



## Continuity of Business Operations for Trade Contractors

**Jeff Sample, Director of Strategic Accounts**



## WHY ME?

- ▣ 20 YEARS – Information Technology Services
- ▣ DevOps Engineer–*Software Development Lifecycle*
- ▣ SaaS Design      ▣ API's
- ▣ Cloud Solutions    ▣ RFID
  
- ▣ **CONSTRUCTION IT**
  - IT Director
  - Safety Committee Member
  - Director of Media - JBKnowledge
  
- ▣ Hospitality, Ski Resorts, & Health Care
- ▣ Skier & IRONMAN enthusiast



# POWER TO THE TRADES

- ✓ Consultative Conversations
- ✓ Educational Webinars
- ✓ Best Practice Guides

[www.eSUB.com](http://www.eSUB.com)

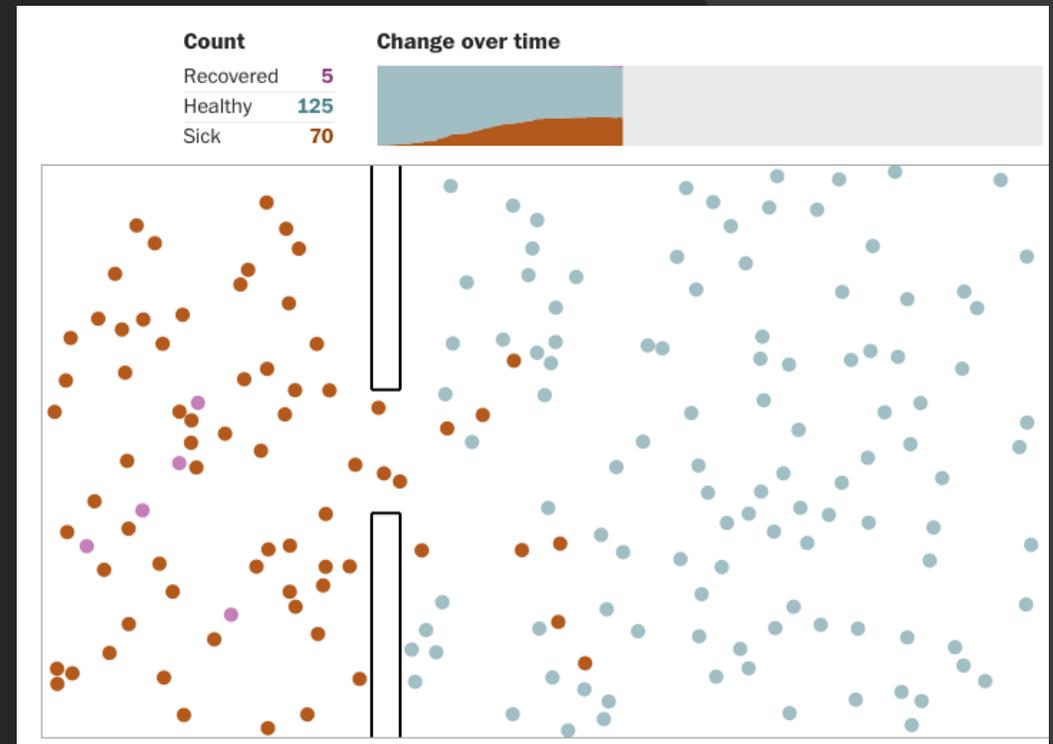


# Agenda

- Leadership – Beyond the Tools
- Project Documentation
- Remote Tools
- Extra Resources

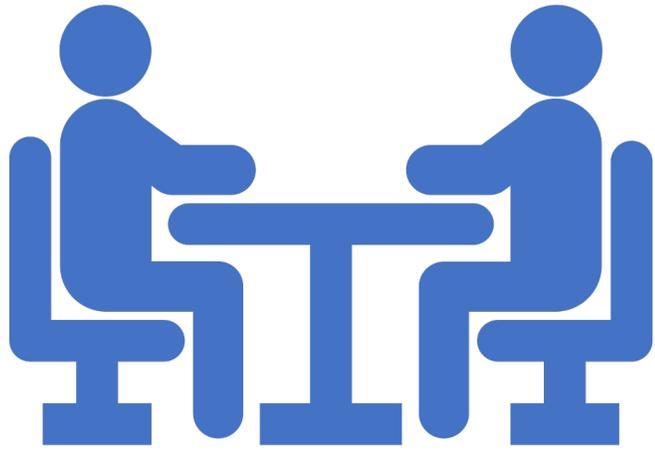
# Leadership

- **Communication**
- **General Safety & Social Distancing**  
[Washington Post article](#) demonstrates the power of social distancing.
- **Stress Mitigation**
- **Jobsite Safety**



# Communication

Single Source of Truth



## Create a Communication Team and Hub

1. No more than 3-5 people - leadership team/corporate communications/ HR executive
2. Meet regularly to monitor situation as it evolves
3. Main source of information about the crisis
4. Regular updates to team-Daily

Transparent-what you know, what you don't know, and your sources of information

Succinct-explain in clear language, not lawyer speak

# Company Operations Tiers



## Tier 1 – Normal Operations



## Tier 2 – Abundance of Caution

No business travel to high-risk areas  
Enforce adherence to sick leave / work from home guidance  
Personal travel to high-risk areas must be followed by 14 days of self-quarantine  
For the next 8 weeks, no conference attendance



## Tier 3 – Minimize Exposure

Essential business travel only (CEO must approve)  
Personal attendance at large public gatherings must be followed by 14 days of self-quarantine (ex: foreign & domestic travel, amusement parks, sporting events, 500+ attendees)  
Individuals at high risk or with family members at high risk may work from home after working out a plan with your manager's approval  
No conference attendance



## Tier 4 – Community Containment

Everyone works from home  
No business travel

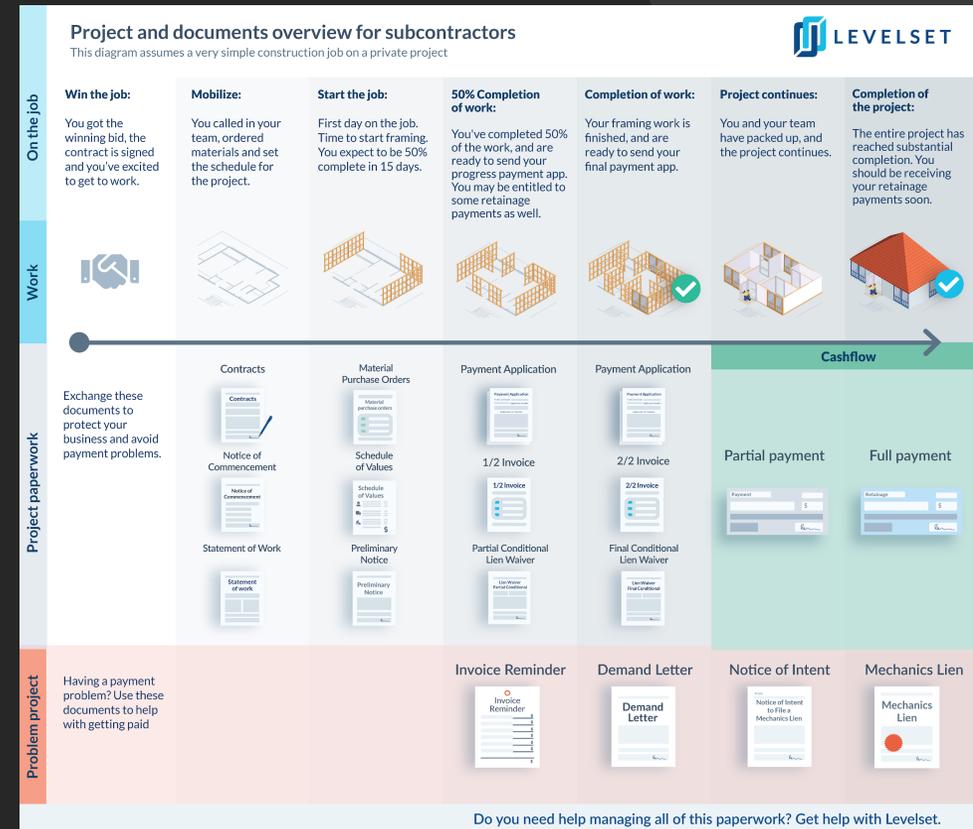
# Project Controls

Everyday you leave  
could be your last for a  
while

# Documentation is critical

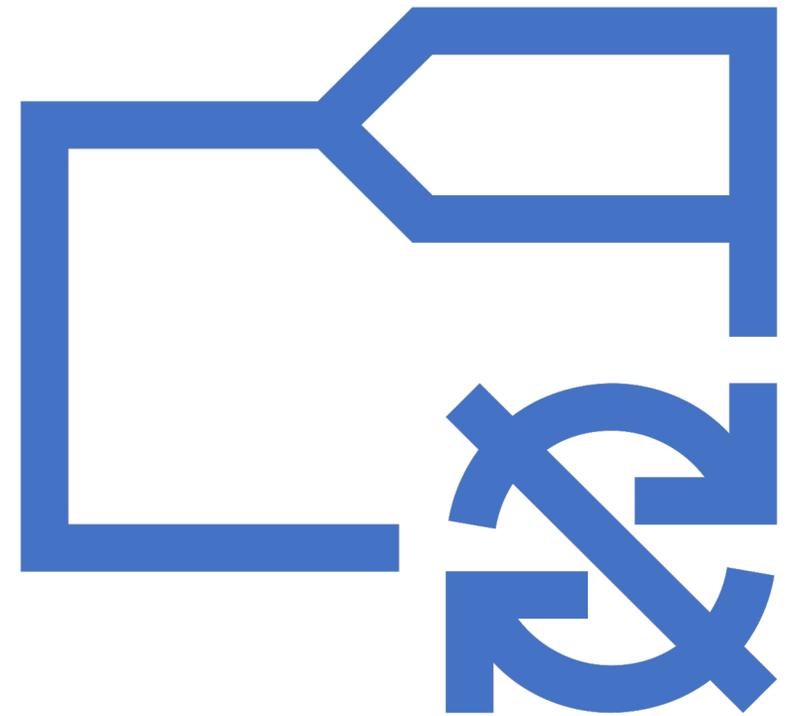
## Project Management Basics

- Document work in place
  - Photos
  - Videos
  - Notes
- Centralized Document Controls
  - RFI
  - Change Orders
- Scheduling
  - Supply Chain
  - Manpower
- Real time Information
- Stored in the Cloud



A Digital Workspace

# Remote Tools



# The Challenges

- Office Communication
  - Face to Face
  - Meetings
  - Email
- Files Stored on Internal Servers
- Legacy Applications

