status

DRAFT

Links

Click Here

Form Actions

 Save

 Delete

 Print

Project

Project

Sub-Pro

Agency

Facility/

Project

Location

Alternate

Independent or Non-State Entity I/A

State Aid Field Construction Management

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:

Tom, I am submitting this form for your review and approval and for you to submit to it to BCOM. Check the square footage on the Scope tab to verify it is correct.

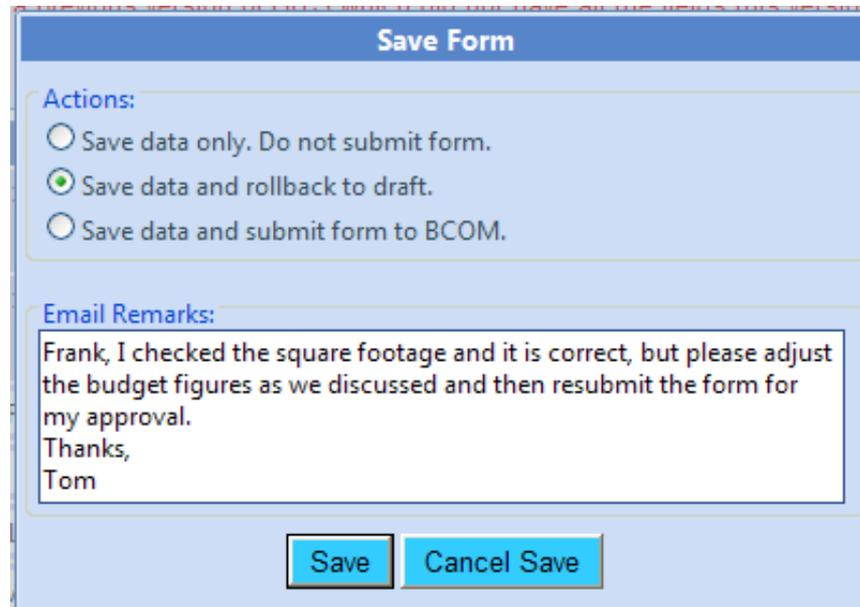
Save Cancel Save

Saving and Submitting Forms – Agency Approver (cont'd)

- “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 – Agency Approver

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



The screenshot shows a dialog box titled "Save Form". It contains two main sections: "Actions:" and "Email Remarks:". The "Actions:" section has three radio buttons: "Save data only. Do not submit form.", "Save data and rollback to draft." (which is selected), and "Save data and submit form to BCOM.". The "Email Remarks:" section contains a text area with the following text: "Frank, I checked the square footage and it is correct, but please adjust the budget figures as we discussed and then resubmit the form for my approval. Thanks, Tom". At the bottom of the dialog box are two buttons: "Save" and "Cancel Save".

- 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 – Agency Approver (cont'd)

- “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

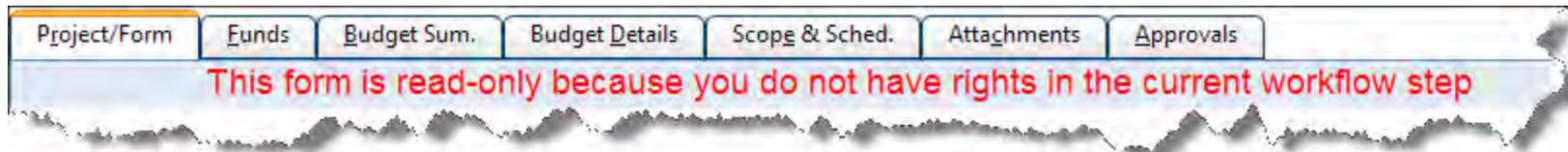
Actions:

- 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 discussed in the 12/21 telecon. Would appreciate expedited approval of this CO-6.
Thanks,
Tom Jones

Save **Cancel Save**



Saving and Submitting Forms – Agency Approver (cont'd)

- Once a form has been “submitted” by the agency approver to BCOM:
 - the form creator, the agency approver(s), and the BCOM Lead Reviewer 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 – Agency Approver (cont'd)

Form Saved

The CO2 form for project, 16130-000, has been saved.

Click on one of the following to continue:



Print the Form

Return to the CO2 Form

Go to the Forms Home Page

Go to the My Forms 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

CO-2, Authority to Initiate Capital Outlay Project

Home > Forms Home Page > BCOM Form

Agency: 501
Project: 16675-000
Form Name: CO-2
Revision: 0
Form Status: **APPROVED**
Links: Click Here
Form Actions: **READ ONLY**, Print

This form is is read-only because the status is: APPROVED
This form has been converted from a previous version of BITS which did not have all the fields this version does. Some data.

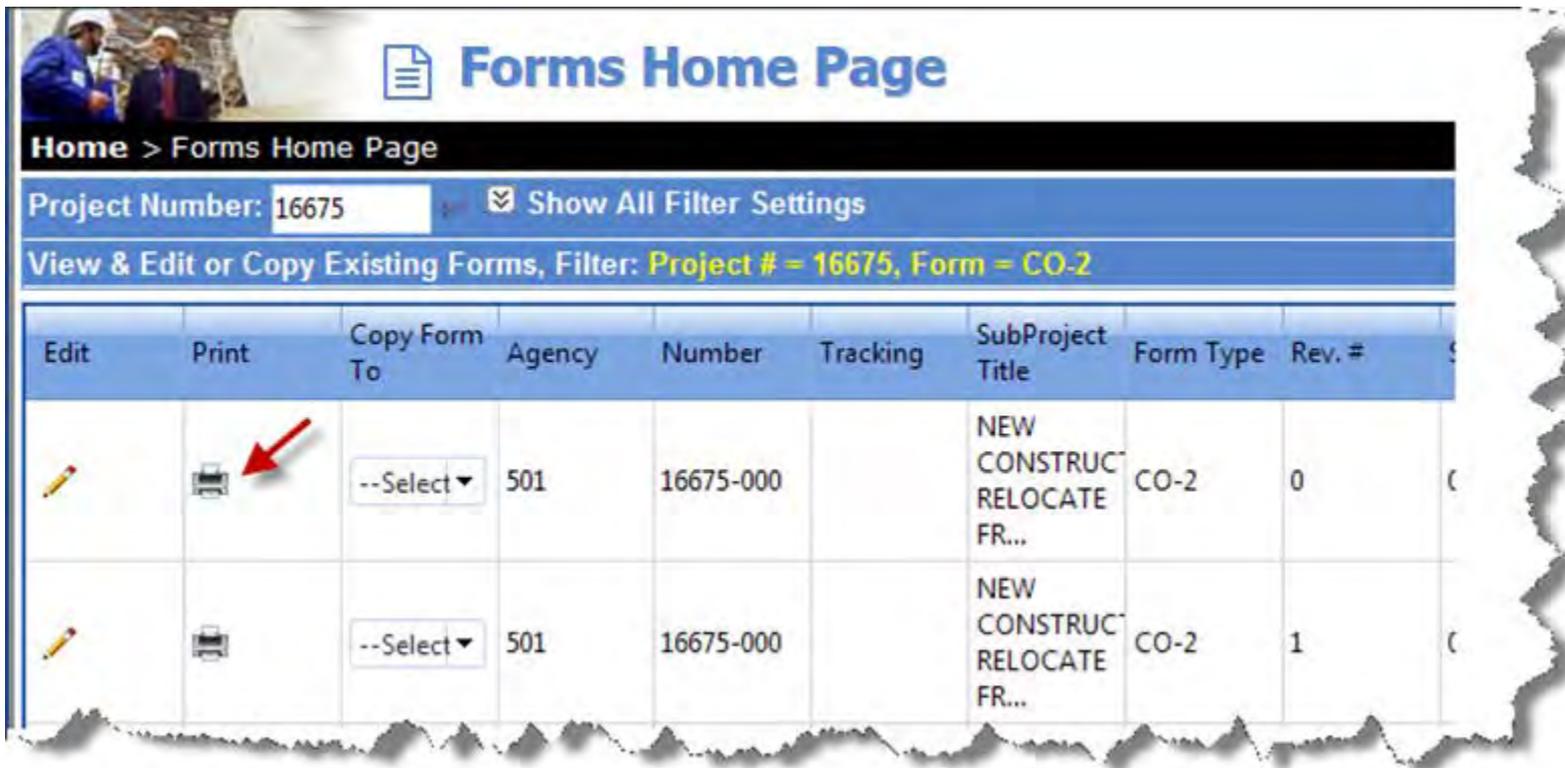
Submit Date: 6/18/2002

Project Data

Project Number:	16675	Found
Project Name:	NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY	(Project ID)
Sub-Project Number:	000	Found
Sub-Project Name:	NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY	(Sub-Project ID)
Agency:	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION	
Facility/Campus:	--Select One--	
Project Type:	VDOT - OFFICE/SHOP/STORAGE	
Location (FIPS Code):	SOUTHAMPTON CO. [175]	
	SFMO: TIDEWATER REGIONAL OFFICE	

Printing Forms (cont'd)

- 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
- Rather than going directly to a printer, form will first appear in a “Print Preview” screen

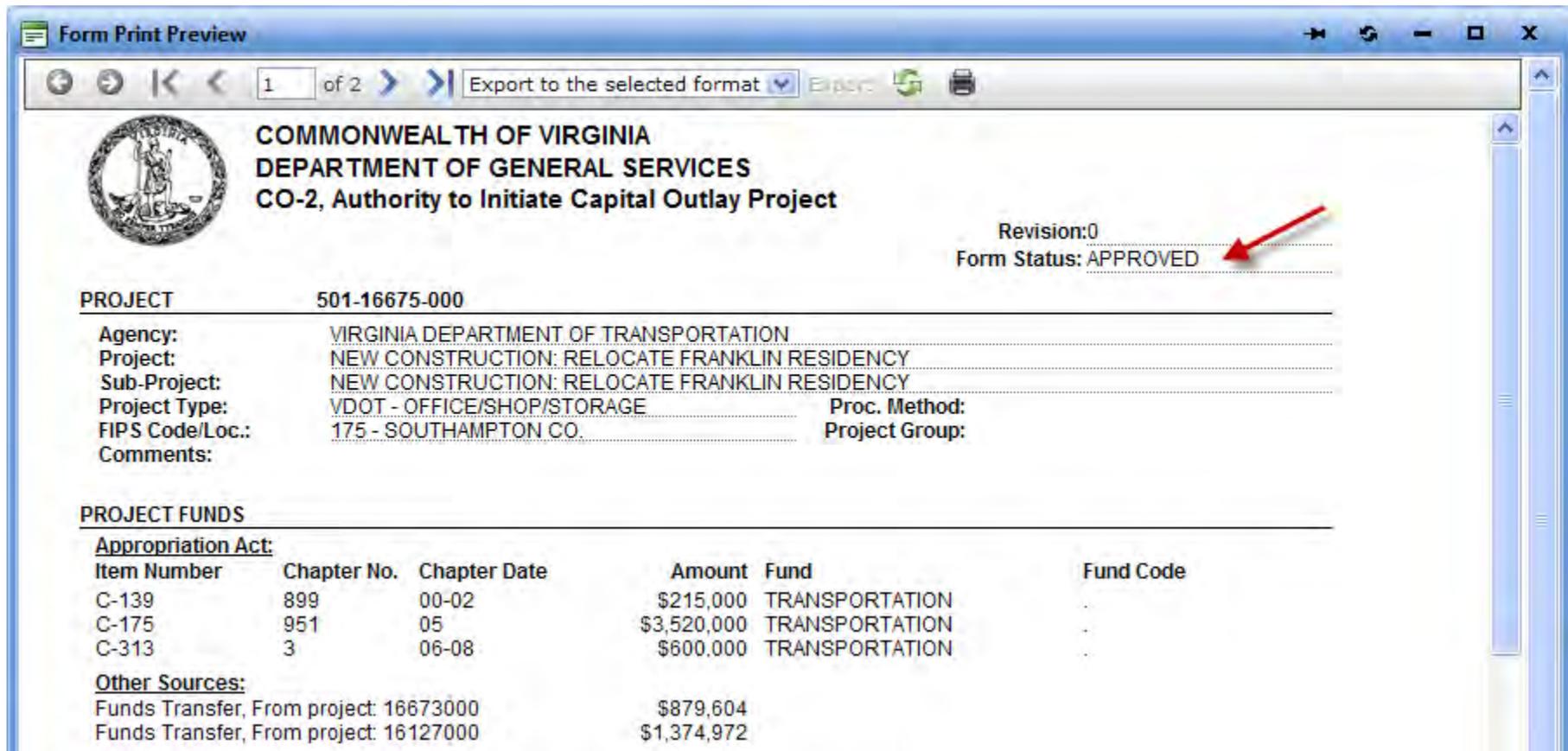


The screenshot shows the 'Forms Home Page' interface. At the top, there is a navigation bar with 'Home > Forms Home Page'. Below this, there is a search bar with 'Project Number: 16675' and a 'Show All Filter Settings' button. A filter summary bar indicates 'View & Edit or Copy Existing Forms, Filter: Project # = 16675, Form = CO-2'. The main content is a table with columns: Edit, Print, Copy Form To, Agency, Number, Tracking, SubProject Title, Form Type, and Rev. #. Two rows of form data are visible. A red arrow points to the printer icon in the 'Print' column of the first row.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title	Form Type	Rev. #
		--Select ▾	501	16675-000		NEW CONSTRUCT RELOCATE FR...	CO-2	0
		--Select ▾	501	16675-000		NEW CONSTRUCT RELOCATE FR...	CO-2	1