# Office 365



**Teams**



**One Drive**



**Sharepoint**



**Applications**

Excel, Word, PowerPoint  
OneNote, Tasks, To Do  
Planner, Power Automate

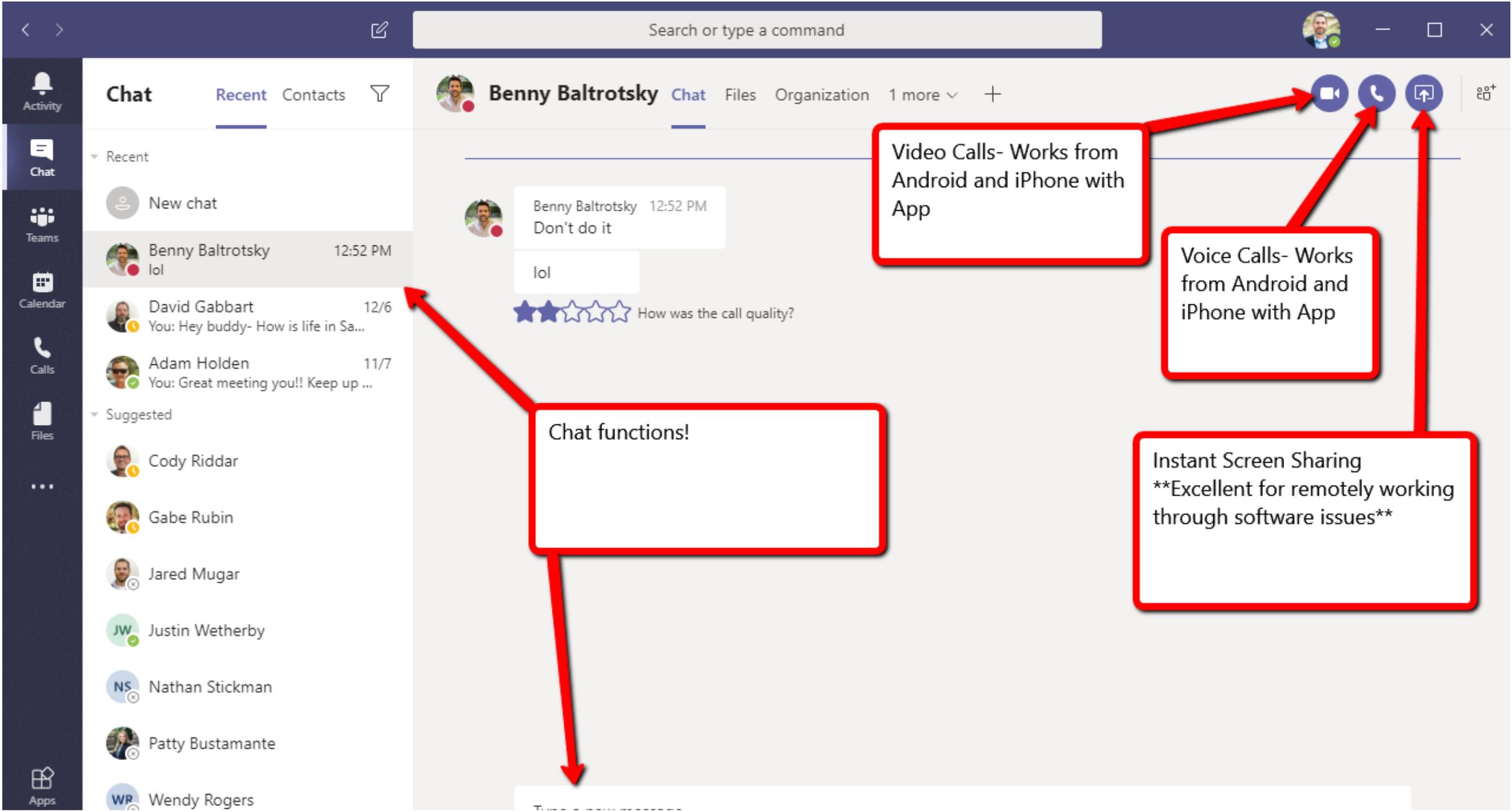
# Portal.Office.com -- Myapps.Microsoft.com

Office 365 All Apps Tips and Tricks Add-Ins →

 <b>Bookings</b> Online appointment scheduling fo...	 <b>Calendar</b> Schedule and share meeting and e...	 <b>Delve</b> Get personal insights and relevant...	 <b>Dynamics 365</b> Break down the silos between you...	 <b>Excel</b> Discover and connect to data, mo...
 <b>Forms</b> Create surveys, quizzes, and polls ...	 <b>Kaizala</b> A simple and secure mobile chat a...	 <b>MyAnalytics</b> Create better work habits with insi...	 <b>OneDrive</b> Store, access, and share your files i...	 <b>OneNote</b> Capture and organize your notes a...
 <b>Outlook</b> Business-class email through a ric...	 <b>People</b> Organize your contact info for all ...	 <b>Planner</b> Create plans, organize and assign ...	 <b>Power Apps</b> Build mobile and web apps with th...	 <b>Power Automate</b> Create workflows between your ap...
 <b>Power BI</b> Create actionable, dynamic, and e...	 <b>PowerPoint</b> Design professional presentations.	 <b>SharePoint</b> Share and manage content, knowl...	 <b>Stream</b> Share videos of classes, meetings, ...	 <b>Sway</b> Create and share interactive repor...
 <b>Tasks</b> Create and manage tasks in Outlo...	 <b>Teams</b> The customizable, chat-based tea...	 <b>To Do</b> Manage, prioritize, and complete t...	 <b>Whiteboard</b> Ideate and collaborate on a freefo...	 <b>Word</b> Bring out your best writing.
 <b>Yammer</b> Connect with coworkers and class...				

# Teams

- Messaging
- Video Chat
- Screen Sharing
- Meetings
- Mobile

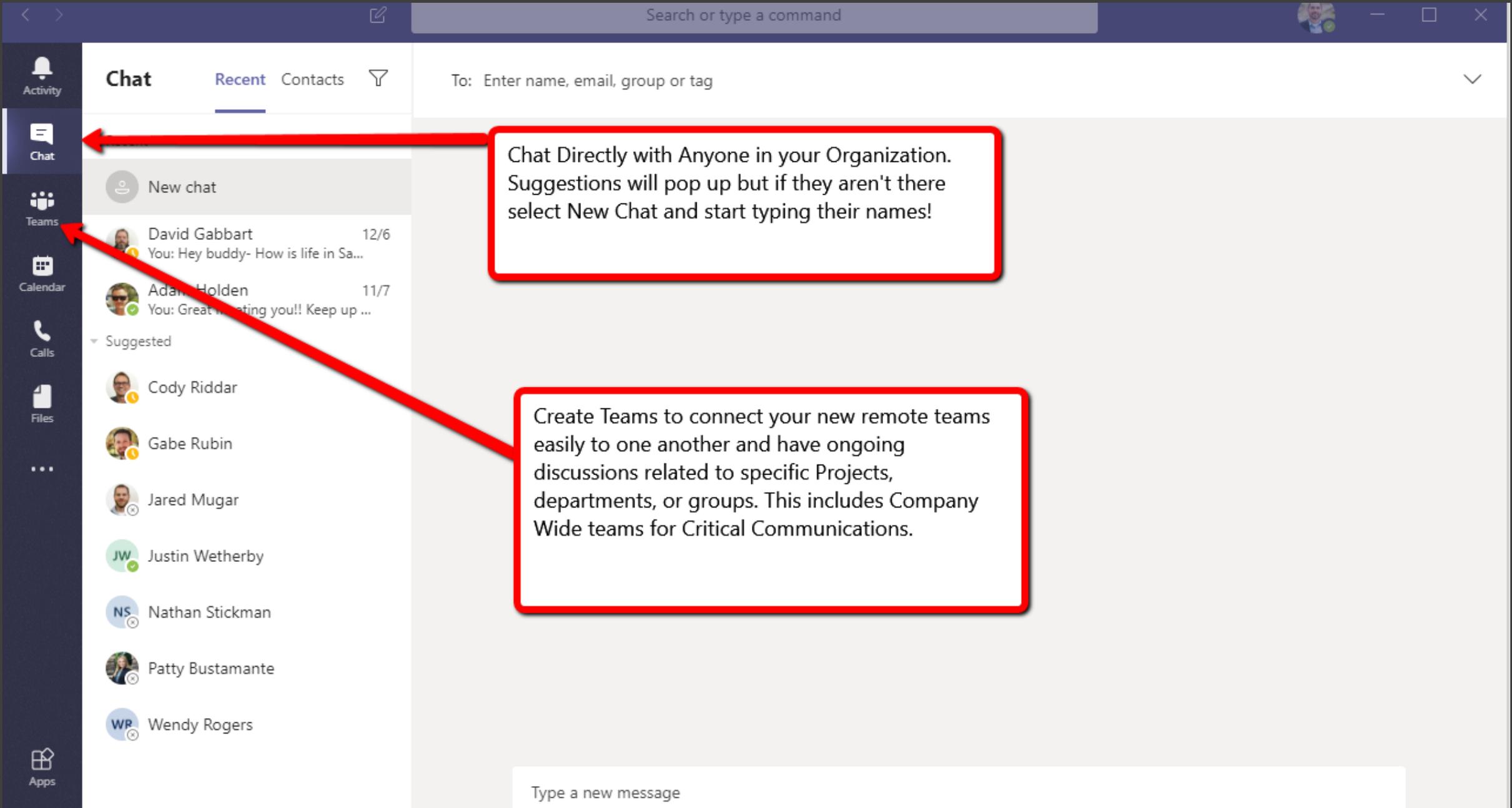


Video Calls- Works from Android and iPhone with App

Voice Calls- Works from Android and iPhone with App

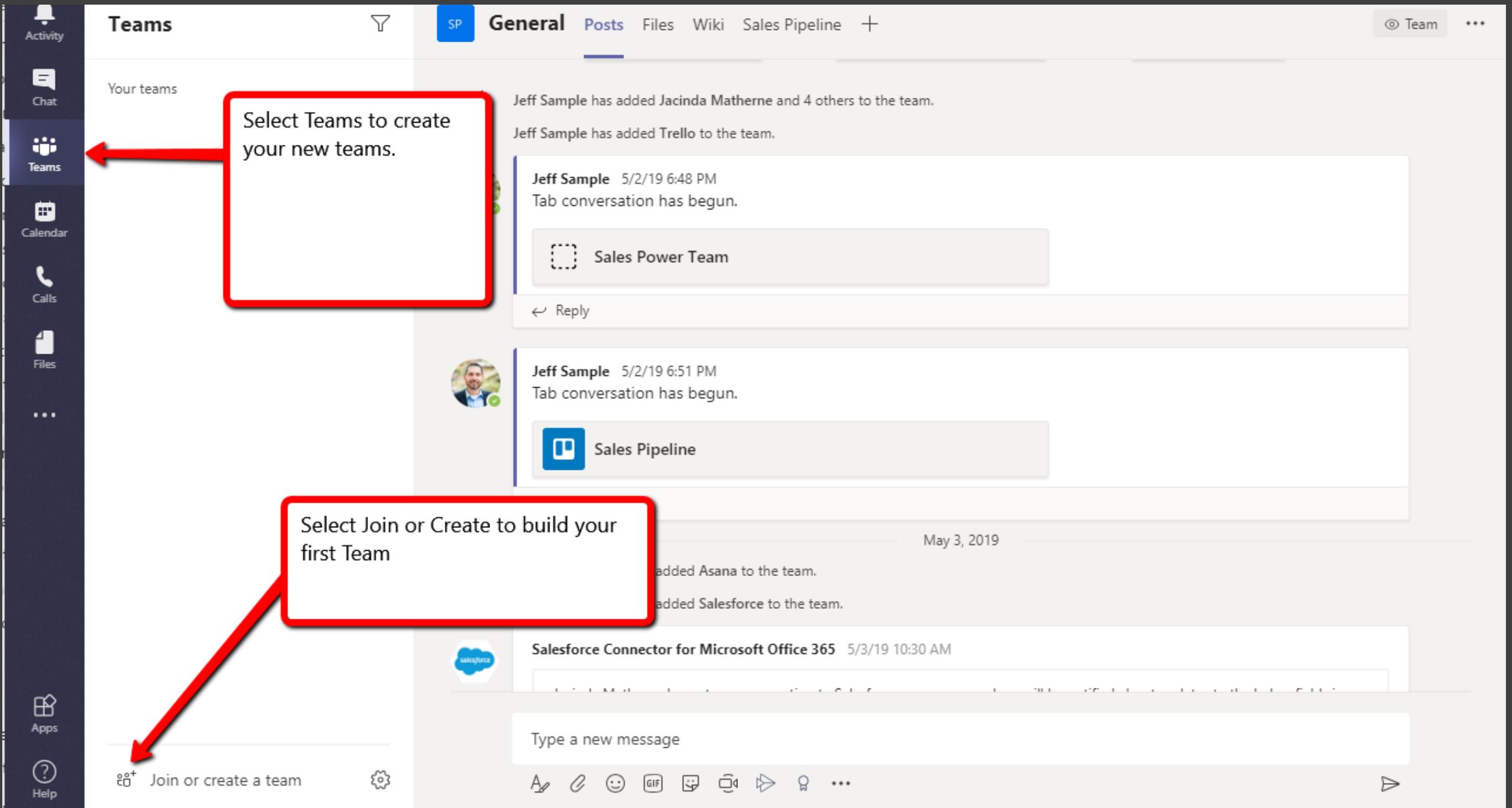
Instant Screen Sharing  
\*\*Excellent for remotely working through software issues\*\*

Chat functions!