Printing Forms (cont'd)

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



Form Print Preview

1 of 2 | Export to the selected format | Export | Print

 **COMMONWEALTH OF VIRGINIA**
DEPARTMENT OF GENERAL SERVICES
CO-2, Authority to Initiate Capital Outlay Project

Revision:0
Form Status: APPROVED 

PROJECT 501-16675-000

Agency: VIRGINIA DEPARTMENT OF TRANSPORTATION
Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Sub-Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Project Type: VDOT - OFFICE/SHOP/STORAGE Proc. Method:
FIPS Code/Loc.: 175 - SOUTHAMPTON CO. Project Group:
Comments:

PROJECT FUNDS

Appropriation Act:

Item Number	Chapter No.	Chapter Date	Amount	Fund	Fund Code
C-139	899	00-02	\$215,000	TRANSPORTATION	-
C-175	951	05	\$3,520,000	TRANSPORTATION	-
C-313	3	06-08	\$600,000	TRANSPORTATION	-

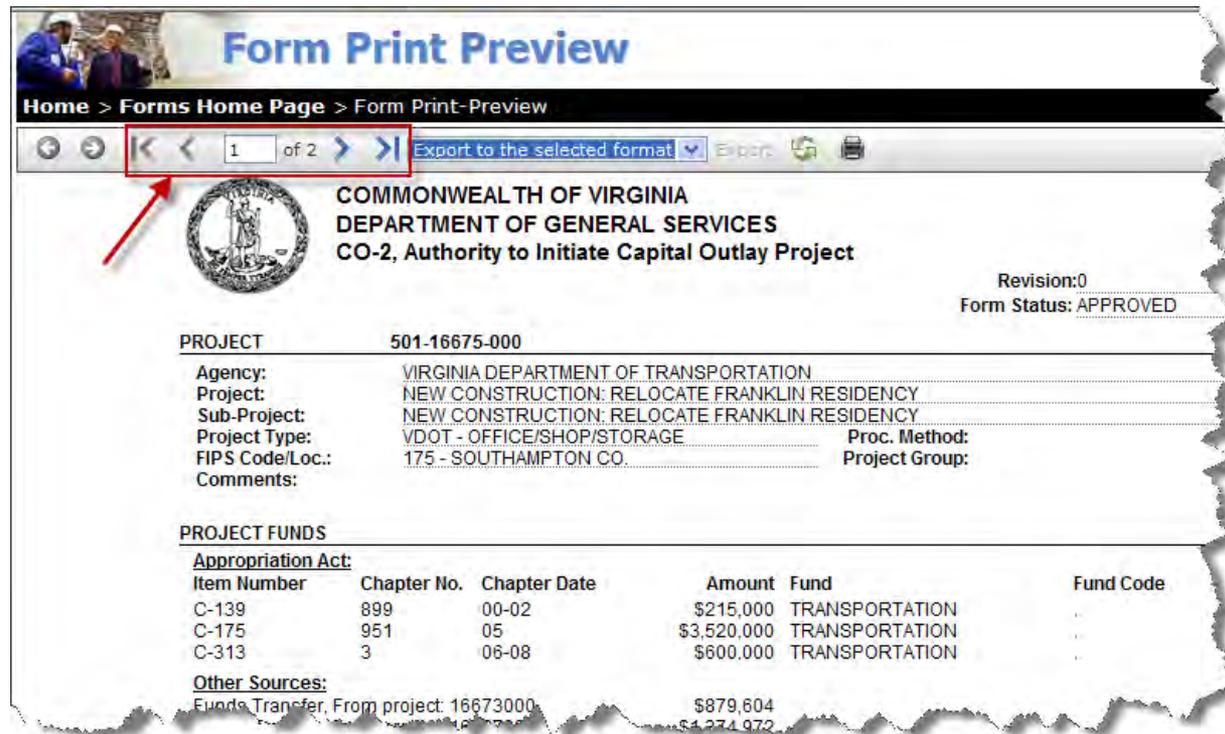
Other Sources:

Funds Transfer, From project: 16673000	\$879,604
Funds Transfer, From project: 16127000	\$1,374,972

Printing Forms (cont'd)

- 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



Form Print Preview

Home > Forms Home Page > Form Print-Preview

1 of 2

COMMONWEALTH OF VIRGINIA
DEPARTMENT OF GENERAL SERVICES
CO-2, Authority to Initiate Capital Outlay Project

Revision:0
Form Status: APPROVED

PROJECT 501-16675-000

Agency: VIRGINIA DEPARTMENT OF TRANSPORTATION
Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Sub-Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Project Type: VDOT - OFFICE/SHOP/STORAGE Proc. Method:
FIPS Code/Loc.: 175 - SOUTHAMPTON CO. Project Group:
Comments:

PROJECT FUNDS

Appropriation Act:

Item Number	Chapter No.	Chapter Date	Amount	Fund	Fund Code
C-139	899	00-02	\$215,000	TRANSPORTATION	..
C-175	951	05	\$3,520,000	TRANSPORTATION	..
C-313	3	06-08	\$600,000	TRANSPORTATION	..

Other Sources:

Funds Transfer, From project: 16673000	\$879,604
	\$4,274,972

Printing Forms (cont'd)

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

Form Print Preview

Home > Forms Home Page > Form Print-Preview

1 of 2

Export

COMMISSIONER OF TRANSPORTATION
DEPARTMENT OF TRANSPORTATION
CO-2, SERVICES
Outlay Project

PROJECT 501-16675-000

Agency:	VIRGINIA DEPARTMENT OF TRANSPORTATION	
Project:	NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY	
Sub-Project:	NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY	
Project Type:	VDOT - OFFICE/SHOP/STORAGE	Proc. Method:
FIPS Code/Loc.:	175 - SOUTHAMPTON CO.	Project Group:
Comments:		

Printing Forms (cont'd)

- Clicking on the icon highlighted below will re-query the database to refresh the results. (This “refresh” is very rarely needed.)

Form Print Preview

Home > Forms Home Page > Form Print-Preview

1 of 2 | Export to the selected format | Export |  | 

 **COMMONWEALTH OF VIRGINIA**
DEPARTMENT OF GENERAL SERVICES
CO-2, Authority to Initiate Capital Outlay Project

Revision:0
Form Status: APPROVED

PROJECT 501-16675-000

Agency: VIRGINIA DEPARTMENT OF TRANSPORTATION
Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Sub-Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Project Type: VDOT - OFFICE/SHOP/STORAGE Proc. Method:
FIPS Code/Loc.: 175 - SOUTHAMPTON CO. Project Group:
Comments:

PROJECT FUNDS

Appropriation Act:

Item Number	Chapter No.	Chapter Date	Amount	Fund	Fund Code
C-139	899	00-02	\$215,000	TRANSPORTATION	
C-175	951	05	\$3,520,000	TRANSPORTATION	
C-313	3	06-08	\$600,000	TRANSPORTATION	

Other Sources:
Funds Title: m-project:16673000 6979-694

Printing Forms (cont'd)

- 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 the form to pdf format and then print the pdf file to a desired printer

Form Print Preview

Home > Forms Home Page > Form Print-Preview

1 of 2 | Export to the selected format | Export | 

 **COMMONWEALTH OF VIRGINIA**
DEPARTMENT OF GENERAL SERVICES
CO-2, Authority to Initiate Capital Outlay Project

Revision:0
Form Status: APPROVED

PROJECT 501-16675-000

Agency: VIRGINIA DEPARTMENT OF TRANSPORTATION
Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Sub-Project: NEW CONSTRUCTION: RELOCATE FRANKLIN RESIDENCY
Project Type: VDOT - OFFICE/SHOP/STORAGE Proc. Method:
FIPS Code/Loc.: 175 - SOUTHAMPTON CO. Project Group:
Comments:

PROJECT FUNDS

Appropriation Act:

Item Number	Chapter No.	Chapter Date	Amount	Fund	Fund Code
C-139	899	00-02	\$215,000	TRANSPORTATION	
C-175	951	05	\$3,520,000	TRANSPORTATION	
C-313	3		\$000,000	TRANSPORTATION	

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

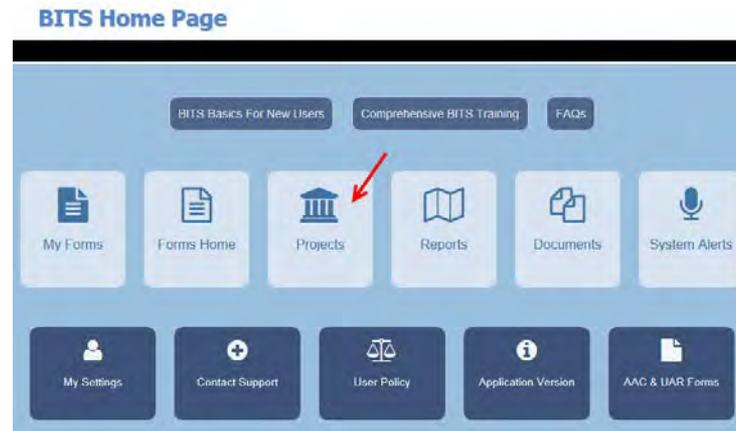
The “Project Home Page”

(How to View, Add & Edit Projects)

*Commonwealth of Virginia
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:
 - **Directly** by accessing the Project Master Record from the “Project Home Page”
(this method is discussed under this help topic)
 - **Indirectly** 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 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 (cont'd)

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

Home > Project Home

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

Edit	Agency	Number	Project Title	Subproject Title	Cap Proj	Facility/Campus	Alternate Authority	Procurement Method	Type	Projec Group	AgencyName
	194	A1194-017	2011 DGS NON-CAPITAL PROJECTS	GENERAL ASSEMBLY BUILDING - SPRINKLER HEAD WORK	<input type="checkbox"/>				FIRE PROTECTION		DEPARTMENT OF GENERAL SERVICE
	194	A1194-018	2011 DGS NON-CAPITAL PROJECTS	MADISON BUILDING - VDH STORAGE GATES	<input type="checkbox"/>	Capitol Square Complex			MISCELLANEOUS		DEPARTMENT OF GENERAL SERVICE
	194	A1194-019	2011 DGS NON-CAPITAL PROJECTS	JAMES MONROE BUILDING - 4TH FLOOR - WEST QUADRANT RENOVATION	<input type="checkbox"/>				RENOVATION, GENERAL		DEPARTMENT OF GENERAL SERVICE
	194	A1194-020	2011 DGS NON-CAPITAL PROJECTS	WASHINGTON MONUMENT LIGHTING - CAPITOL SQUARE	<input type="checkbox"/>				LIGHTING		DEPARTMENT OF GENERAL SERVICE
	194	A1194-021	2011 DGS NON-CAPITAL PROJECTS	WASHINGTON BUILDING - BFM RELOCATION - 10TH FLOOR	<input type="checkbox"/>				RENOVATION, GENERAL		DEPARTMENT OF GENERAL SERVICE
	194	A1194-022	2011 DGS NON-CAPITAL PROJECTS	MONROE BUILDING - MAINTENANCE & OPERATIONS - MEZZANINE	<input type="checkbox"/>				MISCELLANEOUS		DEPARTMENT OF GENERAL SERVICE
	194	A1194-023	2011 DGS NON-CAPITAL PROJECTS	MADISON BUILDING - BOILER REPLACEMENT	<input type="checkbox"/>				BOILER		DEPARTMENT OF GENERAL SERVICE

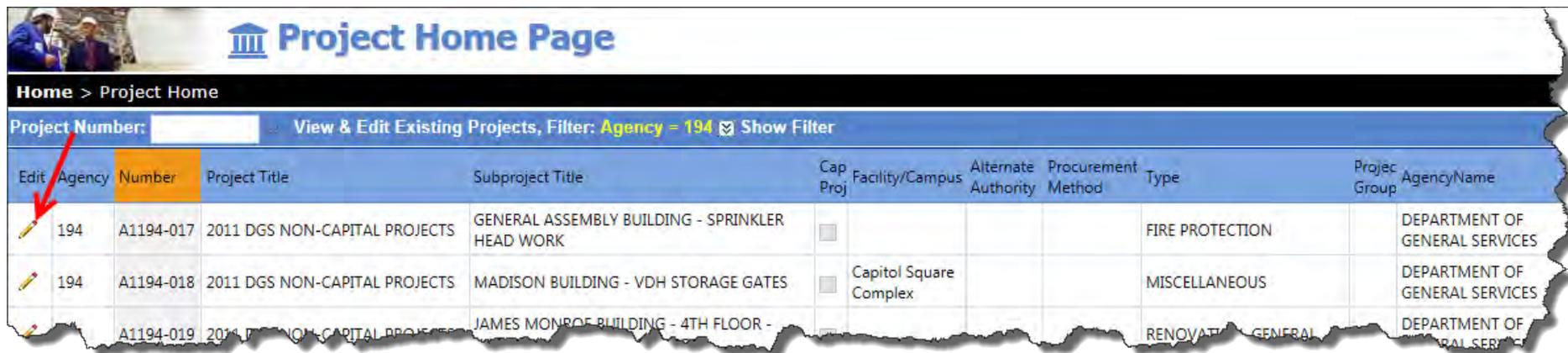
Page 20 of 25

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.

Viewing or Editing the Project Master Record

- 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



The screenshot shows the 'Project Home Page' interface. At the top, there is a navigation bar with 'Home > Project Home'. Below this is a search bar for 'Project Number:' and a filter section for 'View & Edit Existing Projects, Filter: Agency = 194' with a 'Show Filter' button. The main content is a table with columns: Edit, Agency, Number, Project Title, Subproject Title, Cap Proj, Facility/Campus, Alternate Authority, Procurement Method, Type, Projec Group, and AgencyName. A red arrow points to the pencil icon in the 'Edit' column of the first row.

Edit	Agency	Number	Project Title	Subproject Title	Cap Proj	Facility/Campus	Alternate Authority	Procurement Method	Type	Projec Group	AgencyName
	194	A1194-017	2011 DGS NON-CAPITAL PROJECTS	GENERAL ASSEMBLY BUILDING - SPRINKLER HEAD WORK	<input type="checkbox"/>				FIRE PROTECTION		DEPARTMENT OF GENERAL SERVICES
	194	A1194-018	2011 DGS NON-CAPITAL PROJECTS	MADISON BUILDING - VDH STORAGE GATES	<input type="checkbox"/>	Capitol Square Complex			MISCELLANEOUS		DEPARTMENT OF GENERAL SERVICES
		A1194-019	2011 DGS NON-CAPITAL PROJECTS	JAMES MONROE BUILDING - 4TH FLOOR -	<input type="checkbox"/>				RENOVATION - GENERAL		DEPARTMENT OF GENERAL SERVICES

Project Home Page (cont'd)

- 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
 - **Alternate Authority** (e.g., HECO, HECOM, Non-State, etc.)
 - **Procurement Method** (e.g., CM, DB, DBB, etc.)
 - **Project Type** (e.g., Dormitory, Museum, Office, etc.)
 - **Project Group** (e.g., Chapter 1, etc.)
 - **Agency Name**

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 by BCOM to note planned Bid Receipt Dates
 - **Project Comments**
 - Used to provide brief additional clarifying remarks about the project
 - **Project Completed**
 - Used to denote a project as complete (for BCOM record retention purposes)

Example Project Master Record

Agency	Project Data		Re
194	Capital Project	<input type="radio"/> Capital Project <input checked="" type="radio"/> Non-Capital Project	
Project			
A5194-004	Project	Number: A5194	
Mode		Name:	
Edit		2016 DGS NON-CAPITAL PROJECTS - TEST	
Links			
Click Here			
Actions	Sub-Project	Number: 004	
		Name:	
Save		WESTMORELAND BLDG - BOILER REPLACEMENT	
	Project Type	BOILER	▼
	Location (FIPS Code)	RICHMOND, CITY OF [760]	▼
		SFMO: CENTRAL REGIONAL OFFICE	
	Agency	194 - DEPARTMENT OF GENERAL SERVICES	▼
	Facility/Campus	Metro-Richmond Area	▼ Refresh
	Alternate Authority	<input type="checkbox"/> HECO <input type="checkbox"/> Level II <input type="checkbox"/> Level III	
		<input type="checkbox"/> Independent or Non-State Entity <input type="checkbox"/> N/A	
	Procurement Method	<input type="checkbox"/> Design-Bid-Build <input type="checkbox"/> Construction Management <input type="checkbox"/> Design-Build	
		<input type="checkbox"/> To Be Determined <input type="checkbox"/> PPEA <input type="checkbox"/> ESCO	
		<input type="checkbox"/> VPPA Proceed	
		Other: _____	
	Project Group	<input type="checkbox"/> GOB; DPB CO-8 Approval Required <input type="checkbox"/> Pool Funded Project <input type="checkbox"/> Chapter 1 (2008)	
		<input type="checkbox"/> Chapter 781 (2009) <input type="checkbox"/> Chapter 874 (2010) <input type="checkbox"/> Chapter 890 (2011)	
		<input type="checkbox"/> Chapter 3 (2012) <input type="checkbox"/> Chapter 806 (2013) <input type="checkbox"/> Chapter 1 (2014)	
		<input type="checkbox"/> Chapter 2 (2014) <input type="checkbox"/> Chapter 665 (2015)	
	CARS Cost Code	_____	
	Agency Tracking Number	_____	
	Bid Received Date	<input checked="" type="checkbox"/> N/A	_____
	Project Comments	 _____	
	Project Completed	<input type="checkbox"/>	

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

Agency: 501
Project: 18041-000
Mode: Project
Edit
Links
Click Here
Actions
READ ONLY
Save

Project Data
Capital Project
Project
Sub-Project
Project Type
Location (FIPS Co

Clicking on the "Click Here" link on Project Master Record in BITS displays links to all project-related forms.

Pages for Project: 18041-000

Page	Page Information
Project	Title: IMP: ACQUIRE, DESIGN, CONSTRUCT & RENOVATE FACILITIES AT AREA HEADQUARTERS
CO2 Form	Status: IN PROCESS, Rev: , Submit Date: 06/18/2015
CO2 Form	Status: APPROVED, Rev: 5, Submit Date: 03/13/2015
CO2 Form	Status: APPROVED, Rev: 4, Submit Date: 03/06/2015
CO2 Form	Status: APPROVED, Rev: 3, Submit Date: 12/10/2014
CO2 Form	Status: APPROVED, Rev: 2, Submit Date: 08/27/2014
CO2 Form	Status: APPROVED, Rev: 1, Submit Date: 02/28/2014
CO2 Form	Status: APPROVED, Rev: 0, Submit Date: 06/26/2013

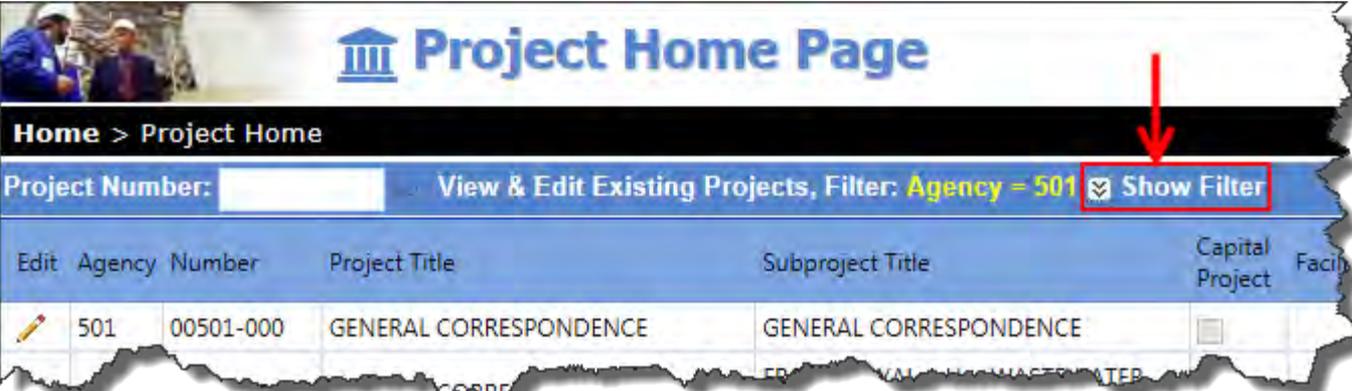
Please Note: Related Pages will be opened in a separate browser window.

Close

These CO form links can then be clicked on to open the full form data record.

“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”

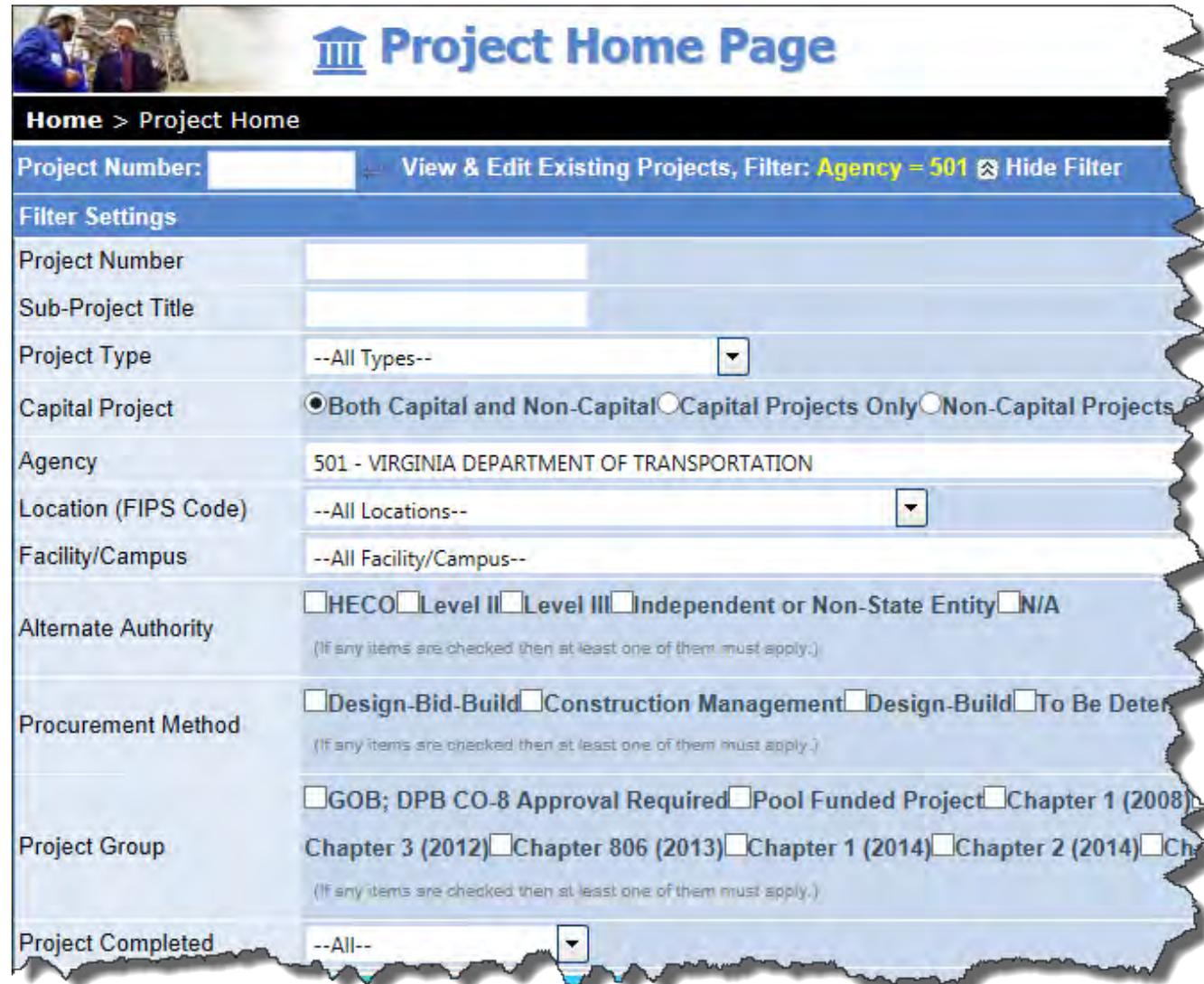


The screenshot shows the 'Project Home Page' interface. At the top, there is a navigation bar with 'Home > Project Home'. Below this, there is a search bar for 'Project Number:' and a button labeled 'View & Edit Existing Projects, Filter: Agency = 501'. To the right of this button is a 'Show Filter' button, which is highlighted with a red box and a red arrow pointing to it. Below the search bar, there is a table with columns for 'Edit', 'Agency Number', 'Project Title', 'Subproject Title', 'Capital Project', and 'Facility'. The table contains one row of data: Agency Number 501, Project Title 00501-000, Project Title GENERAL CORRESPONDENCE, Subproject Title GENERAL CORRESPONDENCE, and a checkbox for Capital Project.