Chat Directly with Anyone in your Organization. Suggestions will pop up but if they aren't there select New Chat and start typing their names!

Create Teams to connect your new remote teams easily to one another and have ongoing discussions related to specific Projects, departments, or groups. This includes Company Wide teams for Critical Communications.



Select Teams to create your new teams.

Select Join or Create to build your first Team

- Activity
- Chat
- Teams
- Calendar
- Calls
- Files
- ...
- Apps
- Help

# Teams

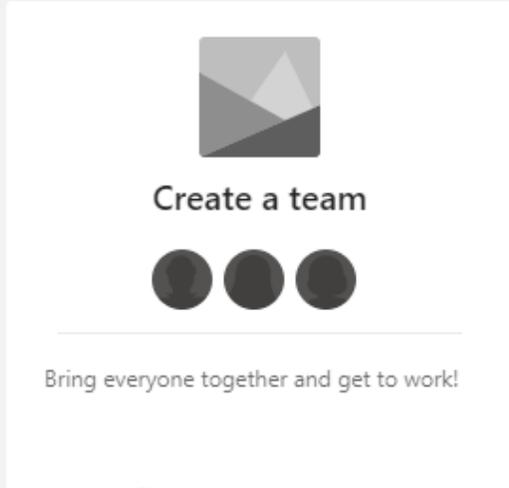


## Join or create a team

Search teams

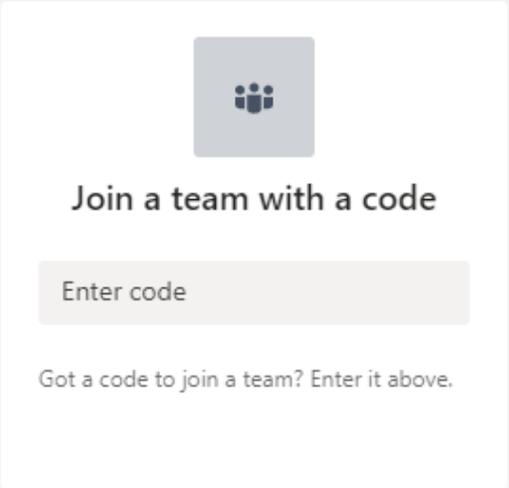


Your teams



**Create a team**

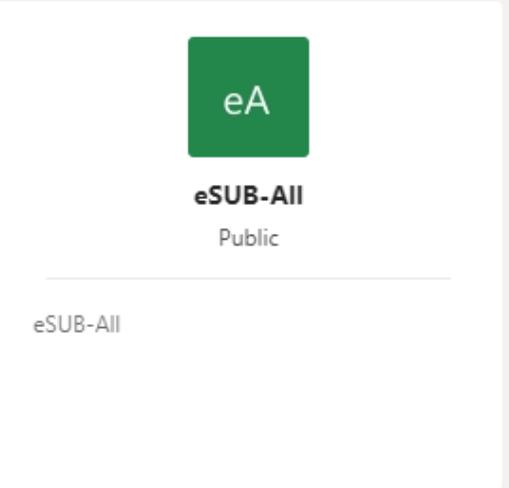
Bring everyone together and get to work!



**Join a team with a code**

Enter code

Got a code to join a team? Enter it above.



**eSUB-All**

Public

eSUB-All

Create your own teams--  
\*\*\*Tutorial Assumes You Selected  
this button\*\*\*

Join another Organizations  
Team--Possibly a GC System

Already created Teams  
you are open to Join

Join or create a team



## What kind of team will this be?



### Private

People need permission to join



### Public

Anyone in your org can join

Self Explanatory

\*\*\*Path of Creating your Own Team  
from Scratch\*\*\*\*\*

< Back

## Create your team



Build a team from scratch

Most People will start here for custom Teams



Create from...

An existing Office 365 group or team

This accesses your Microsoft Domain or Azure AD Groups. Requires advance setup but might exist!

What's a team?

## Some quick details about your private team ×

Team name

**University Hospital Project** ✓

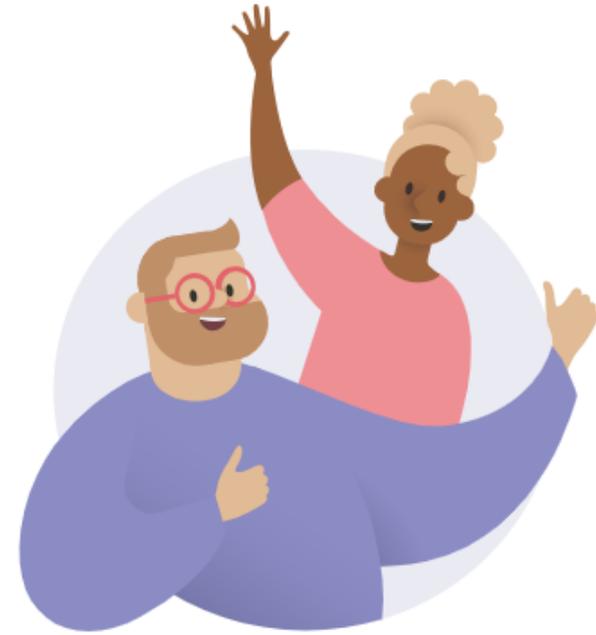
Description

Let people know what this team is all about

Name it, describe  
it, & Create It

[← Back](#)

[Create](#)



**Nice work!**

## Add members to University Hospital Project

Start typing a name, distribution list, or mail enabled security group to add to your team.

Start typing a name or group

Add

Type Names and add members. These can be adjusted later.

Skip

## Add members to University Hospital Project

Start typing a name, distribution list, or mail enabled security group to add to your team.

Start typing a name or group

Add



Benny Baltrotsky  
(BENNY) Chief Strategy Officer

Member



When adding members the privileges can be changed Member or Owner. Owners can add and remove members. This can be changed but having multiple owners will help in getting team members added without delay.

Close

- Activity
- Chat
- Teams
- Calendar
- Calls
- Files
- ...
- Apps
- Help

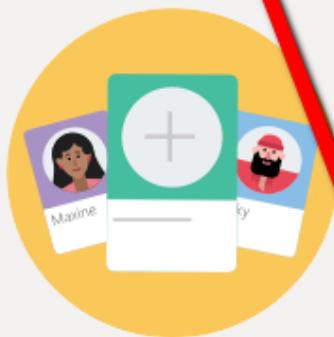
# Teams



Your teams

## Welcome to the team!

Here are some things to get going...



Add more people



Create more channels



Open the FAQ

Jeff Sample has added Benny Baltrosky to the team.

Start talking to the team! Share files (Sharepoint in the background).

Start a new conversation. Type @ to mention someone.



# OneDrive

- Solve Local File “My Documents” issues
- Mobility with Cloud storage
- Mobile Application

Upload your My Documents Folder

Search everything

+ New Upload Sync Flow

Click Sync

### Files

Name	Modified	Modified By	File Size	Sharing	Activity
Bio	June 27, 2019	Jeff Sample	2 items	Private	
Blog	June 10, 2019	Jeff Sample	3 items	Private	
Client	September 27, 2019	Jeff Sample	2 items	Private	
ConTech People	July 2, 2019	Jeff Sample	1 item	Private	
Doug	May 10, 2019	Jeff Sample	2 items	Private	
Expenses	April 26, 2019	Jeff Sample	19 items	Private	
FSA	December 30, 2019	Jeff Sample	5 items	Private	
ILD	May 14, 2019	Jeff Sample	5 items	Private	
MCAA	January 13	Jeff Sample	3 items	Private	
Notebooks	April 23, 2019	Jeff Sample	1 item	Private	
Office Lens	July 11, 2019	Jeff Sample	10 items	Private	
Partner Information	May 2, 2019	Jeff Sample	1 item	Private	
Process Maps Draft	May 30, 2019	Jeff Sample	7 items	Private	
Rocks	January 9	Jeff Sample	9 items	Private	
Sales	December 13, 2019	Jeff Sample	4 items	Private	
Speaking	May 13, 2019	Jeff Sample	7 items	Private	

Get the OneDrive apps

Return to classic OneDrive

← → ↕ ↑ > OneDrive - eSUB Inc > Bio

eSUB Inc

- Consulting - Documents
- NewKirk
- Thought Leadership - Documents
- University Hospital Project - Documents
- OneDrive - eSUB Inc
  - Bio
  - Blog
  - Client
  - ConTech People
  - Doug
  - Expenses
  - FSA
  - ILD
  - MCAA
  - Notebooks
  - Office Lens
  - Partner Information
  - Process Maps Draft
  - Rocks
  - Sales
  - Speaking
  - Training
  - Travel Requests
  - Zoom Recordings

Name	Status	Date modified	Type	Size
eSUB & Ironman BIO.docx		6/27/2019 3:52 PM	Microsoft Word D...	13 KB
JeffSample-Biography-2018.docx		5/13/2019 6:46 AM	Microsoft Word D...	243 KB

This icon signifies it has not been downloaded to the machine. It will do so the first time you attempt to open it. The Cloud will turn to a Check Mark when it has been downloaded. You should open large files the first time on fast networks.

The folders match the folders and files you uploaded

# Sharepoint

- Solve Local File Share Access
- Collaboration for Teams and Departments
- Mobile Application

Start a new Team/  
Project Specific  
Site

### News from sites



#### News from sites

Here you'll see news from sites you follow or visit frequently and other news suggested by the Microsoft Graph.