Edit	Agency Number	Project Title	Subproject Title	Capital Project	Facility
	501	00501-000	GENERAL CORRESPONDENCE	GENERAL CORRESPONDENCE	<input type="checkbox"/>

Project Home Page Filters

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

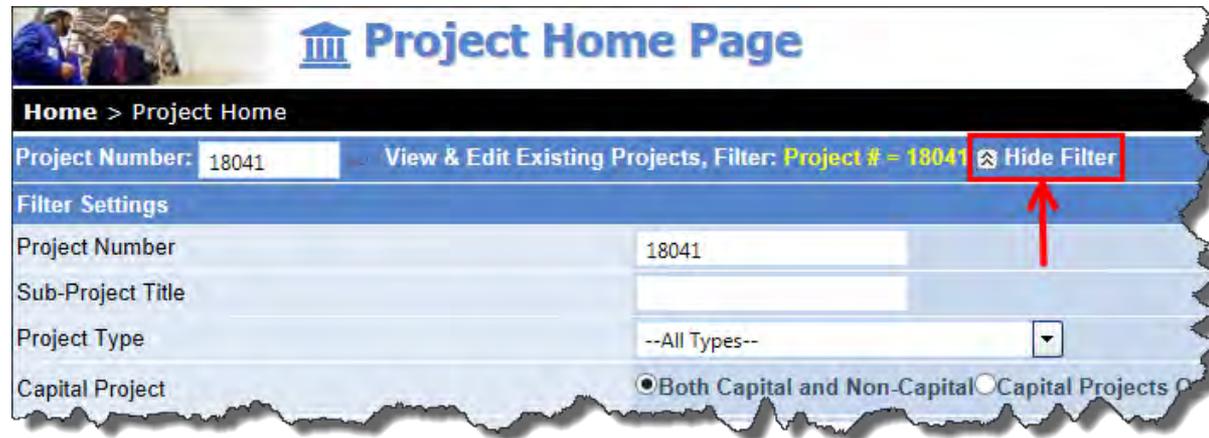


The screenshot shows the 'Project Home Page' interface with various filter settings. The page title is 'Project Home Page' with a logo of a classical building. Below the title, there is a breadcrumb 'Home > Project Home'. A search bar for 'Project Number' is visible, along with a link to 'View & Edit Existing Projects, Filter: Agency = 501' and a 'Hide Filter' button. The 'Filter Settings' section includes the following fields:

Project Number	<input type="text"/>
Sub-Project Title	<input type="text"/>
Project Type	--All Types-- <input type="button" value="v"/>
Capital Project	<input checked="" type="radio"/> Both Capital and Non-Capital <input type="radio"/> Capital Projects Only <input type="radio"/> Non-Capital Projects
Agency	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION
Location (FIPS Code)	--All Locations-- <input type="button" value="v"/>
Facility/Campus	--All Facility/Campus--
Alternate Authority	<input type="checkbox"/> HECO <input type="checkbox"/> Level II <input type="checkbox"/> Level III <input type="checkbox"/> Independent or Non-State Entity <input type="checkbox"/> N/A <small>(If any items are checked then at least one of them must apply.)</small>
Procurement Method	<input type="checkbox"/> Design-Bid-Build <input type="checkbox"/> Construction Management <input type="checkbox"/> Design-Build <input type="checkbox"/> To Be Determined <small>(If any items are checked then at least one of them must apply.)</small>
Project Group	<input type="checkbox"/> GOB; DPB CO-8 Approval Required <input type="checkbox"/> Pool Funded Project <input type="checkbox"/> Chapter 1 (2008) <input type="checkbox"/> Chapter 3 (2012) <input type="checkbox"/> Chapter 806 (2013) <input type="checkbox"/> Chapter 1 (2014) <input type="checkbox"/> Chapter 2 (2014) <input type="checkbox"/> Chapter 4 (2014) <small>(If any items are checked then at least one of them must apply.)</small>
Project Completed	--All-- <input type="button" value="v"/>

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 Home Page

Home > Project Home

Project Number: 18041 View & Edit Existing Projects, Filter: Project # = 18041 **Hide Filter**

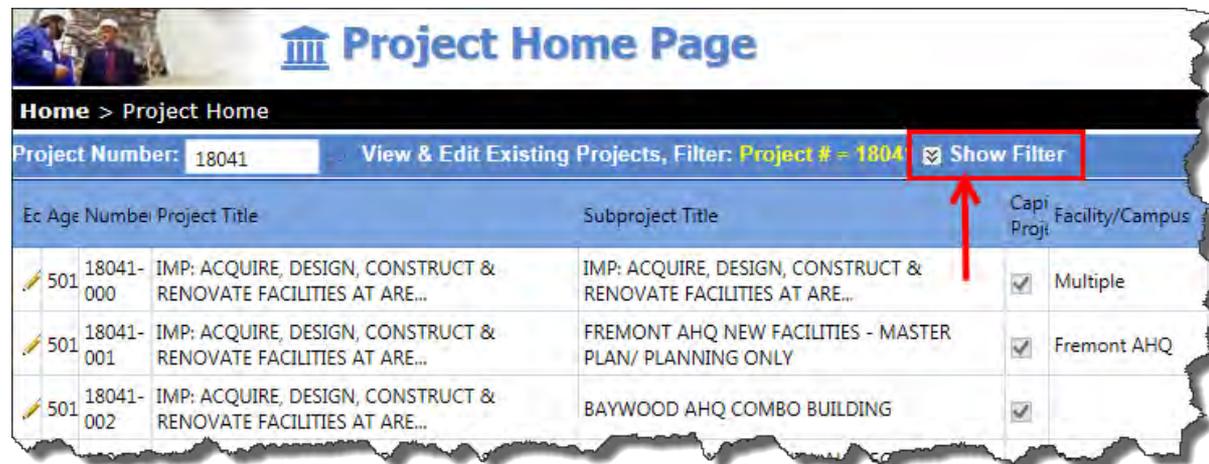
Filter Settings

Project Number: 18041

Sub-Project Title:

Project Type: --All Types--

Capital Project: Both Capital and Non-Capital Capital Projects



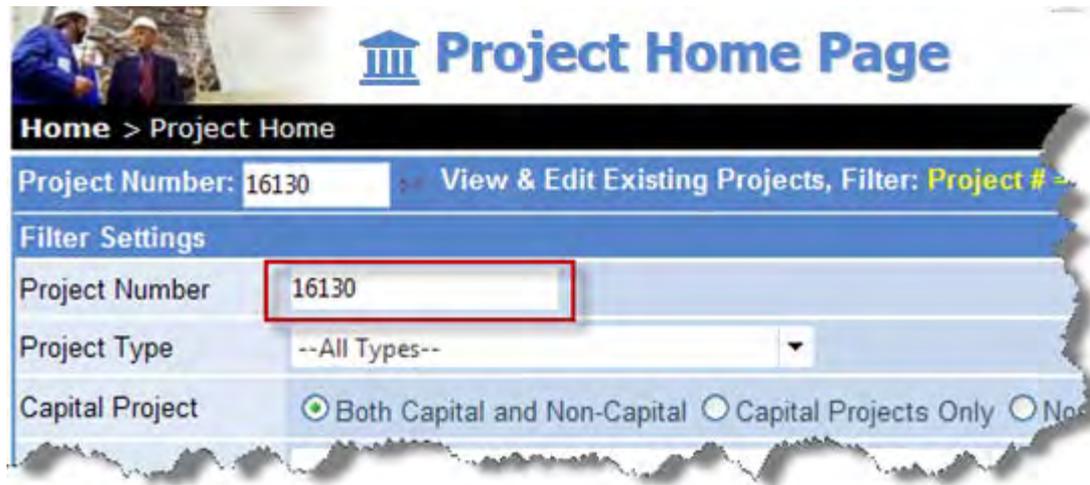
Project Home Page

Home > Project Home

Project Number: 18041 View & Edit Existing Projects, Filter: Project # = 18041 **Show Filter**

Ec Age Number	Project Title	Subproject Title	Cap Proj	Facility/Campus
501	18041-000 IMP: ACQUIRE, DESIGN, CONSTRUCT & RENOVATE FACILITIES AT ARE...	IMP: ACQUIRE, DESIGN, CONSTRUCT & RENOVATE FACILITIES AT ARE...	<input checked="" type="checkbox"/>	Multiple
501	18041-001 IMP: ACQUIRE, DESIGN, CONSTRUCT & RENOVATE FACILITIES AT ARE...	FREMONT AHQ NEW FACILITIES - MASTER PLAN/ PLANNING ONLY	<input checked="" type="checkbox"/>	Fremont AHQ
501	18041-002 IMP: ACQUIRE, DESIGN, CONSTRUCT & RENOVATE FACILITIES AT ARE...	BAYWOOD AHQ COMBO BUILDING	<input checked="" type="checkbox"/>	

The “Project Number” Filter



The screenshot shows the 'Project Home Page' interface. At the top, there is a navigation bar with 'Home > Project Home'. Below this, there is a search bar with 'Project Number: 16130' and a link to 'View & Edit Existing Projects, Filter: Project #'. The 'Filter Settings' section is highlighted in blue and contains three rows: 'Project Number' with a text input field containing '16130' (highlighted with a red box), 'Project Type' with a dropdown menu set to '--All Types--', and 'Capital Project' with three radio buttons: 'Both Capital and Non-Capital' (selected), 'Capital Projects Only', and 'None'.

- 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

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

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 #'s
- 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

The screenshot shows the 'Project Home Page' with a navigation bar 'Home > Project Home'. Below the navigation bar, there is a 'Project Number' input field containing '16130' and a 'View & Edit Existing Projects, Filter: Project #' button. Below this is a 'Filter Settings' section with a 'Project Number' input field also containing '16130', a 'Project Type' dropdown menu set to '--All Types--', and a 'Capital Project' section with radio buttons for 'Both Capital and Non-Capital', 'Capital Projects Only', and 'No'. A red box highlights the 'Project Number' input field in the 'Filter Settings' section, and a red arrow points to it from the text 'Quick Filter Box'.

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

The screenshot shows the 'Project Home Page' with a navigation bar 'Home > Forms Home Page'. Below the navigation bar, there is a 'Project Number' input field containing '16130' and a 'Show All Filter Settings' button. Below this is a 'View & Edit or Copy Existing Forms, Filter: Project # = 16130' section. Below this is a table with columns 'Edit Print Copy Form To Agency Number Tracking SubProject Title'. The table contains three rows of data, all filtered by project number 16130. A red box highlights the 'Project Number' input field, and a red arrow points to it from the text 'After entering a new project number, click here to apply the Quick Filter'.

Edit	Print	Copy Form To	Agency	Number	Tracking	SubProject Title
		--Sele	501	16130-000		IMP; UPGRADE OPERATIONAL FA
		--Sele	501	16130-000		IMP; UPGRADE OPERATIONAL
		--Sele	501	16130-000		IMP; UPGRADE OPERATIONAL

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

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

“Sub Project Title” Filter

- **Sub Project Title** – the title given to any sub project
- The associated filter fields are “free-format” fields, meaning anything can be entered. Use caution when filtering on these fields. For example “Halsy Hall” will not find “Halsey Hall”, but filtering on “Hal” will find both Halsy and Halsey.

Filter Settings

Project Number

Sub-Project Title

Project Type

Edit Agency Number Project Title Subproject Title

No projects exists or no projects exists that you have access to for the current filter settings.

"HALSY" returns no results, but "Hal" returns several.

Filter Settings

Project Number

Sub-Project Title

Project Type All Types

Edit	Agency	Number	Project Title	Subproject Title
	156	98765-000	BUILDING HALL REVOVATIONS	BUILDING <u>HALL</u> REVOVATIONS
	156	98765-001	BUILDING HALL REVOVATIONS	<u>HALSEY HALL</u> RENOVATIONS
	156	98765-002	BUILDING HALL REVOVATIONS	WAGNER <u>HALL</u> RENOVATIONS
	156	98765-005	DSP NON-CAP... PROJECTS	HALSEY CO... DICAT...S-TC

“Project Type” Filter

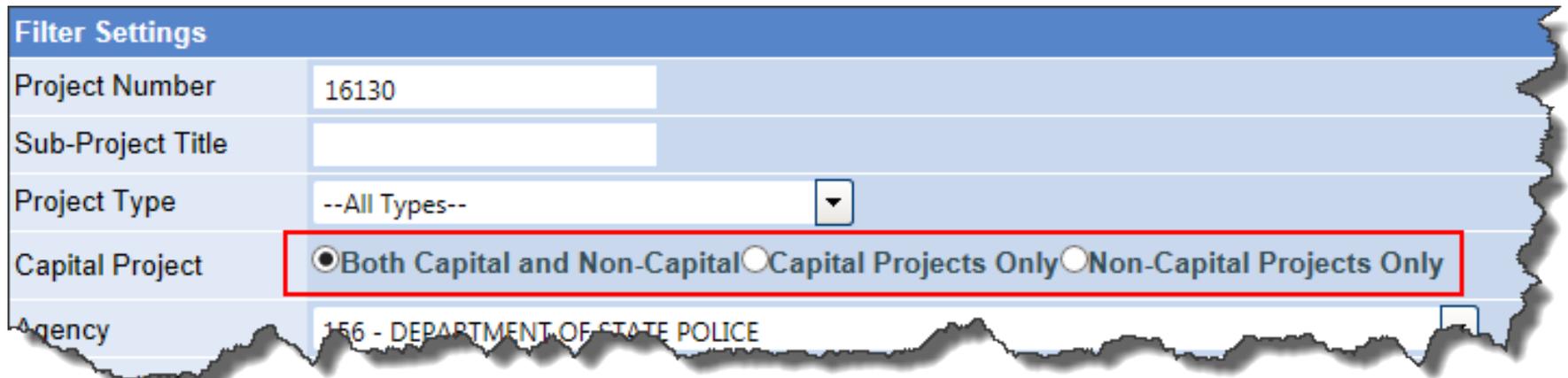
- Users can filter results to include all types of projects or only specific types of projects from a “pick list” of BITS project types
- When using a long “pick list”, you can also type in part of the field, e.g., “DOR” to move quickly down the list

Filter Settings	
Project Number	16130
Sub-Project Title	
Project Type	DORMITORY
Capital Project	DATA / TELECOMMUNICATIONS
Agency	DEMOLITION
Location (FIPS Code)	DINING / FOOD SERVICE
Facility/Campus	DOORS
Alternate Authority	DORMITORY
	DORMITORY / DINING
	ELECTRICAL

Filter Settings	
Project Number	16130
Sub-Project Title	
Project Type	DORMITORY
Capital Project	DORMITORY
Agency	DORMITORY / DINING
Location (FIPS Code)	ELECTRICAL
Facility/Campus	ELEVATOR
Alternate Authority	EMERGENCY GENERATOR

“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



The image shows a screenshot of a web application's 'Filter Settings' section. The form has a blue header and several input fields. A red rectangular box highlights the 'Capital Project' section, which contains three radio button options: 'Both Capital and Non-Capital' (which is selected), 'Capital Projects Only', and 'Non-Capital Projects Only'. Other visible fields include 'Project Number' (16130), 'Sub-Project Title' (empty), 'Project Type' (dropdown menu showing '--All Types--'), and 'Agency' (156 - DEPARTMENT OF STATE POLICE).

Filter Settings	
Project Number	16130
Sub-Project Title	
Project Type	--All Types--
Capital Project	<input checked="" type="radio"/> Both Capital and Non-Capital <input type="radio"/> Capital Projects Only <input type="radio"/> Non-Capital Projects Only
Agency	156 - DEPARTMENT OF STATE POLICE

“Agency” Filter

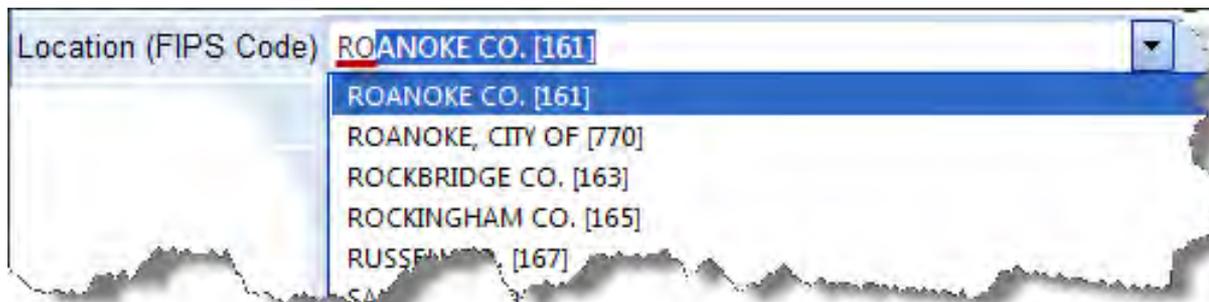
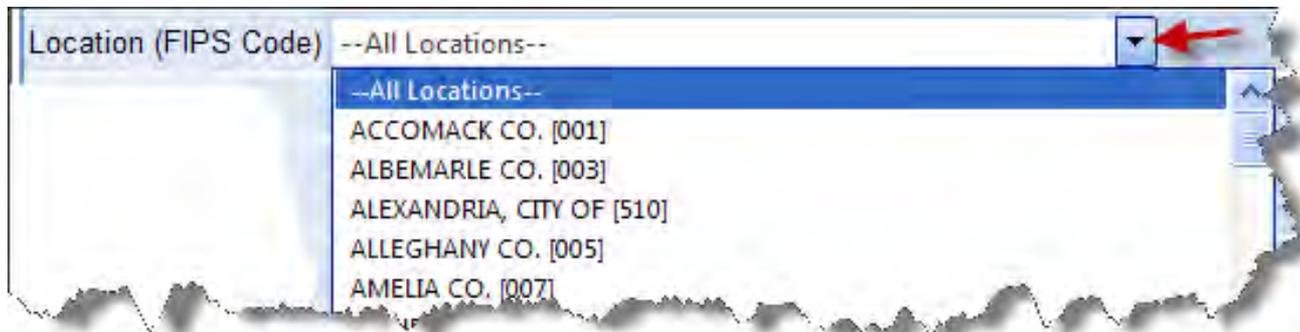
- Central agency users (such as APA or DPB) can filter on all agencies, or on specific agencies, to view project and other form data
- Agency users can only filter on their own agency’s projects and related form data

The image shows a screenshot of a web application's 'Filter Settings' form. The form is titled 'Filter Settings' and contains several input fields and a dropdown menu. The 'Agency' field is highlighted with a red box, and its dropdown menu is open, showing two options: '--All Agencies--' and '501 - VIRGINIA DEPARTMENT OF TRANSPORTATION'. The other fields are: 'Project Number' (16130), 'Sub-Project Title' (empty), 'Project Type' (--All Types--), and 'Capital Project' (radio buttons for 'Both Capital and Non-Capital', 'Capital Projects Only', and 'Non-Capital Pr').

Filter Settings	
Project Number	16130
Sub-Project Title	
Project Type	--All Types--
Capital Project	<input checked="" type="radio"/> Both Capital and Non-Capital <input type="radio"/> Capital Projects Only <input type="radio"/> Non-Capital Pr
Agency	<input type="text" value="--All Agencies--"/> x
	--All Agencies--
	501 - VIRGINIA DEPARTMENT OF TRANSPORTATION

“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



* **FIPS Code** = Federal Information Processing Standard Code. This is a standard numbering system used to identify localities.

Other Project Filters

- Other filters include:
 - Facility/Campus
 - Use the pick list button or type in the first few letters to select a specific Facility/Campus
 - Alternate Authority, Procurement Method and Project Group
 - Use the checkboxes to filter on specific selections within each of these groupings
 - If more than one checkbox is checked within a grouping, BITS will search for records which meet either condition
 - Project Completed

Facility/Campus	--All Facility/Campus--	▼
Alternate Authority	<input type="checkbox"/> HECO <input type="checkbox"/> Level II <input type="checkbox"/> Level III <input type="checkbox"/> Independent or Non-State Entity <input type="checkbox"/> N/A <small>(If any items are checked then at least one of them must apply.)</small>	
Procurement Method	<input type="checkbox"/> Design-Bid-Build <input type="checkbox"/> Construction Management <input type="checkbox"/> Design-Build <input type="checkbox"/> To Be Determined <input type="checkbox"/> PPEA <input type="checkbox"/> ESCO <input type="checkbox"/> VPPA Proceed <small>(If any items are checked then at least one of them must apply.)</small>	
Project Group	<input type="checkbox"/> GOB; DPB CO-8 Approval Required <input type="checkbox"/> Pool Funded Project <input type="checkbox"/> Chapter 1 (2008) <input type="checkbox"/> Chapter 781 (2009) <input type="checkbox"/> Chapter 874 (2010) <input type="checkbox"/> Chapter 890 (2011) <input type="checkbox"/> Chapter 3 (2012) <input type="checkbox"/> Chapter 806 (2013) <input type="checkbox"/> Chapter 1 (2014) <input type="checkbox"/> Chapter 2 (2014) <input type="checkbox"/> Chapter 665 (2015) <small>(If any items are checked then at least one of them must apply.)</small>	
Project Completed	--All--	▼
<input type="button" value="Apply Filter"/> <input type="button" value="Clear Filter"/>		<input type="button" value="Save Grid Sorting"/> <input type="button" value="Reset Grid Sorting"/>

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.

Filter Settings

Project Number = 16130

Sub-Project Title = UPGRADE

Project Type: --All Types--

Capital Project: Both Capital and Non-Capital Capital Projects Only Non-Capital Projects Only

Agency: --All Agencies--

Location (FIPS Code): --All Locations--

Facility/Campus: --All Facility/Campus--

Alternate Authority: HECO Level II Level III Independent or Non-State Entity
(If any items are checked then at least one of them must apply.)

Procurement Method: Design-Bid-Build Construction Management Design-Build
(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 890 (2011) Chapter 3 (2012) Chapter 806 (2013)
(If any items are checked then at least one of them must apply.)

Project Completed: --All--

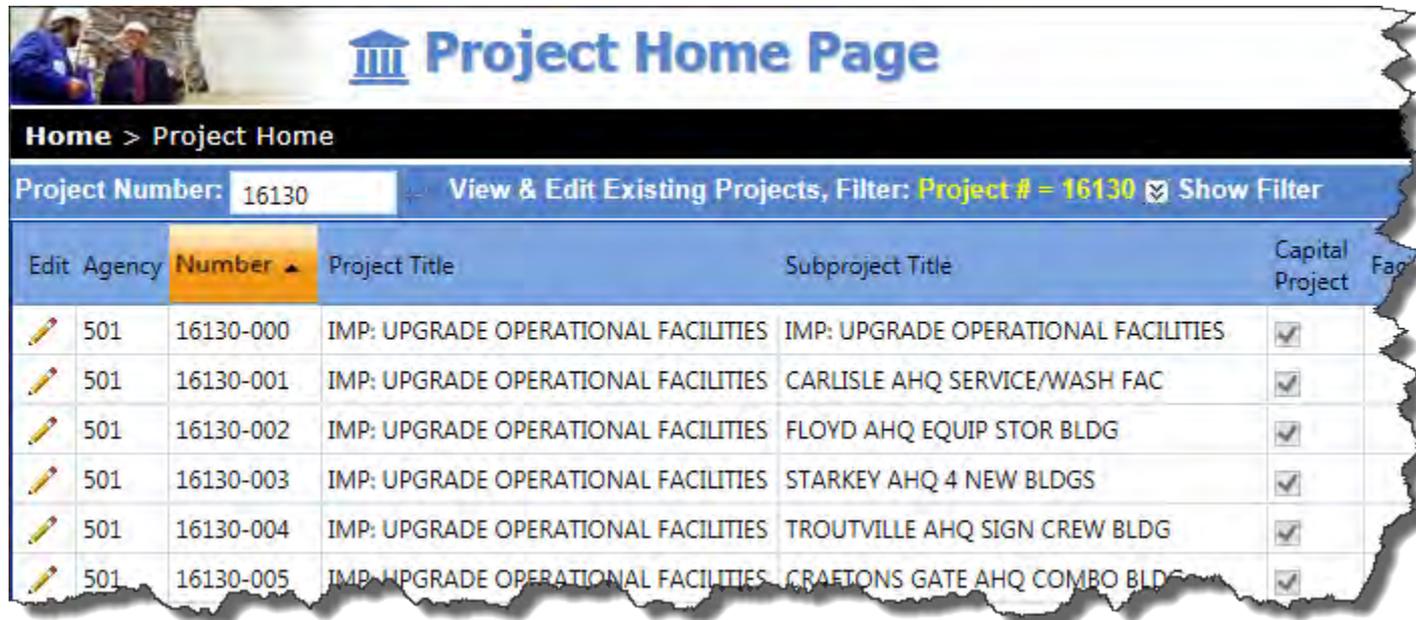
Apply Filter Clear Filter

Edit	Agency	Number	Project Title	Subproject Title
	501	16130-000	IMP: UPGRADE OPERATIONAL FACILITIES	IMP: UPGRADE OPERATIONAL FACILITIES

(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



The screenshot shows the 'Project Home Page' interface. At the top, there is a navigation bar with 'Home > Project Home'. Below this is a search bar for 'Project Number' with the value '16130' and a 'View & Edit Existing Projects, Filter: Project # = 16130' button. A table below the search bar lists projects with columns for 'Edit', 'Agency', 'Number', 'Project Title', 'Subproject Title', 'Capital Project', and 'Flag'. The 'Number' column header has an upward-pointing arrow, indicating ascending sort order. The table contains six rows of project data.

Edit	Agency	Number	Project Title	Subproject Title	Capital Project	Flag
	501	16130-000	IMP: UPGRADE OPERATIONAL FACILITIES	IMP: UPGRADE OPERATIONAL FACILITIES	<input checked="" type="checkbox"/>	
	501	16130-001	IMP: UPGRADE OPERATIONAL FACILITIES	CARLISLE AHQ SERVICE/WASH FAC	<input checked="" type="checkbox"/>	
	501	16130-002	IMP: UPGRADE OPERATIONAL FACILITIES	FLOYD AHQ EQUIP STOR BLDG	<input checked="" type="checkbox"/>	
	501	16130-003	IMP: UPGRADE OPERATIONAL FACILITIES	STARKEY AHQ 4 NEW BLDGS	<input checked="" type="checkbox"/>	
	501	16130-004	IMP: UPGRADE OPERATIONAL FACILITIES	TROUTVILLE AHQ SIGN CREW BLDG	<input checked="" type="checkbox"/>	
	501	16130-005	IMP: UPGRADE OPERATIONAL FACILITIES	CRAFTONS GATE AHQ COMBO BLDG	<input checked="" type="checkbox"/>	

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)

NOTE: The up-down arrows may or may not show based on the Skin type being used

Sorting the Columns (cont.)