Outlook Customer Manager

#### New Roadshow Google Map

Jacinda Matherne  
4/3/2019

### Sites

Recent Following Frequent Suggested



Thought Leadership  
Group



Events & Trade Shows  
Group



Outlook Customer Manager  
Group



Consulting  
Group

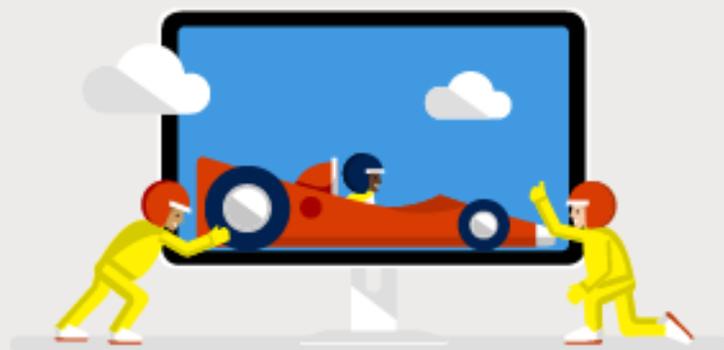


eSUB Inc. Team Site



## Create a site

Choose the type of site you'd like to create.



### Team site

Share documents, have conversations with your team, keep track of events, manage tasks, and more with a site connected to an Office 365 group.

Create a Team Site for your individual teams or projects.  
Example- Estimating Team  
University Hospital Team



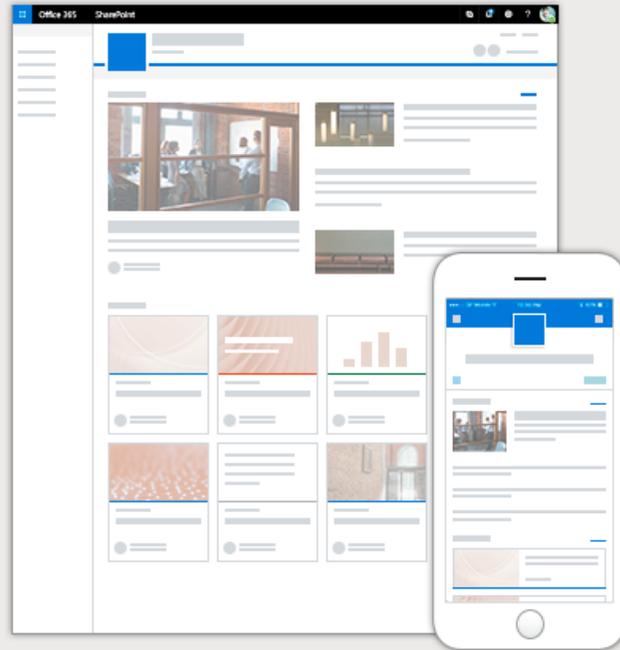
### Communication site

Publish dynamic, beautiful content to people in your organization to keep them informed and engaged on topics, events, or projects.



## Get a team site connected to Office 365 Groups

Use this design to collaborate with your team. Share documents, track events in a shared calendar, and manage project tasks.



Set the site to Public or Private. Mainly used as private access.  
**\*\*Public Groups are great for forms etc.\*\***

Name and describe your site.

### Site name

The site name is available.

### Group email address

Estimating@esub.com

The group alias is available.

### Site address

https://esub.sharepoint.com/sites/Estimating

The site address is available.

### Site description

### Privacy settings

Private - only members can access this site

### Select a language

English

Select the default site language for your site. You can't change this later.

Next

Cancel

## Add group members

Group members will receive an email welcoming them to the new site and Office 365 group

Owners can make the changes necessary for adding members - Always designate multiple owners close to the team to prevent delays in access. Can be adjusted later.



Department Team Members.  
Can be adjusted later

E

Estimating  
Private group

Who do you want to add?

You can also add more people later

Add additional owners

Add members

Finish



# Estimating

Private group

Your new site! Not quite done yet

★ Following

👤 3 members

🔍 Search this site

+ New ⌵ ⚙️ Page details

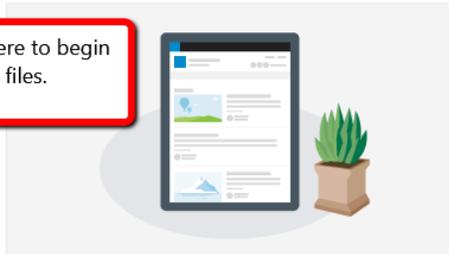
Published [Edit](#)

- Home
- Conversations
- Documents
- Notebook
- Pages
- Site contents
- Recycle bin
- Edit

Click here to begin adding files.

## News

+ Add ⌵



Keep your team updated with news on your team site

From the site home page you'll be able to quickly author a news post – a status update, trip report, or even just h...

[Add News](#)

## Quick links

- 🌐 [Learn about a team site](#)
- 🌐 [Learn how to add a page](#)

## Documents

[See all](#)

+ New ⌵ ... ≡ All Documents ⌵ ⓘ

📄 Name ⌵ Modif



Drag files here

## Activity

The new Estimating group is ready

Welcome to the Estimating group. Use the group to share ideas, files, and important dates. Start a

**Estimating +1**  
Sent 4 minutes ago

**Estimating**

**Jeff Sample**  
Created site 4 minutes ago

View and share files

Collaborate on content with your team.

⬆️ [Upload a document](#)

**Microsoft Teams**  
Communicate with your colleagues in real time by creating a Team for your Office 365 Group. ⓘ  
[Create a Team](#)

[Get the mobile app](#)

Click here to upload files and folders critical to the team. Be thoughtful in how much you need and how much bandwidth you have. Files can be added later.



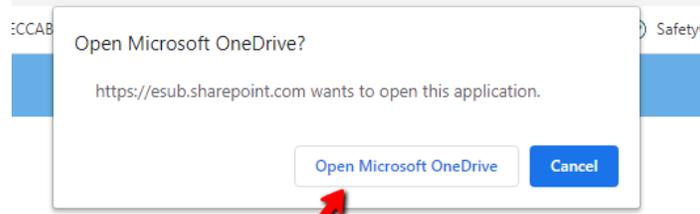
### Documents

Name	Modified	Modified By	+ Add column
------	----------	-------------	--------------

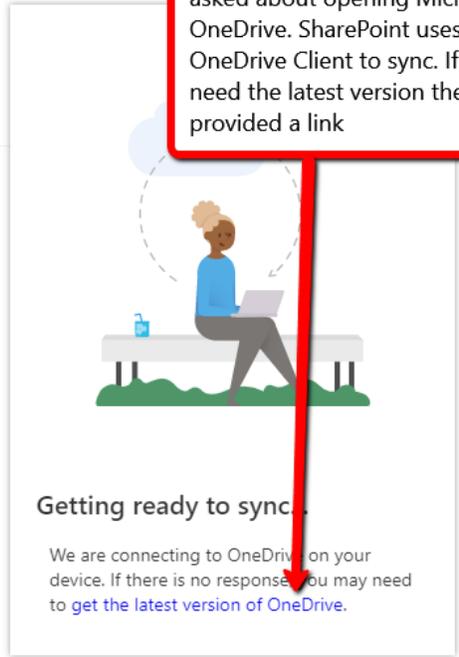
Once the critical files have been uploaded. Access the site from each team members computer and click sync. This will create a copy of the file and folder structure locally on the computer and assist in accessing files through file explorer. This is not the full download of each file. That happens the first time you access the files. **Warning** Certain large files and file types have issues and can present difficulties. Contact support for your software or seek advice for specific file types.

Drag files here

**Microsoft Teams**  
Communicate with your colleagues in real time by creating a Team for your Office 365 Group.  
[Create a Team](#)  
[Return to classic SharePoint](#)



When you click sync you may be asked about opening Microsoft OneDrive. SharePoint uses the OneDrive Client to sync. If you need the latest version they have provided a link



Bids

File Home Share View

eSUB Inc > Estimating - Documents > Bids

Name	Status	Date modified	Type	Size
Document.docx		3/23/2020 6:06 AM	Microsoft Word D...	17 KB

Left sidebar navigation:  
Quick access  
Dropbox  
eSUB Inc  
  Consulting - Documents  
  Estimating - Documents (highlighted)  
    Bids (highlighted)  
  Sales Power Team - Documents  
  Thought Leadership - Documents

The SharePoint folder structure and files are exactly the same as the newly created Company folder in OneDrive Client. Note the Cloud above indicates a file that has not yet been downloaded. It is critical to access large files for the first time from a good internet connection.



# Applications

- Core Productivity – Provide 5 installs per person including Mobile. Also available as online tools
  - Excel
  - Word
  - PowerPoint
- OneNote, Tasks, To Do
- Delve
- Planner, Power Automate – When you take a breath

# GSuite



## Communication Suite

Slack  
Hangouts  
•Chat  
•Meet



## My Drive



## Shared Drives



## Applications Docs, Sheets, Slides, Keep, Apps Script

# GSuite.Google.com

---



EMAIL



HANGOUTS



CALENDAR



GOOGLE+



DRIVE



DOCS



SHEETS



FORMS



SLIDES



SITES



ADMIN



eDISCOVERY

My Drive offers folder structure on line, Quick Access for regularly accessed files, and the power of Google's search functions. Don't forget to turn on notifications for critical files!

New

My Drive

Quick Access

My Drive

- Board Survey
- President
- Rocketbook

- Shared with me
- Recent
- Starred
- Trash

Storage  
377.3 MB of 15 GB used  
[Buy storage](#)

**Board Self-Evaluation**

RESPONSIBILITY 1: Determine the School's Mission and Purpose

ECCA Board Self-Evaluation - CDE...  
You edited in the past year

2.13.20Board Meeting Feedback ...  
You uploaded in the past month

**Eagle County Charter Academy**

2020.03.12 Agenda.docx  
You uploaded in the past month

Name	Owner	Last modified	File size
Rocketbook	me	Dec 2, 2018	—
President	me	Oct 11, 2018	—
Board Survey	me	Dec 10, 2019	—
Resolution_Accept_Auditors.pdf	me	Jun 2, 2019	7 KB
Getting started	me	Aug 29, 2018	1 MB
ECCA Board Res Proposed Buds	me	Jun 2, 2019	86 KB
		Jun 2, 2019	22 KB

Get notifications on your computer for shared files and important events. **TURN ON**

GSuite.Google.com

- All remote No Installation required
- Android & iPhone apps free

# Hangouts

- Messaging
- Video Calls
- Meetings
- Screensharing
- Mobile



New conversation

Start a new Conversation  
from your contacts.



No recent chats  
[Start a new one](#)

# Hi, Jeff!

Get started by calling or messaging a friend below.



VIDEO CALL



PHONE CALL



MESSAGE

Everything at your finger tips for phone, video, and  
messaging.



Photo by Brian Matiash

# Slack

- Messaging
- Video Calls
- Meetings
- Screensharing
- Mobile

Slack | company\_announcements | eSUB

**eSUB** ▾  
Jeff Sample

Jump to... < >

Threads  
Apps

Starred

- # esub911
- # sales-team
- Angelina Hendricks
- Benny Baltrotsky
- Ed Coffin
- Jenny Clavero
- Matt Belkin
- Wendy Rogers

Shared Channels

- # company\_announce...
- # esub-all
- # esub-random

Channels

- # autodesk-university
- # bigrockpodcast
- # competition
- 🔒 covid19toolkit
- # enterpriseteam
- # general

**#company\_announcements** ◀▶  
☆ 👤 67 | 🔒 0 | eSUB Engr is in this chan... | Official company announceme...

Search

@angelina created this channel on March 9th. This is the very beginning of the #company\_announcements channel. Description: Official Company Announcements

Add an app Add people

Monday, March 9th

Angelina Hendricks 3:35 PM  
joined #company\_announcements.