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



Project Home Page

Home > Project Home

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

Edit	Agency	Number	Project Title	Subproject Title	Capital Project	Fac
	501	16130-000	IMP: UPGRADE OPERATIONAL FACILITIES	IMP: UPGRADE OPERATIONAL FACILITIES	<input checked="" type="checkbox"/>	
	501	16130-001	IMP: UPGRADE OPERATIONAL FACILITIES	CARLISLE AHQ SERVICE/WASH FAC	<input checked="" type="checkbox"/>	
	501	16130-002	IMP: UPGRADE OPERATIONAL FACILITIES	FLOYD AHQ EQUIP STOR BLDG	<input checked="" type="checkbox"/>	
	501	16130-003	IMP: UPGRADE OPERATIONAL FACILITIES	STARKEY AHQ 4 NEW BLDGS	<input checked="" type="checkbox"/>	
	501	16130-004	IMP: UPGRADE OPERATIONAL FACILITIES	TROUTVILLE AHQ SIGN CREW BLDG	<input checked="" type="checkbox"/>	
	501	16130-005	IMP: UPGRADE OPERATIONAL FACILITIES	CRAFTONS GATE AHQ COMBO BLDG	<input checked="" type="checkbox"/>	

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



Project Home Page

Home > Project Home

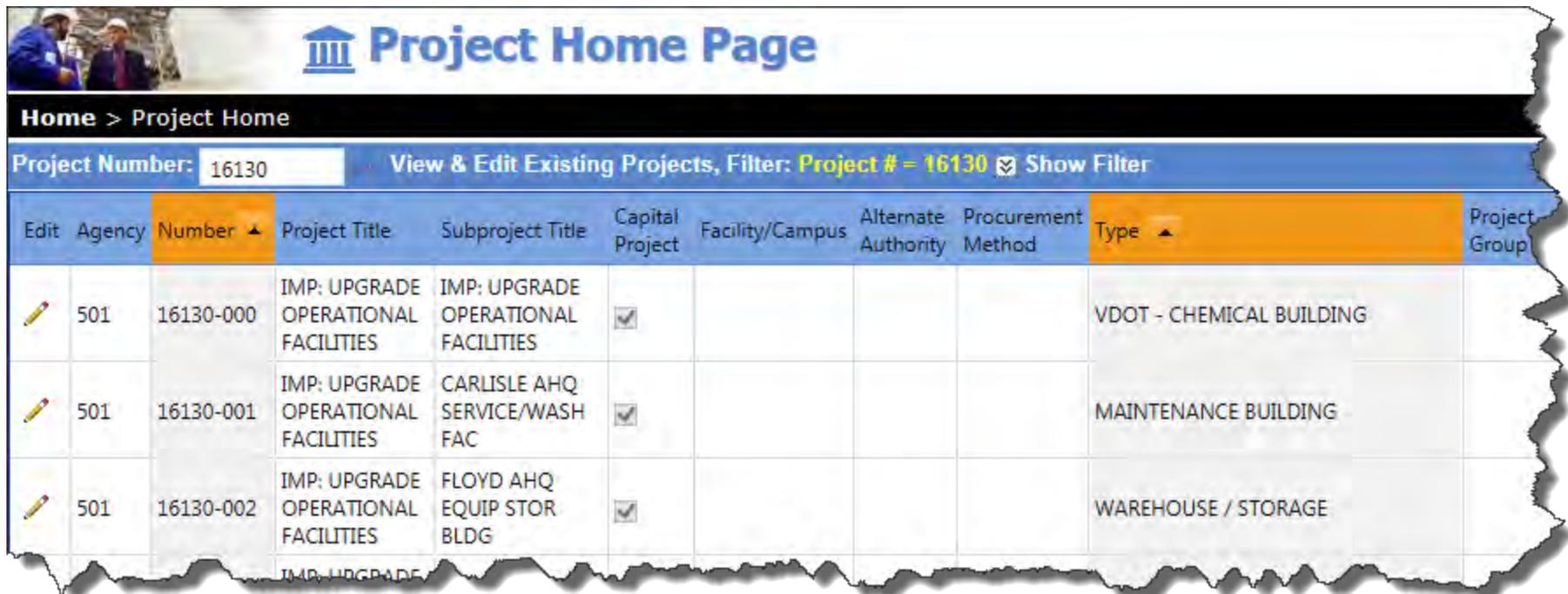
Project Number: 16130 View & Edit Existing Projects, Filter: Project # = 16130 Show Filter

Edit	Agency	Number	Project Title	Subproject Title	Capital Project	Fac
	501	16130-000	IMP: UPGRADE OPERATIONAL FACILITIES	IMP: UPGRADE OPERATIONAL FACILITIES	<input checked="" type="checkbox"/>	
	501	16130-001	IMP: UPGRADE OPERATIONAL FACILITIES	CARLISLE AHQ SERVICE/WASH FAC	<input checked="" type="checkbox"/>	
	501	16130-002	IMP: UPGRADE OPERATIONAL FACILITIES	FLOYD AHQ EQUIP STOR BLDG	<input checked="" type="checkbox"/>	
	501	16130-003	IMP: UPGRADE OPERATIONAL FACILITIES	STARKEY AHQ 4 NEW BLDGS	<input checked="" type="checkbox"/>	
	501	16130-004	IMP: UPGRADE OPERATIONAL FACILITIES	TROUTVILLE AHQ SIGN CREW BLDG	<input checked="" type="checkbox"/>	
	501	16130-005	IMP: UPGRADE OPERATIONAL FACILITIES	CRAETONS GATE AHQ COMBO BLDG	<input checked="" type="checkbox"/>	

- 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



Project Home Page

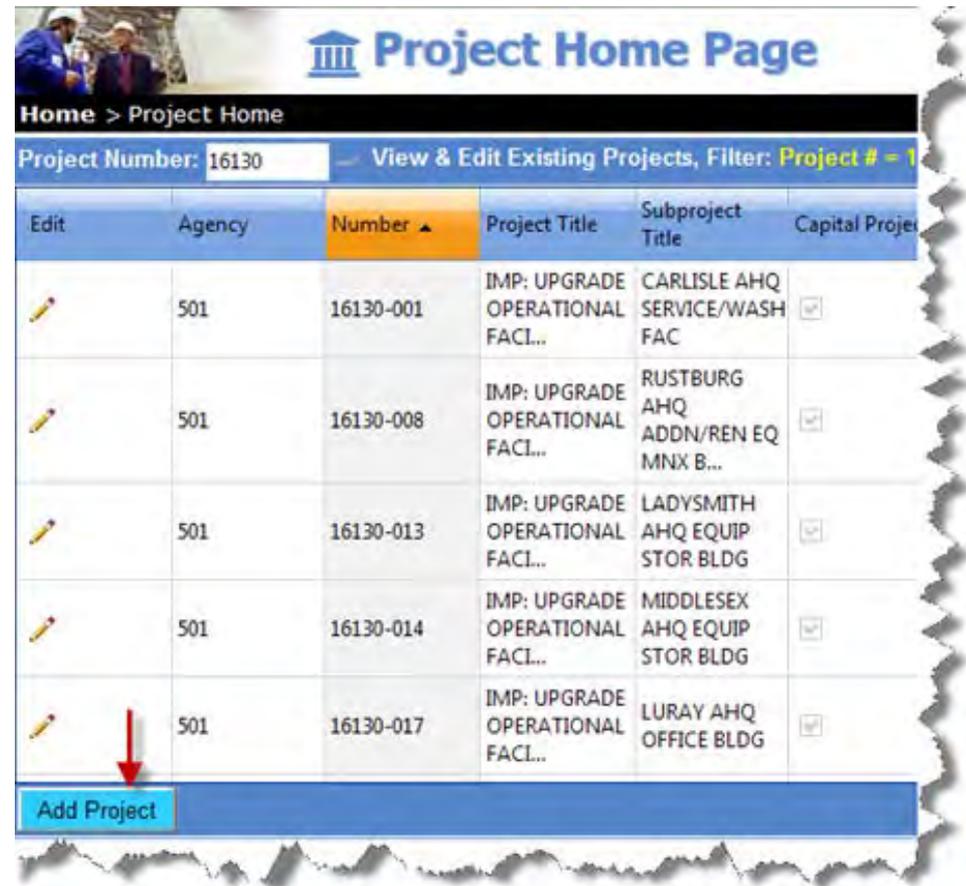
Home > Project Home

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

Edit	Agency	Number	Project Title	Subproject Title	Capital Project	Facility/Campus	Alternate Authority	Procurement Method	Type	Project Group
	501	16130-000	IMP: UPGRADE OPERATIONAL FACILITIES	IMP: UPGRADE OPERATIONAL FACILITIES	<input checked="" type="checkbox"/>				VDOT - CHEMICAL BUILDING	
	501	16130-001	IMP: UPGRADE OPERATIONAL FACILITIES	CARLISLE AHQ SERVICE/WASH FAC	<input checked="" type="checkbox"/>				MAINTENANCE BUILDING	
	501	16130-002	IMP: UPGRADE OPERATIONAL FACILITIES	FLOYD AHQ EQUIP STOR BLDG	<input checked="" type="checkbox"/>				WAREHOUSE / STORAGE	
			IMP: UPGRADE							

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



The screenshot displays the 'Project Home Page' interface. At the top, there is a navigation bar with 'Home > Project Home' and a search field for 'Project Number: 16130'. Below this is a table with columns: Edit, Agency, Number, Project Title, Subproject Title, and Capital Project. The table contains five rows of project data. A red arrow points to the 'Add Project' button at the bottom of the table.

Edit	Agency	Number	Project Title	Subproject Title	Capital Project
	501	16130-001	IMP: UPGRADE OPERATIONAL FACL..	CARLISLE AHQ SERVICE/WASH FAC	<input checked="" type="checkbox"/>
	501	16130-008	IMP: UPGRADE OPERATIONAL FACL..	RUSTBURG AHQ ADDN/REN EQ MNX B...	<input checked="" type="checkbox"/>
	501	16130-013	IMP: UPGRADE OPERATIONAL FACL..	LADYSMITH AHQ EQUIP STOR BLDG	<input checked="" type="checkbox"/>
	501	16130-014	IMP: UPGRADE OPERATIONAL FACL..	MIDDLESEX AHQ EQUIP STOR BLDG	<input checked="" type="checkbox"/>
	501	16130-017	IMP: UPGRADE OPERATIONAL FACL..	LURAY AHQ OFFICE BLDG	<input checked="" type="checkbox"/>

[Add Project](#)

(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

Running Reports

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

Reports

- The “Reports” Page can be accessed from the BITS Home Page:

BITS Home Page



The Reports List



- Reports are grouped under various categories
- To expand a category, to view the reports listed within it, click on the plus (+) sign
- To collapse the list of reports in a category, click on the minus (-) sign
- Once the desired report is located, click on the report name to begin executing it

Report Parameters

- After selecting a report, a list of report parameter fields will appear on the right-hand side of the screen
- Report parameters work in much the same manner as filter selections do for other BITS pages
- Parameters give users the ability to select the specific data to be reported

Reports

Home > Reports

Report List

- CAPITAL OUTLAY REPORTS
 - CO-310: Form Status
- SYSTEM ADMIN/CONFIG REPORTS
 - AuthUser: Authorized User Listing
 - SYSADM-040NL: Authorized Users by Name or User-Id**
 - SYSADM-060: Authorized Users by System Role

SYSADM-040NL: Authorized Users by Name or User-Id
Authorized Users by Name or Login (with Roles, Rights info)

Report Data Selection Filters and/or Formatting Parameters

Agencies: --All Agencies--

Active Users Only?: Active Only

Sort Order: User-Id, Name (Last, First M), Roles, Rights

Run Report Reset Parameters

Report Parameters (cont'd)

- In addition to parameters, the user may also select from various methods to sort the data
- The number and type of parameters and sorts vary by report
- After parameters and sorts have been selected, click the “Run Report” button
- To clear all parameter settings (to start over), click on “Reset Parameters”
- **It is highly recommended BITS users always click the “Reset Parameters” before specifying the parameters to use for a report**

The screenshot displays the 'Reports' section of a web application. The breadcrumb navigation shows 'Home > Reports'. The main content area is titled 'Report List' and contains a sidebar with a tree view of report categories. The selected report is 'SYSADM-040NL: Authorized Users by Name or User-Id'. The main panel shows the report title and subtitle, followed by a section for 'Report Data Selection Filters and/or Formatting Parameters'. This section includes three dropdown menus: 'Agencies' (set to '--All Agencies--'), 'Active Users Only?' (set to 'Active Only'), and 'Sort Order' (set to 'User-Id, Name (Last, First M), Roles, Rights'). At the bottom of this section are two buttons: 'Run Report' and 'Reset Parameters'. A red arrow points from the 'SYSADM-040NL' report name in the sidebar to the 'Report Data Selection Filters and/or Formatting Parameters' section.

Navigating the Report in Print Preview

Preview.....