Angelina Hendricks 3:36 PM  
changed channel posting permissions.

Wendy Rogers 3:37 PM  
was added to #company\_announcements by Angelina Hendricks, along with 4 others.

Slackbot 4:57 PM  
This channel's now shared between eSUB and eSUB Engr. It works just like any other channel, except better – because here, there are two teams working together.

Brian Crouch 5:01 PM  
was added to #company\_announcements by Angelina Hendricks, along with 31 others. Also, David Gabbart and 19 others joined.

eSUB Engr is in this channel

Message #company\_announcements

B I 🔒 🔗 📄 📄 📄 📄 📄 Aa @ 😊

Shared Channels for critical company communication and for creation of Team communications.

The screenshot shows a Slack window titled "Slack | Samantha Jandrich | eSUB". The interface is split into three main sections: a left sidebar, a top header for the current chat, and a main message area.

- Left Sidebar:** Shows the workspace "eSUB" with a list of channels and direct messages. A red arrow points to the "Direct Messages" section, which includes a plus sign icon in the top right corner.
- Top Header:** Displays the name "Samantha Jandrich" and a search bar. A red arrow points to a phone icon in the top right corner.
- Main Message Area:** Shows a conversation history. A red box highlights a "Call Ended" notification: "Call Ended Friday, March 20th Ended at 4:15 PM - Lasted 13 minutes". Below it, a message says "You both joined".

Three red callout boxes provide additional information:

- Top Right Callout:** "When you are in a direct message you can call that person or the entire group by clicking the phone button. To share screens you must first be on a call with them." (Points to the phone icon)
- Direct Messages Callout:** "Direct Message or start a new chat. These can be one to one or you can create groups on the fly. When you click the plus a Window opens to add members. (see next slide)" (Points to the plus icon in the Direct Messages list)
- Bottom Callout:** "Slack is great for external communications and groups. See the list on the left of the other Slack Groups you have joined. Access them directly from here. Notice the white circle in the corner signifying activity in the group." (Points to the Direct Messages list)

At the bottom, there is a message input field with the placeholder text "Message Samantha Jandrich" and a rich text editor toolbar.

Direct Message or start a new chat. These can be one to one or you can create groups on the fly. When you click the plus a Window opens to add members. (see next slide)

When you are in a direct message you can call that person or the entire group by clicking the phone button. To share screens you must first be on a call with them.

Slack is great for external communications and groups. See the list on the left of the other Slack Groups you have joined. Access them directly from here. Notice the white circle in the corner signifying activity in the group.

## Direct Messages



Samantha Jandrisch ✕



Brianna Maczko ✕

Go

You can add 6 more people



Looking for someone but can't remember their name? Switch to search to find people based on title, profile info, or topics they talk about. [Search for people](#)

### Recent conversations



Wendy Rogers ○

3 days ago



Benny Baltrosky ○ BennyB

3 days ago



Jenny Clavero ○ Jenny Clavero

3 days ago



David Gabbart □

3 days ago



Outlook Calendar ● APP

3 days ago

Type names in the window and select them from below to start individual or group chats. It will learn and recommend your frequent contacts.

# DIRECT MESSAGE SLACK CALL

## From a direct message

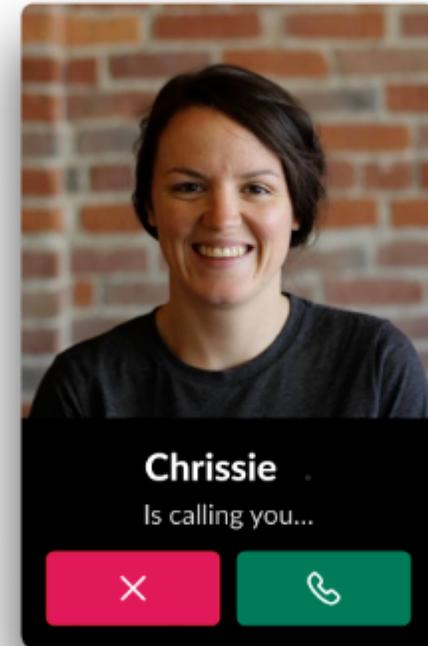
- 1 Open a direct message.
- 2 Click the 📞 **phone icon** at the top right.
- 3 Your call will start right away, and the member you're calling will receive a pop-up notification.

You can also click the 📷 **camera icon** to start a video call and [share your screen](#) if your workspace is on a paid plan.



**Note:** If using [Do Not Disturb](#), the member you're calling will see a missed call notification in a direct message.

When another member calls you in a one-to-one or group DM, you'll see a pop-up call notification. Click the green 📞 **phone icon** to answer the call.



# CHANNEL SLACK CALL

## From a channel

- 1 Open a channel and click the 📞 **phone icon** at the top right.
- 2 Your call will post to the channel and any member (up to 15 total) can join by clicking **Join this call**.

You can also click the 📷 **camera icon** to start a video call and [share your screen](#) if your workspace is on a paid plan.

When you start a call in a channel with more than 100 members, Slack will confirm this is the action you want to perform before the call starts.

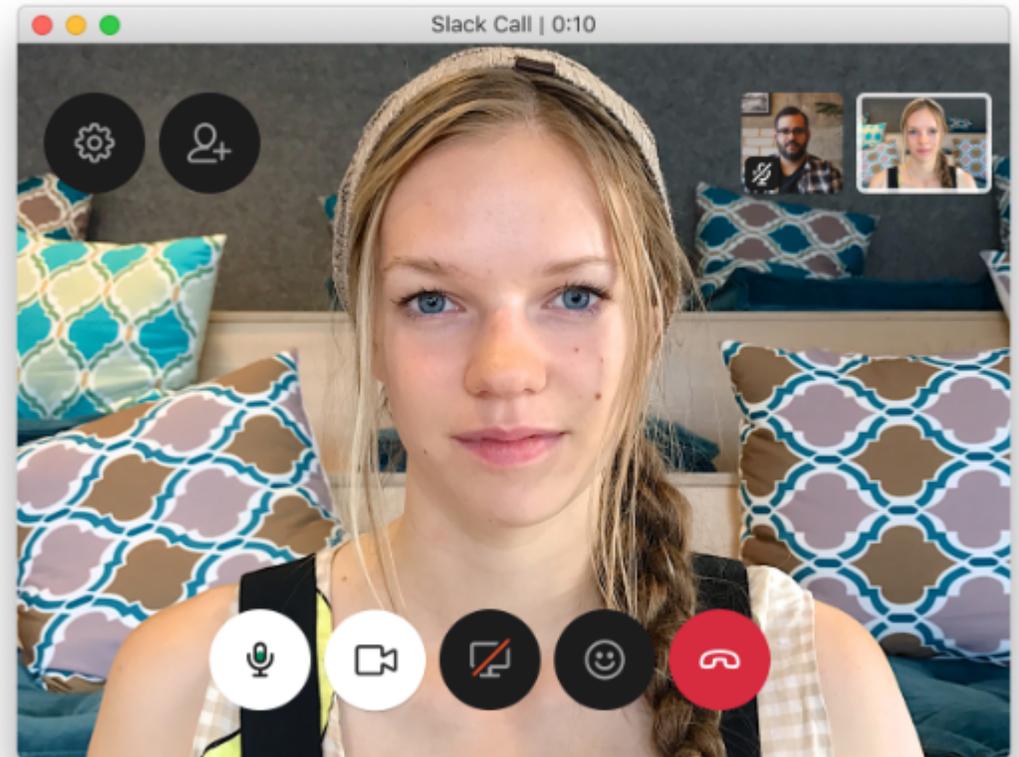


**Tip:** Use an [@here](#) or [@channel mention](#) to notify channel members before or after you start the call.



**Note:** Need a shortcut for making calls? We've got a slash command for that! Use `/call` in a DM or channel to start a call.

Click **Join this call** from the in-channel invitation. A call window will open where you can see who else is on the call, and who is speaking.



# INVITING TO A SLACK CALL/SCREEN DRAWING

---

## Invite other members to a call

To invite a specific member to join your current call, follow these steps:

- 1 Click the  **invite icon** in the upper-right corner of the call window.
- 2 Start typing a member's name to filter the list.
- 3 Select a member to invite.

---

If you'd like to share a call in other channels, here's how:

- 1 Click the  **invite icon** in the upper-right corner of the call window.
- 2 Click **Share this call**.
- 3 Click **Copy link**.
- 4 Post the call link to a channel.

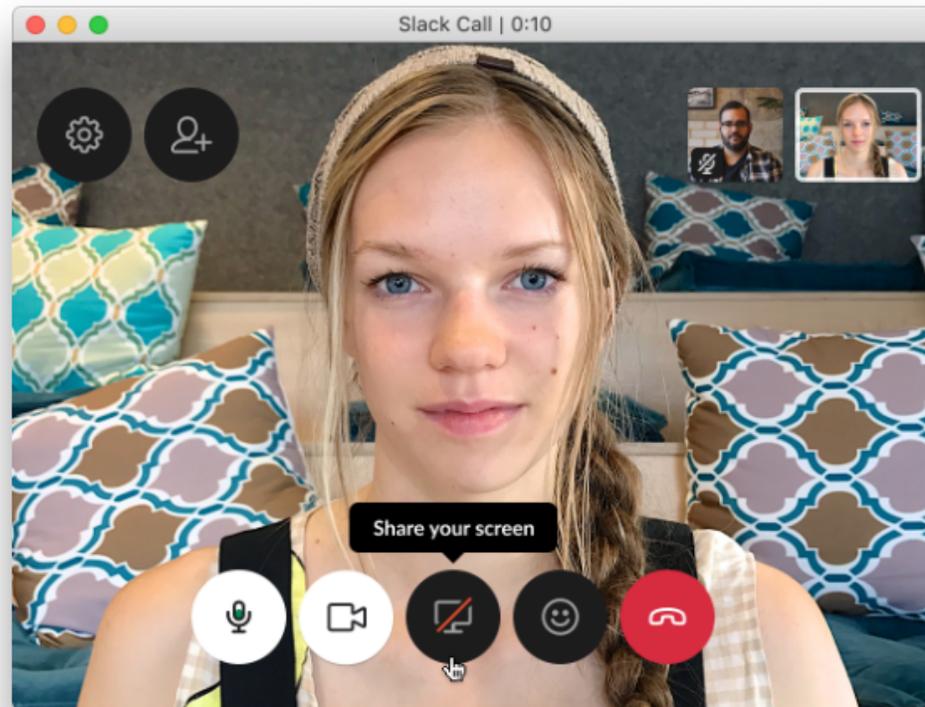
## Allow others to draw on your screen

By default, your teammates can draw on your screen while you're presenting. To turn this off, click the  **group drawing** icon. You can also draw on your screen by clicking the  **pencil** icon. Use this tool to draw attention to specific sentences, charts, data points, or whatever else is important to call out.

# SCREEN PRESENTATION IN SLACK

## Present your screen

During a call, any participant can present their screen by clicking the  **Share your screen icon**.



# Legacy Application Access



Remote Desktop



Virtual Desktop Infrastructure  
(VDI)



Microsoft Azure

Paper is the  
enemy

- Bluebeam
- Adobe
- Dropbox for Business

Jeff Sample

eSUB Construction Software

jeffs@esub.com

eSUB.com

@IronmanofIT

@eSUBConstructionSoftware



**Q & A**

**Thank You**

# Extra Resources

# Links and Resources

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- [eSUB COVID Preparedness Kit](#)
- [CDC COVID-19 Information](#)
- [CDC Guidance for Businesses](#)
- [OSHA 3990 Guidance on Preparing Workplaces for COVID-19](#)
- [Worldwide Health Organization \(WHO\) – COVID-19 Information](#)
- [Coronavirus COVID-19 Global Cases Map/Count - John Hopkins University](#)
- [Employment Law COVID-19 FAQ \(Wilmer Hale\)](#)

# Communication Plan

Examples for  
Redistribution

# COVID19 Facts

---

- 13,000 US Cases
- All 50 States confirm positive cases
- Virus transmitted through droplets
- Transmitted through people without symptoms for 14 days
- Expect high levels of infection through middle of May & through the summer

**The virus is more patient than people**

# COVID -19 Timeline

## – A Case Study

---

- Wed 3/4 – CEO participated in national high-level executive briefing
- Thurs 3/5/20 – CEO debriefed internal management to establish short terms policies
- Thurs EOD – Employee survey “Occasional Work from Home” issued company wide
- Fri 3/6/20 – Employee feedback refined go forward policies
- Mon 3/9/20 – All Hands – Intro to Thurs. company wide “Work From Home” Day
- Tues/Wed 3/10-3/11 – WFH training workshops
- Thurs 3/12– Company wide WFH
- Fri 3/13 – Extended WFH Indefinitely – Pick up items to “Optimize” productivity
- Mon 3/16 – Last day to pick up items from office prior to closure

# Employee Operations

---

- Work remote whenever possible
- States are beginning to forbid onsite operations
- At a minimum employees need to remain 6ft apart
- Restrict access to employees only when remote work is not possible
  - No vendors
  - No family
  - Etc.
- When outside access is required follow these questions
  - Do you have symptoms of respiratory illness?
  - Do you have reason to believe you've been exposed to COVID19?
  - Have you been abroad in the last 14 days?

# In Office Guidelines

---

- Laptops and essential equipment should be taken home daily
  - Essential equipment examples – power supplies, headsets for heavy phone users
- Observe proper hygiene
  - Wash hands often with soap and water for at least 20 seconds
  - If soap and water are not available use an alcohol-based hand sanitizer (60%+)
  - Avoid touching eyes, nose, and mouth
  - Sneeze and cough into a tissue or your elbow
  - Dispose of used tissues, paper towels appropriately
  - Disinfect frequently used surfaces daily
  - Dishes eliminated from office – move to paper and plastic
- Switch from handshakes to the elbow or foot bump
- Work remote
- Provide prepackaged individual meals
- Prepare for 25% of workers to be unavailable

# When NOT to come into the Office/Jobsite

---

- Fever at or above 100°F / 37.8°C
- Respiratory symptoms – difficulty breathing
- Severe productive cough not due to a long-standing medical issue
- Shortness of breath
- Exposure to someone who has been exposed to COVID – 19
- Exposure to someone who has recently returned from international travel

# Travel Policy Changes

---

- No business travel to high-risk areas (CDC defined areas as areas 2 or 3 <https://www.cdc.gov/coronavirus/2019-ncov/travelers/index.html>)
- Only essential business travel permitted
- All travel must be approved by CEO
- If the employee or someone they live with has travelled to a high-risk area, the employee should self-quarantine at home for 14 days
- Countries closing borders
- Travel is not the problem it is the destination
- The US Government cannot guarantee return from abroad
- No current Domestic travel Bans
- Critical business travelers suggest 14-day quarantine

# Supply Chain Disruption

---

- Plan for and prepare for Supply chain disruption
  - Inventory current supplies
  - Contact Vendors to secure information on availability of supplies in the US
- People who transport and frequently interact with people and surfaces are likely to become ill
- Ports implementing tighter restrictions on overseas goods
- Have a backup plan for local alternative sources or fabrication where possible

# 4 Phases of Government Action

---

- **Phase 1** Already Enacted
  - Provides direct aid to people fighting the spread of the virus
  - Contact Vendors to secure information on availability of supplies in the US
- **Phase 2** in effect as of 3/20/2020
  - Free COVID19 testing even if insurance does not cover it
  - Basic Subsistence Aid for individuals who cannot cover the cost of necessities'
  - FAMILY LEAVE: Private sector employers with fewer than 500 workers have to provide as many as 12 weeks of job-protected leave under the Family and Medical Leave Act (FMLA) for qualifying employees
  - SICK LEAVE: If a full time employee is sick with COVID-19 or a family member has it and they are all under mandatory quarantine, they are required to get: 80 hours of sick leave, with part time workers receiving paid leave equivalent to their normal work schedule (someone averages 10 hours of work a week has to get 10 hours a week paid leave). Employees must be paid their full wage during that time.
  - To help employers pay for these family and sick leave programs, the government is giving employers a credit against the payroll tax
- **Phase 3** of government action will include broader economic measures to bail out hard hit industries and provide support for continued business operations. It is speculative at this point and likely to change in the coming weeks as a result of partisan divisions and resulting negotiations, but Congress is aiming to pass legislation by April 1st.
- **Phase 4** will come at a later date when the federal government likely realizes that all of the above has not done enough to support economic recovery. It is harder to predict what this relief might look like at this stage.

# Economic Reality

---

- This is a Financial Crisis not an economic crisis.
- Credit is still flowing.
- Markets, though down, are functioning and many businesses are reporting favorable reactions to loan and rent forbearance.
- If this gets long or bad enough, that could change, but for now everyone seems to want to assist each other in getting through this pandemic.

# Social Reality

---

- Extended School Closures are a reality. Likely the remainder of the year.
- Ecommerce emerging as the clear winner.
  - With forced retail closures, consumers are being driven to online purchasing.
  - As consumers become comfortable with online purchasing, Brick & Mortar retail will continue to undergo disruption.
- Remote work practices is likely to have an impact on the practicality of large office spaces.
- Video conferencing abilities are likely to impact business travel policies and the travel industry.
- The global pandemic will have a positive impact on general hygiene, emergency preparedness, and public health measures driving new business innovation opportunities.

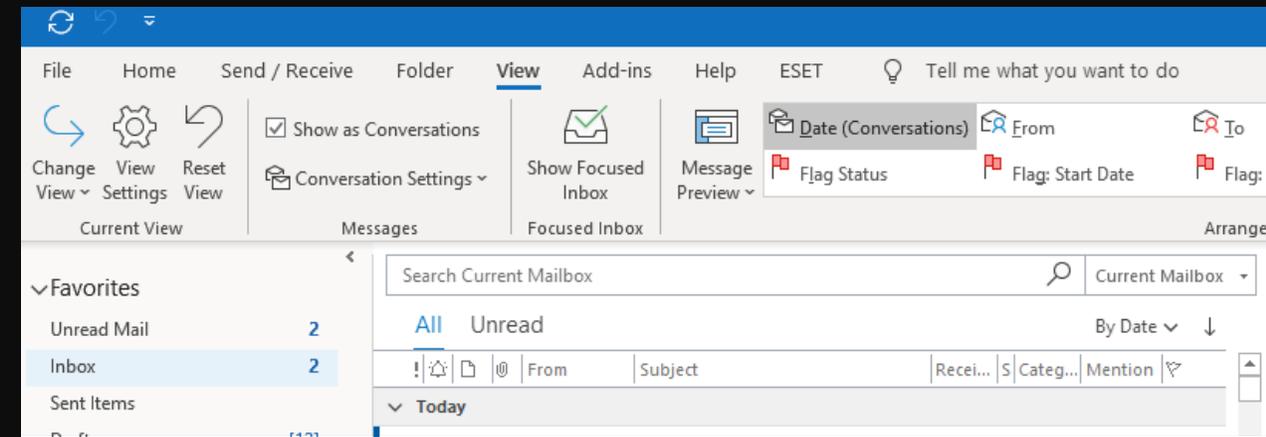
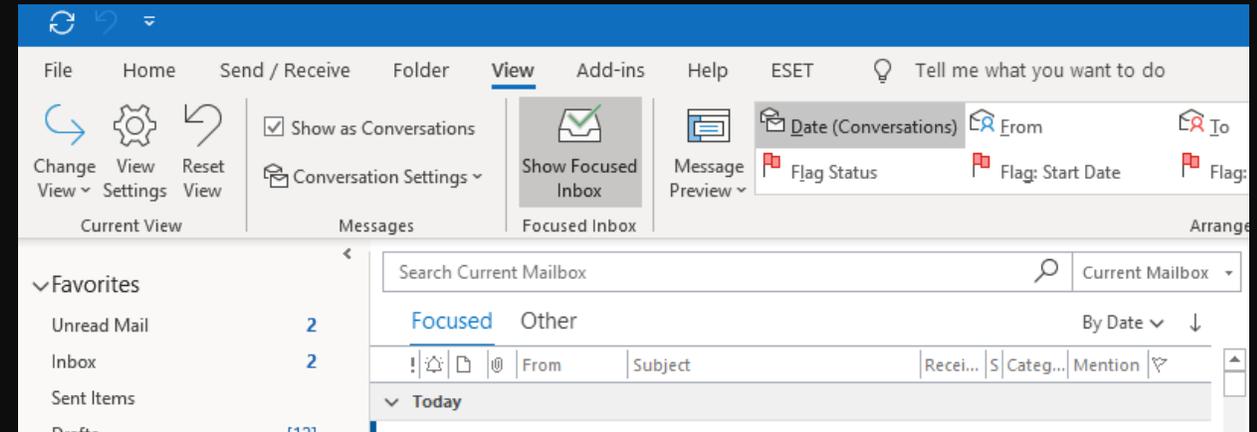
# Outlook

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Basics

# OUTLOOK BASICS – INBOX FEATURES

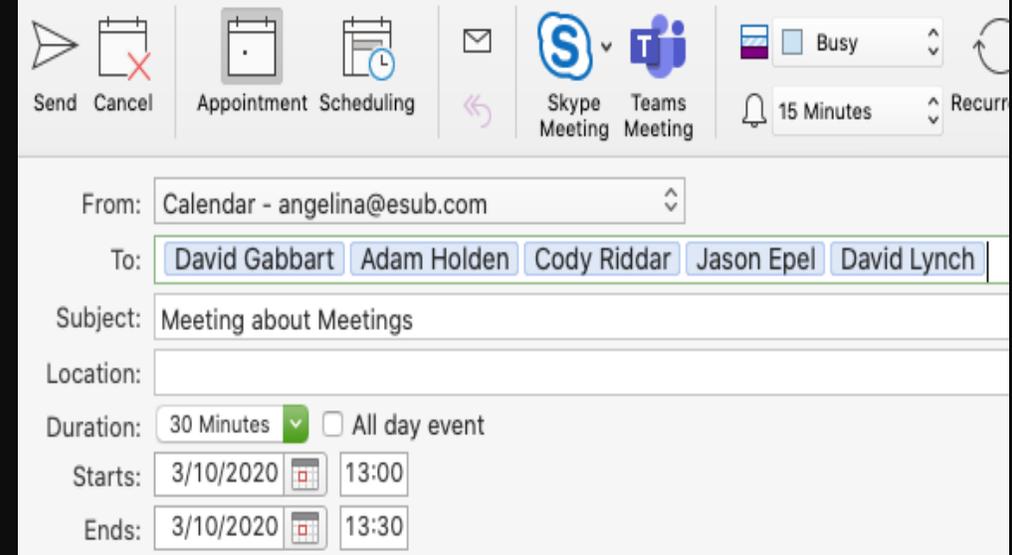
- Focused vs. Standard
  - Focused Inbox separates your Inbox and adds the emails you open frequently to your Focused inbox
  - All other email goes into the Other inbox
  - To disable Focused Inbox go into View in Outlook and turn off Focused Inbox
- Junk Mail
- Rules