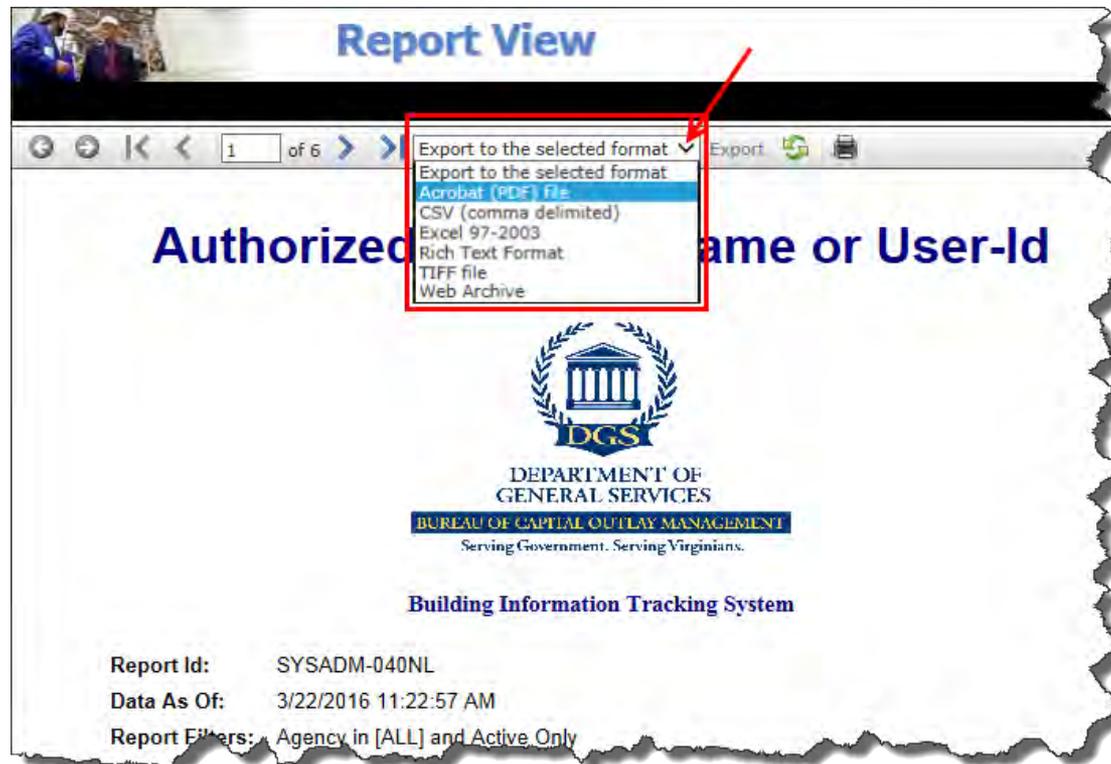
- The four VCR buttons at the top of the print preview screen, respectively from left to right, perform the following functions:
 - Go to first page
 - Go backward one page
 - Go forward one page
 - Go to last page
- The first page of each BITS report is always a cover page. It identifies items such as the:
 - Report Name
 - Report ID
 - Report Date
 - Filters Used
 - Data Groupings
 - Sort Orders



The screenshot shows a web browser window displaying a report preview. The title bar reads "Report View". Below the title bar is a navigation toolbar with four buttons: a double left arrow, a single left arrow, a page number "1 of 6", and a single right arrow. These four buttons are highlighted with a red box, and a red arrow points to the double left arrow button. To the right of the navigation buttons are options for "Export to the selected format", "Export", a refresh icon, and a printer icon. The main content area displays the report title "Authorized Users by Name or User-Id" in large blue font. Below the title is the logo of the Department of General Services, Bureau of Capital Outlay Management, with the tagline "Serving Government. Serving Virginians." and the system name "Building Information Tracking System". At the bottom, the report details are listed: Report Id: SYSADM-040NL, Data As Of: 3/22/2016 11:22:57 AM, and Report Filters: Agency in [ALL] and Active Only.

Printing Reports

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



The screenshot shows a web application interface titled "Report View". At the top, there is a navigation bar with a back button, a page indicator "1 of 6", and an "Export" button. A dropdown menu is open, showing the following options: "Export to the selected format", "Export to the selected format", "Acrobat (PDF) File", "CSV (comma delimited)", "Excel 97-2003", "Rich Text Format", "TIFF file", and "Web Archive". A red arrow points to the "Export" button, and a red box highlights the dropdown menu. Below the navigation bar, the text "Authorized" and "ame or User-Id" is visible. In the center, there is a logo for the Department of General Services, Bureau of Capital Outlay Management, with the tagline "Serving Government. Serving Virginians." Below the logo, the text "Building Information Tracking System" is displayed. At the bottom, the following information is shown: "Report Id: SYSADM-040NL", "Data As Of: 3/22/2016 11:22:57 AM", and "Report Filters: Agency in [ALL] and Active Only".

Printing Reports (cont'd)

- Clicking on the icon highlighted below will re-query the database to refresh the results (Refreshing is very rarely required.)



The screenshot shows a web application interface for a report. At the top, there is a header with the text "Report View" and a small image of two people. Below the header is a navigation bar containing a search icon, a back icon, a page number "1 of 6", a forward icon, a dropdown menu labeled "Export to the selected format", an "Export" button, a refresh icon (a circular arrow) which is highlighted with a red box and a red arrow, and a printer icon. The main content area features the title "Authorized Users by Name or User-Id" in large blue font. Below the title is the logo of the Department of General Services (DGS), which includes a building icon and the text "DEPARTMENT OF GENERAL SERVICES" and "BUREAU OF CAPITAL OUTLAY MANAGEMENT". Underneath the logo is the tagline "Serving Government. Serving Virginians." and the system name "Building Information Tracking System". At the bottom of the page, there is a section for report details: "Report Id: SYSADM-040NL", "Data As Of: 3/22/2016 11:22:57 AM", and "Report Filters: Agency in [ALL] and Active Only".

Printing Reports (cont'd)

- Clicking on the printer icon highlighted below will send the form to the user's default printer
 - If printing to the user's default printer does not produce adequate results, try first exporting report to pdf format and then print the pdf file to a desired printer



The screenshot shows a web browser window displaying a report. The browser's address bar shows the page number '1 of 6' and an 'Export' button. A red box highlights the printer icon in the browser's toolbar, with a red arrow pointing to it. The report content includes the title 'Authorized Users by Name or User-Id', the DGS logo, and the text 'DEPARTMENT OF GENERAL SERVICES BUREAU OF CAPITAL OUTLAY MANAGEMENT Serving Government. Serving Virginians. Building Information Tracking System'. At the bottom, the report details are listed: Report Id: SYSADM-040NL, Data As Of: 3/22/2016 11:22:57 AM, and Report Filters: Agency in [ALL] and Active Only.

Report View

1 of 6 | Export to the selected format | Export | 

Authorized Users by Name or User-Id



DEPARTMENT OF
GENERAL SERVICES
BUREAU OF CAPITAL OUTLAY MANAGEMENT
Serving Government. Serving Virginians.

Building Information Tracking System

Report Id: SYSADM-040NL
Data As Of: 3/22/2016 11:22:57 AM
Report Filters: Agency in [ALL] and Active Only

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

“Documents”

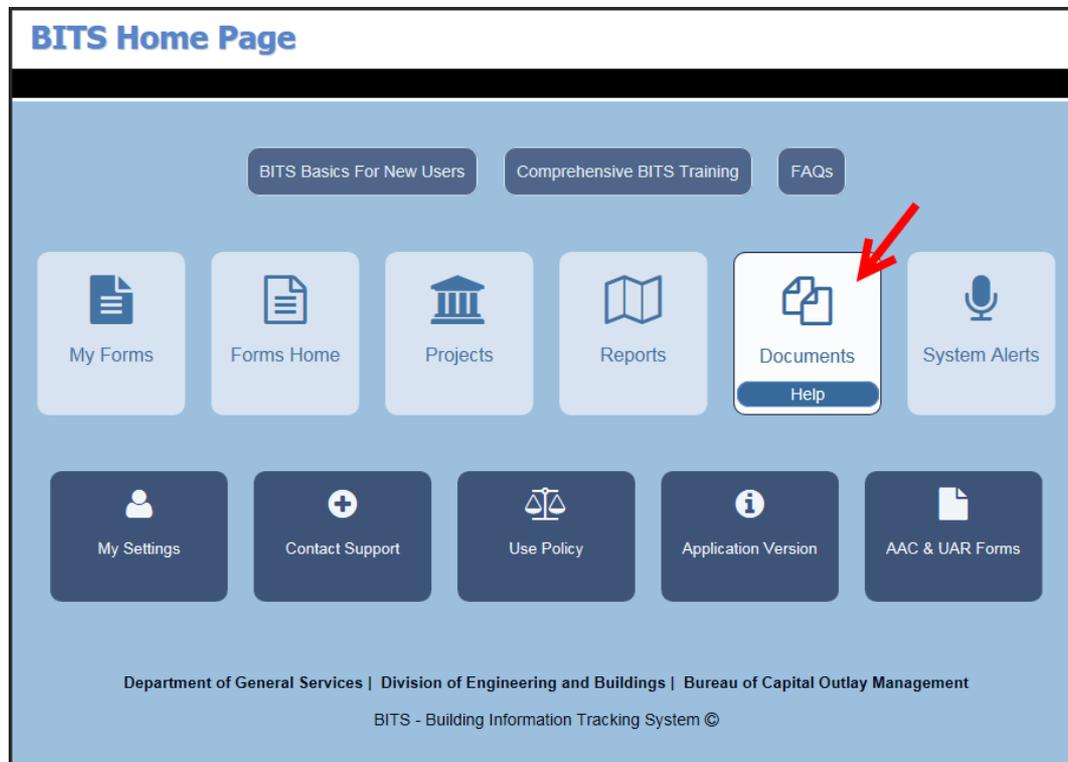
*Commonwealth of Virginia
Department of General Services
Division of Engineering & Buildings
Bureau of Capital Outlay Management*

Document Access

- BCOM has two key information systems, this web-accessible database system – BITS – and a document management system – SharePoint.
- DGS Information Technology staff assisted BCOM in developing a secure means for the Bureau to share selected SharePoint project documents with agency users via the Documents page in BITS.
- The types of documents provided via the Documents page are review comments and other types of project documents that BCOM currently distributes to agencies and design consultants via email or other means.
- The Documents page does not replace the current method of BCOM distributing documents via email, but rather, is intended as a means to allow agency users easy access to view pertinent project documents for historical purposes
- Agency Access Coordinators are responsible for approving their agency's BITS users access to the Documents page

Document Access

- The Documents page is accessible from the BITS Home Page
- Please refer to the next slide for an example screenshot and a description of the user interface



1. The user keys in the 5-digit Project and the 3-digit Subproject code. The user's agency is known from the user's BITS account information. The user can only view documents for their agency's projects. Other search criteria may be optionally entered to further narrow the returned document results.
2. Based on the search criteria the user entered, BITS queries and returns the names of all associated project documents from the Bureau's document management system that BCOM's review staff have marked as agency-accessible. (**NOTE: The initial document query in a given BITS session may take up to one minute, but thereafter the results are displayed almost instantaneously. See the next slide for more information.**)
3. To view and/or save a copy of a specific document, the user clicks the "Download" button.

The screenshot shows the 'Document Library' interface. At the top, there is a navigation bar with 'Home > Document Library' and a version indicator 'tcrooks501 | v1.5.7'. Below this is a 'Filter Settings' section with input fields for 'Agency Code (required): 501', 'Project Number (required): A5501', 'Subproject Number (required): 014', and 'Other Search Criteria (optional):'. A red arrow labeled '1' points to the search filter fields. Below the filters are 'Apply Filter' and 'Clear Filter' buttons. A note states: 'After clicking "Apply Filter" the initial results may take up to 1 minutes to display. Subsequent results will display almost instantaneously.' Below the note is a table with columns: 'Download', 'Agency Code', 'Project List', 'Sub project', 'Document Name', 'Modified', 'Modified By', and 'Document Id'. A red arrow labeled '2' points to the 'Sub project' column, and another red arrow labeled '3' points to the 'Download' button in the first row of the table. The table contains four rows of document information.

Download	Agency Code	Project List	Sub project	Document Name	Modified	Modified By	Document Id
Download	501	A5501 - 2015 Non-Cap Projects	014	wd1-a-c01-lch-501-A5501-014.docx	06/08/2015	Harcum, Les (DGS)	BCOM-1991-73
Download	501	A5501 - 2015 Non-Cap Projects	014	wd1-m-c01-lrg-501-A5501-014.docx	06/12/2015	Harcum, Les (DGS)	BCOM-1991-79
Download	501	A5501 - 2015 Non-Cap Projects	014	wd1-c-c01-jhf-A5501-014.docx	06/12/2015	Harcum, Les (DGS)	BCOM-1991-80
Download	501	A5501 - 2015 Non-Cap Projects	014	VDOT - Hampton Roads District Office Administration Bldg IT Room HVAC Renovation_1r6gppcq.msg	06/12/2015	Harcum, Les (DGS)	BCOM-1991-85

Document Access - FAQs

- Why does the initial document query take up to 1 minute?
 - To assure complete results, BITS first queries the SharePoint document system to obtain an updated listed of all documents currently marked as agency-accessible, and then loads the document names and other key document attributes into BITS. Once that initial load is completed, querying on other projects and downloading documents, proper, is almost instantaneous (depending on the size of the file being downloaded).
- Why can't I see BCOM's documents for my project?
 - This is a new feature, to both BCOM and Agency staff, effective for the first time in the April 2016 release of BITS. Although BCOM Reviewers have marked selected pre-April 2016 project documents as agency-accessible for test purposes, the bulk of the documents made accessible will be from April 2016 and beyond.
- Will BCOM discontinue emailing documents?
 - No. For now, BCOM staff will continue to use email as the primary means of document distribution. This alternative form of access is primarily for agency's historical access to BCOM's project documents.