# OUTLOOK BASICS – MEETING SCHEDULING

- Create a meeting
- Add attendees
- Determine when everyone is free
- Book a conference room

Top skinny bar shows when all attendees are free or scroll up and down to see each person's availability



Send Cancel Appointment Scheduling Skype Meeting Teams Meeting 15 Minutes Recurr

From: Calendar - angelina@esub.com

To: David Gabbart Adam Holden Cody Riddar Jason Epel David Lynch

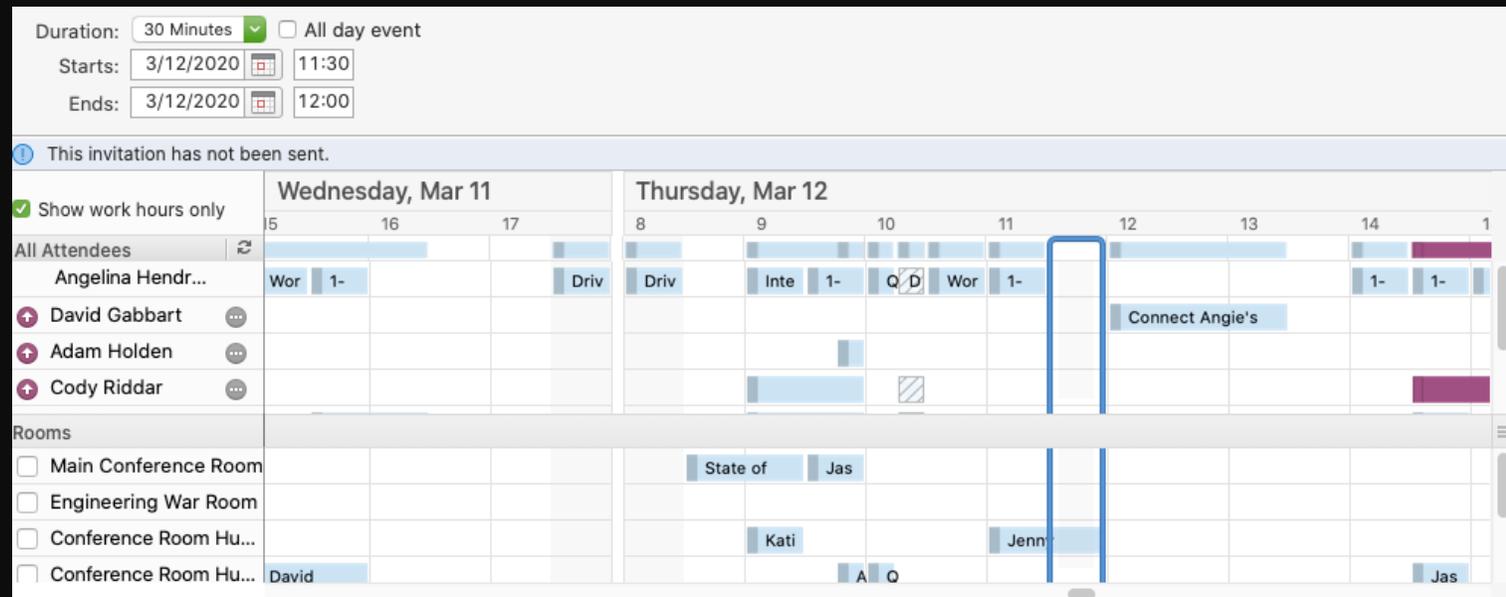
Subject: Meeting about Meetings

Location:

Duration: 30 Minutes  All day event

Starts: 3/10/2020 13:00

Ends: 3/10/2020 13:30



Duration: 30 Minutes  All day event

Starts: 3/12/2020 11:30

Ends: 3/12/2020 12:00

This invitation has not been sent.

Wednesday, Mar 11 Thursday, Mar 12

Show work hours only

All Attendees

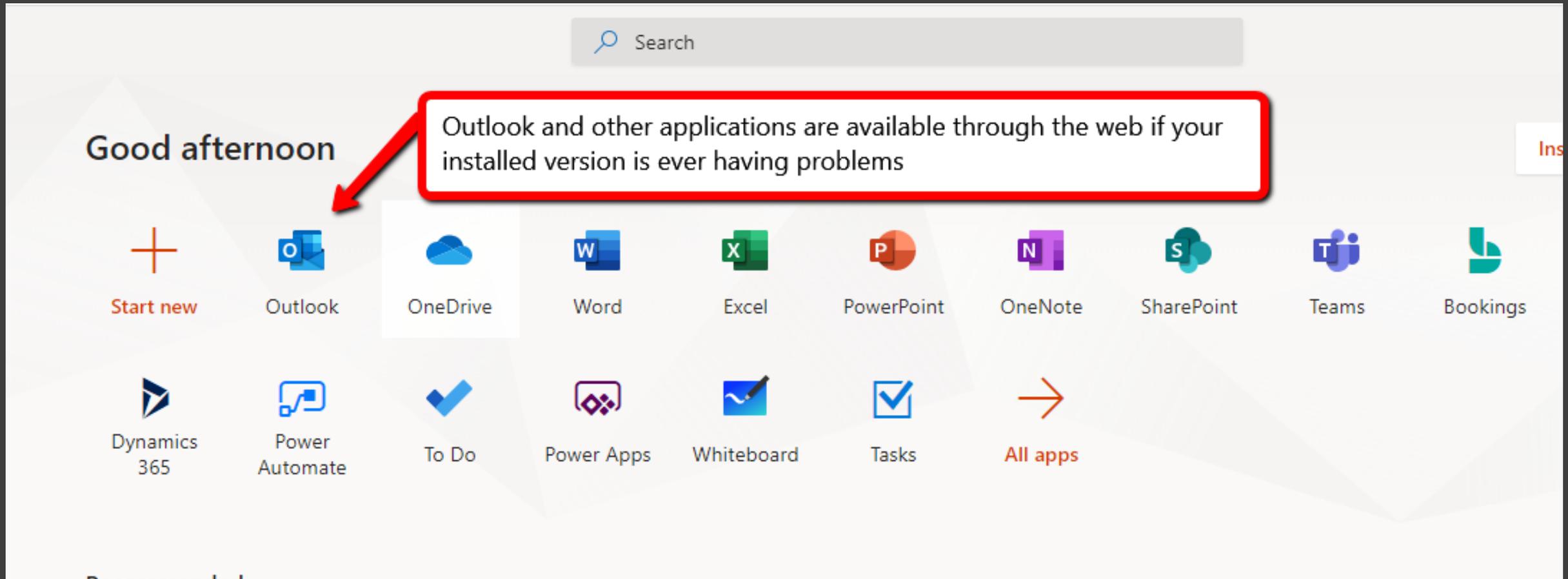
Attendee	Wed 11	Thu 12
Angelina Hendr...	Wor 1- Driv	Driv Inte 1- Q D Wor 1- Connect Angie's
David Gabbart		
Adam Holden		
Cody Riddar		

Rooms

Room	Wed 11	Thu 12
Main Conference Room		State of Jas
Engineering War Room		
Conference Room Hu...		Kati Jenn
Conference Room Hu...	David	A Q Jas

MYAPPS.MICROSOFT.COM

- If classic Outlook fails to function you can access your email using the Outlook App in your myapps portal
- This is where you will also find your other apps including all SSO'd (single sign-on) apps

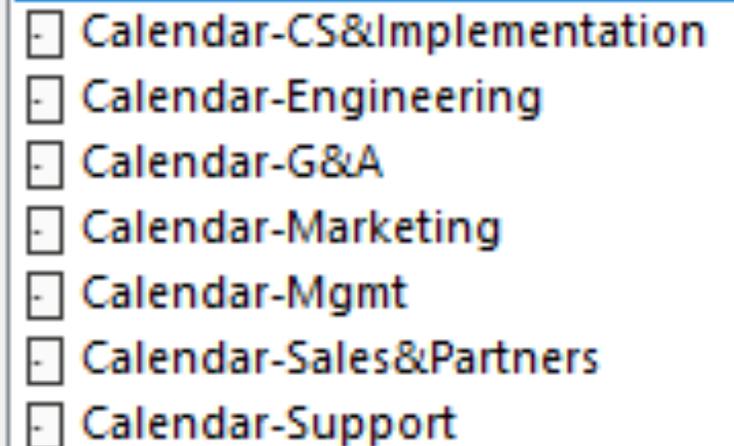


# TEAM CALENDARS

---

# TEAM CALENDAR PROCESS

- Create a meeting on your personal calendar and add the Team Calendar from the room list in the address book (Mac Outlook only need to add as a required attendee) -- this is just like how you book a meeting room
- Add all needed information in the Subject (do not include your name) line and Details section of the meeting
- Send the meeting and you will receive an acceptance response from the Team calendar
- The calendar will automatically add your name in front of the subject
- Details of your meeting are only visible on your personal calendar
- When to add an event to the Team Calendar? Whenever you are working from a different location than normal such as:
  - You usually work in the SD office but are working from home today
  - You usually work from your home office in Timbuktu but are in the SD office today
  - You are attending a trade show
  - You are on a business trip
  - You are taking a sick day
  - You are vacationing in Bora Bora

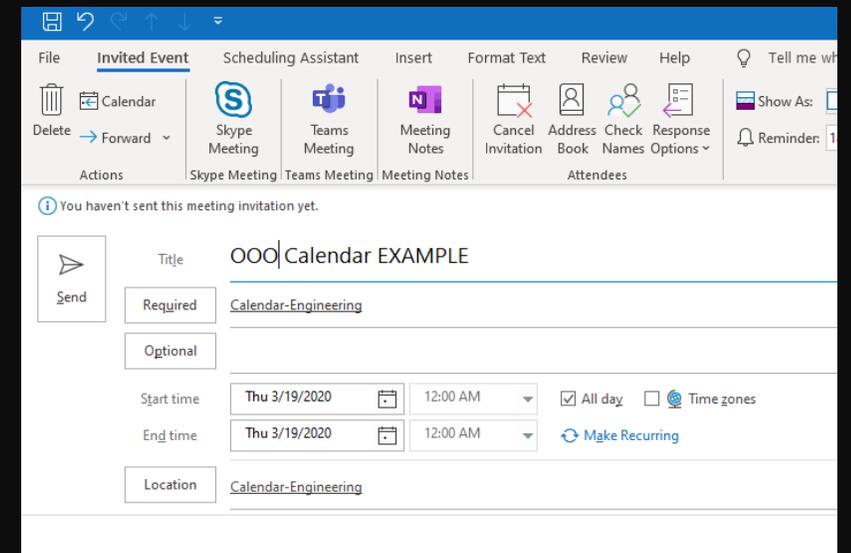
- 
- A screenshot of a software interface showing a list of calendar options. Each option is preceded by a small square icon with a minus sign inside. The list includes: Calendar-CS&Implementation, Calendar-Engineering, Calendar-G&A, Calendar-Marketing, Calendar-Mgmt, Calendar-Sales&Partners, and Calendar-Support.
- Calendar-CS&Implementation
  - Calendar-Engineering
  - Calendar-G&A
  - Calendar-Marketing
  - Calendar-Mgmt
  - Calendar-Sales&Partners
  - Calendar-Support

# TEAM CALENDARS

The screenshot displays the Microsoft Outlook calendar interface. On the left, a navigation pane shows a list of calendars under 'My Calendars', 'Team: Angelina Hendricks', and 'Shared Calendars'. The 'Rooms' section is expanded, listing several calendars with checkboxes: Calendar-Engineering, Calendar-CS&Implementation, Calendar-G&A, Calendar-Marketing, Calendar-Mgmt, Calendar-Sales&Partners, and Calendar-Support. The main window shows a calendar view for December 11, 2019, with a detailed weekly view for December 2-6, 2019 (Week 49). The weekly view shows various events such as 'Weekly Conference', 'Integration Next', '1-on-1', 'Work', 'Share', 'Coffee with La', 'Wome', 'Discuss', 'IT', and '1-on-1'. The interface includes a top navigation bar with 'Home', 'Organize', and 'Tools' tabs, and a search bar at the top right. The status bar at the bottom indicates 'Items: 83' and 'Connected to: angelina@esub.com'.