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 generally have an expiration limit for display
- When a user logs into BITS any new alerts will be automatically displayed
- Any active alerts that a user has already viewed once will no longer be displayed at subsequent logins, however, the user can view all active alerts by accessing the System Alerts page as illustrated on the next slide

BITS Alerts

- “BITS Alerts” can be accessed from the BITS Home Page

BITS Home Page



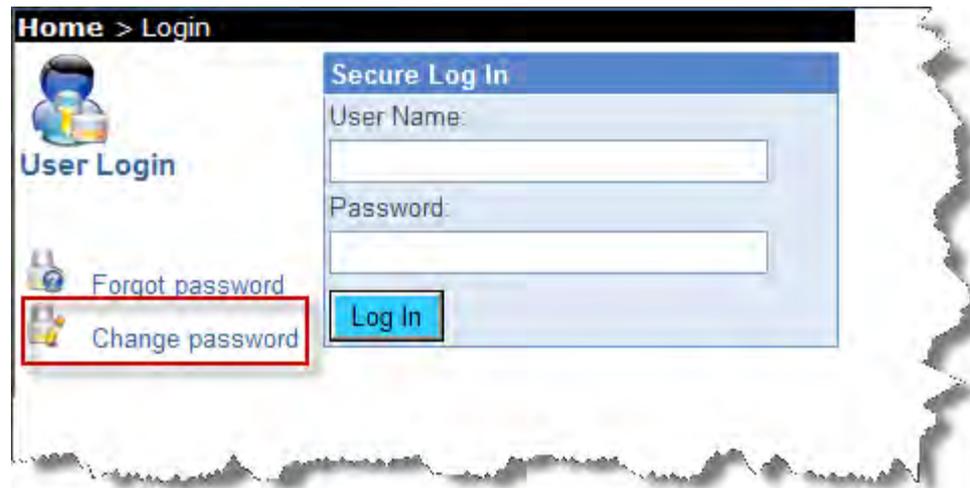
Building Information Tracking System

Changing Personal Settings

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

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



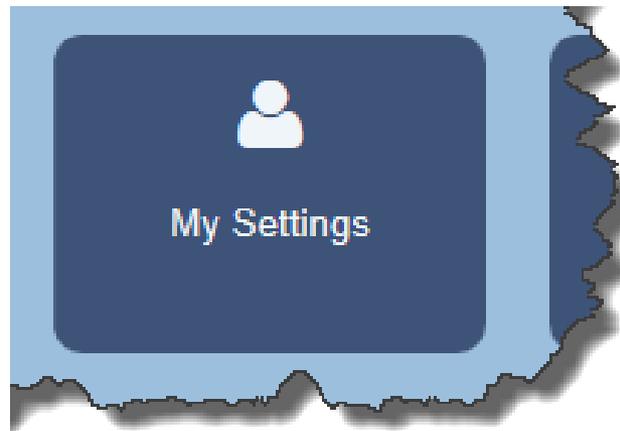
- The “Change Password” function is also available on the “My BITS Settings” page and is described on the next several slides

Changing Passwords (cont'd)

- Click on the “Home” icon to access the “BITS Home Page”

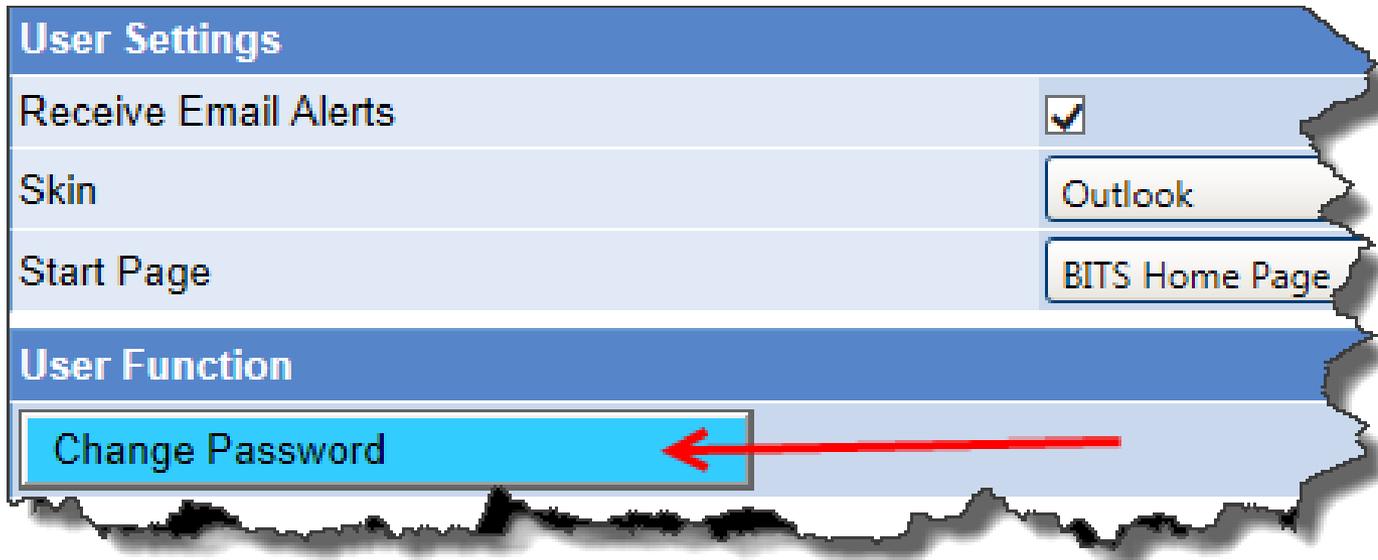


- On the “BITS Home Page”, click on “My Settings”:



Changing Passwords (cont'd)

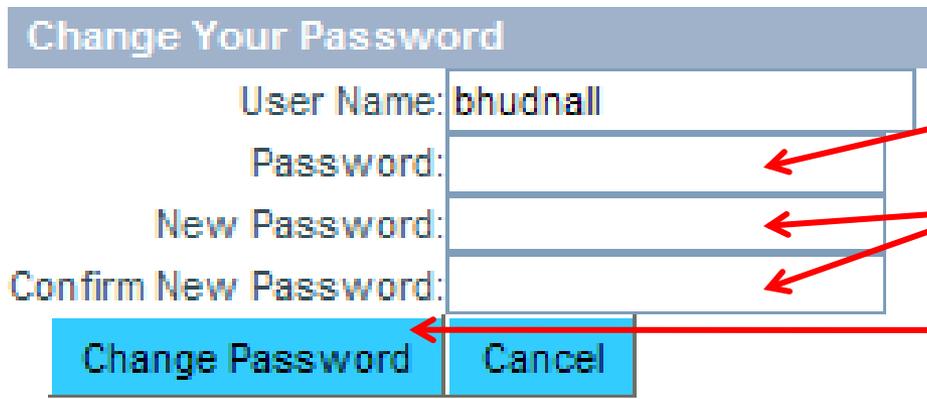
- Under the “User Function” section, select “Change Password”:



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

Changing Passwords (cont'd)

- On the “Change Your Password” page:



The screenshot shows a form titled "Change Your Password" with the following fields and buttons:

- User Name: bhudnall
- Password: [Empty field]
- New Password: [Empty field]
- Confirm New Password: [Empty field]
- Change Password button
- Cancel button

Red arrows point from the text instructions to the corresponding fields and buttons:

- “Type in your current password.” points to the Password field.
- “Type in your new password.” points to the New Password field.
- “Click on the “Change Password” button to process the change.” points to the Change Password button.

- Click on the “Save” icon to complete the password change



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

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
- Users must keep their e-mail addresses current 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	<input type="text"/> <i>Optional: Enter the alternate email address where you want notifications to be delivered to.</i>
Phone Number	999-999-9999

Email Address vs. Notification Email Address

- **Email Address:**
 - 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 <i>Optional: Enter the alternate email address where you want notifications to be delivered to.</i>
Phone Number	999-999-9999

Email Address vs. Notification Email Address (cont'd)

■ 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 <i>Optional: Enter the alternate email address where you want notifications to be delivered to.</i>
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	<input type="text"/>
	<i>Optional: Enter the alternate email address where you want notifications to be delivered to.</i>

- 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
	<i>Optional: Enter the alternate email address where you want notifications to be delivered to.</i>

Examples of Email Settings (cont'd)

- 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.

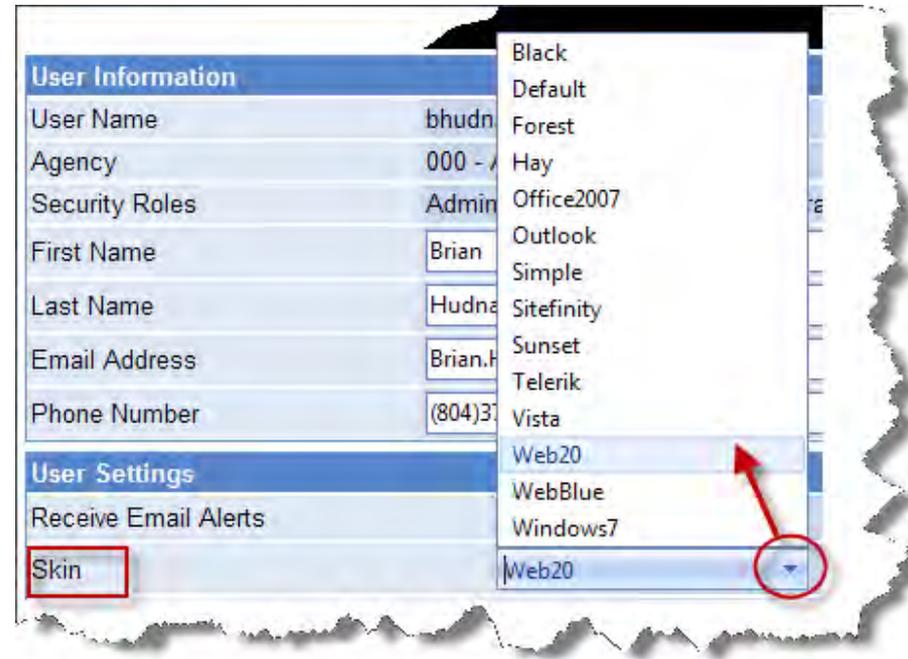
Receive Email Alerts

- 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.



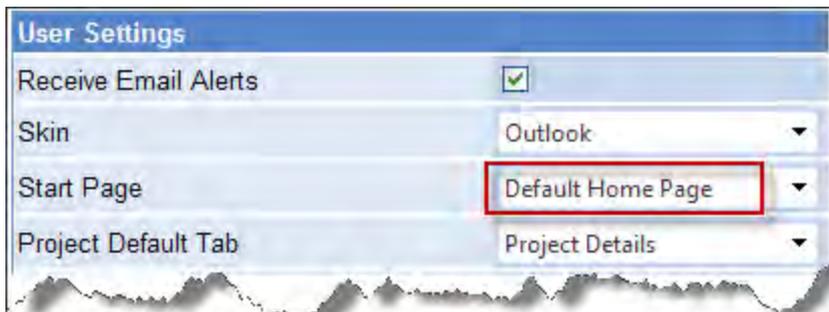
Skins

- 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

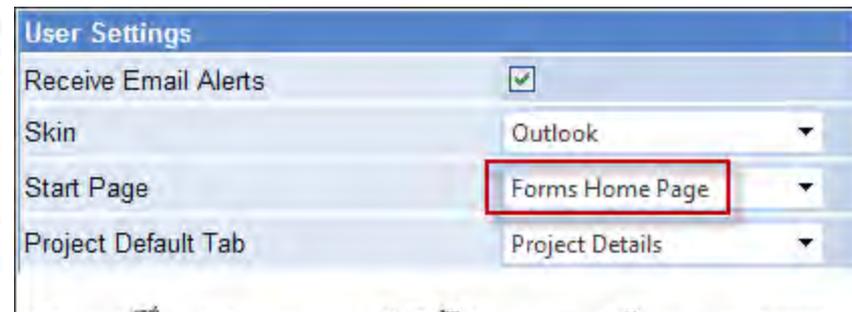


Start Page

- 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 defaults to the BITS Home Page
- To select a different Start Page, click on the pick list shown below and then select from the available choices
- Click “Save” to accept the change



A screenshot of the 'User Settings' window. The 'Start Page' dropdown menu is highlighted with a red box and shows 'Default Home Page' as the selected option. Other settings include 'Receive Email Alerts' (checked), 'Skin' (Outlook), and 'Project Default Tab' (Project Details).



A screenshot of the 'User Settings' window. The 'Start Page' dropdown menu is highlighted with a red box and shows 'Forms Home Page' as the selected option. Other settings include 'Receive Email Alerts' (checked), 'Skin' (Outlook), and '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 BITS Home Page to the Forms Home Page or the My Forms Page.