# ADDING EVENTS TO THE TEAM CALENDARS

- To add an event to a Team calendar you schedule it the same way reserve a conference room by adding the Team calendar as a location to your meeting from your calendar meeting setup, which then also adds the Team calendar as a required attendee, and then click Send
- Make sure you receive an Accepted message from the Team Calendar as this is confirmation you have setup the Team event correctly
- All Team Calendars are visible to everyone



# GOTOMEETING

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VIDEO CALLS, MEETINGS, SCREENSHARING

# GO TO MEETING BASICS

---

- **You're invited**
- The invitation email or message will include a link to the meeting
- The invitation will also include instructions for using the phone or your computer's mic and speakers (VoIP) for audio
- **Be prepared**
- Join the meeting a few minutes early to make sure you have everything you need
- If you don't already have the software, it will download automatically, and you'll be placed into the meeting
- **Join the meeting**
- Click your online meeting link, or go to [gotomeeting.com](https://gotomeeting.com) and enter the meeting ID
- If your host requires one, be sure to have the meeting password handy

# GO TO MEETING BASICS CONT.

---

- **Talk and listen**
- Check the online meeting invitation or your Control Panel to see the audio options available
- If the option to dial-in is offered and you'd like to use it, call in using the telephone number and access code shown. Enter the audio PIN if provided
- You can also use your computer's mic and speakers (VoIP). For the best experience, we recommend using a USB headset with this option
- **Know who's speaking**
- The bottom of your meeting window and the Control Panel both indicate who's speaking
- When you are speaking, meeting attendees will see your name if you connected with mic and speakers or if you dialed in and entered your **audio PIN**

# GO TO MEETING BASICS CONT.

---

## ➤ Interact

- You can mute yourself when you're not speaking. The host can also mute you or all attendees. If you dialed in using a phone, you'll need to use the audio PIN to mute your line via the GoToMeeting controls
- The easiest way to share your webcam is to click the button on the grab tab. Or you can click the Share My Webcam button on the Control Panel
- Pause and resume your webcam by using the icons in the top-right corner of your webcam feed
- If you are muted or don't want to interrupt the speaker, you can use the chat feature to communicate with the group, the host and/or other individual attendees
- The host can make you the presenter or give you control of the shared screen. When you're the presenter, additional controls will appear on your grab tab

# GO TO MEETING BASICS CONT.

---

- **Leave the meeting**
- When you're ready to leave a meeting, click the icon at the top of the meeting window (You'll be prompted to confirm that you want to leave)

# Project Controls

Everyday you leave  
could be your last for a  
while

# Documentation is critical

## Project Management Basics

- Document work in place
  - Photos
  - Videos
  - Notes
- Centralized Document Controls
  - RFI
  - Change Orders
- Scheduling
  - Supply Chain
  - Manpower
- Real time Information
- Stored in the Cloud

The screenshot displays the eSUB Projects dashboard. At the top, there is a search bar for projects and several filter options: 'Number 1', 'Filter by Status', 'Filter by Division', and 'Filter by Market Area'. The main content area lists six projects, each with an 'OPEN' status indicator, a project name, a project manager, and a division. Each project entry includes a progress bar showing 'Est. Hours' and 'Actual' hours. The first project, '1-2017- ELECT100 - Minute Maid Park (Demo)', has an estimated 6,341 hours and 4,116 actual hours. The second project, '12345 - Vail Springs- Mech Upgrades', has 0 estimated and 0 actual hours. The third project, '2019-101-T - As Planned Hours Example', has 710 estimated and 968 actual hours. The fourth project, '2019-11-8 - Test 1901 Mech', has 200 estimated and 8 actual hours. The fifth project, '2019-John - John's T&M', has 0 estimated and 4 actual hours. The sixth project, '2020-1-15 - Electrical Upgrades- Sheppard Center', has 0 estimated and 0 actual hours. The dashboard also features a 'Start' button, a user profile for 'Jeff Sample', and a 'Help' button in the bottom right corner.

Project Name	Project Manager	Division	Est. Hours	Actual Hours
1-2017- ELECT100 - Minute Maid Park (Demo)	Ed Coffin	DIV001 - Electrical / 2.0 - Commercial- New	6,341	4,116
12345 - Vail Springs- Mech Upgrades	Not Assigned	DIV001 - Electrical / 2.0 - Commercial- New	0	0
2019-101-T - As Planned Hours Example	Not Assigned	DIV001 - Electrical / 2.0 - Commercial- New	710	968
2019-11-8 - Test 1901 Mech	Not Assigned	DIV001 - Electrical / 1.0 - Waste Water Treatment	200	8
2019-John - John's T&M	Not Assigned	DIV001 - Electrical / 6.0 - Service/T&M	0	4
2020-1-15 - Electrical Upgrades- Sheppard Center	Not Assigned	DIV001 - Electrical / 3.0 - Commercial- Renovation	0	0

## Cloud-based project management and document control software

Share documents and data between the office and the field in real time

Designed specifically for subcontractor document workflows

Communicate, share and track project documents in a single location

Automated workflows eliminating tedious paperwork





### 1. Photo Taken in Field



### 2. Notes & Keywords #Change Order



### 3. Office Generates Docs



# Document Controls

- <https://www.support.esub.com/hc/en-us/articles/207302858-Create-Request-for-Information-RFI->

Request For Information Log								
<span>SEARCH</span> RFI Number: <input type="text"/> RFI Subject or Answer To Clarification: <input type="text"/> Status: <span>All</span>								
ACTION	RFI Number	GC/CM No	GC File No	Owner No	RFI Date	Return By	Date RFI Returned	Status
		RFI Subject						
		Answer To Clarification						
	54				2/20/2018	2/28/2018	4 Days Left	Pending Pending
		Flood damage to main electrical room						
	53				2/12/2018	2/17/2018	7 Days Late	Pending Pending
		Need clarification regarding Switchboard AA metering						
	52				2/8/2018	2/13/2018	11 Days Late	Pending Pending
		Clarification of Exit light in rm 101						
	51				1/30/2018	2/4/2018	20 Days Late	Pending Pending
		Damage to equipment						

# Submittal Log

SEARCH Sub No:  Trans No:  Rel No:  Text:  S/RT Type: All Status: All

ACTION	Sub No	Trans No	Rel No	Send To	Spec Section No	Reason For Sending	Copy To	Date Sent	Return By	Returned On	Custom Text	Custom Numbers	Custom Dates	Status			
				Subject													
				PO No	Notes												
				Line Items <span style="float: right;">expand all</span>													
	1	1	0	Turner Construction	23 30 00	For Approval		1/26/2015	2/2/2015	01/26/2015	PO 1234			Sent			
				Added diffusers for electric rooms.													
				Any submittal notes can be entered here.													
	2	2	0	Turner Construction		For Approval		1/26/2015	1/28/2015	01/30/2015 2 days late				Revise and Resubmit			
				EXAMPLE - Returned and Late													
				+ 2 Line Items <a href="#">(click to expand)</a>													
				Turner Construction		For Approval		1/26/2015	2/11/2015	01/28/2015				Pending			

# Collaborative Submittal Log

<https://www.support.esub.com/hc/en-us/articles/207178687-Create-Submittals-Transmittals->

## Change Order Request Log

Excel®

Print | Print Multiple

SEARCH

COR No:

Text:

Status: Approved ▼

Work Type: All ▼

Search results for

ACTION	COR Number	Other Reference No	GC COR / RFI No	CURRENT STATUS	Labor Hours	Labor Cost	Equipment Cost	Material Cost	Subcontractor Cost	Overhead Cost	Cost	Cost	Other and Small Tools Cost	Total Cost	Amount Quoted	Amount Approved	Markup %
		COR Subject							Issue Thread							Lines	
		COR Date	Action Date		Comments / Time Extension Request												
		Original Contract Amounts		—	7,285.00	\$25,500.00	\$0.00	\$336,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$361,500.00	\$1,244,500.00	\$1,244,500.00	244%
	93		1 (Rev 0)-	A	2.00	\$100.00	\$0.00	\$10.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$110.00	\$247.25	\$175.00	59%
		Fan Upgrade							RFI: 150 (Rev 0)-5/22/2019-							2	
		12/4/2019	2/6/2020														
	91	1234	2444	A	200.00	\$7,000.00	\$0.00	\$719.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,719.00	\$17,290.90	\$17,290.00	98%
		New Switch							RFI: 203, Other Reference No: 1234							5	
		10/2/2019	11/4/2019														

# Change Order Tracking

<https://www.support.esub.com/hc/en-us/articles/206474688-Create-new-Change-Order-Request>

### Incoming Emails for Number: 15 (Revision 0)

ACTION	Number	From	Preview	Date
 	10360  	Benny Baltrotsky	RE: Palos Community Hospital project Submittal No: 01-243-CS-15 - See attached for update. From: Benny Baltrotsky Sent: Monday, March 9, 2020 9:31 PM To: Benny	3/9 9:32 pm

### Sent Emails for Number: 15 (Revision 0)

ACTION	Number	Who	Preview	Date
	30485 	Benny Baltrotsky , Benny@esub.com, benny@esub.com	Palos Community Hospital project Submittal No: 01-243-CS-15 - You have received a Submittal. To view see atta	3/9 9:29 pm
	30466 	Benny Baltrotsky , esubtrial@gmail.com, benny@esub.com	Palos Community Hospital project Submittal No: 01-243-CS-15 - You have received a Submittal. To view see atta	12/4/2019 10:47 am

DOCUMENT  
SPECIFIC EMAIL  
TRACKING

- <https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration>

# CENTRALIZED PROJECT INBOX

Project Inbox						Excel®	Printer
SEARCH						Subject / Body: <input type="text"/>	Sender / Recipient: <input type="text"/>
ACTION	Number	From	Preview	Date			
  	10294	  Benny Baltrotsky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-96 (Rev 0) - From: Benny Baltrotsky Sent:	4/25/2018			
  	10287	 Benny Baltrotsky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-95 (Rev 0) - What is this From: Benny Baltrotsky	4/1/2018			
  	10285	  Benny Baltrotsky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-95 (Rev 0) - See attached for update From: Benny	3/30/2018			
  	10284	  Benny Baltrotsky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-94 (Rev 0) - See attached for update From: Benny	2/26/2018			
  	10279	  Benny Baltrotsky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-91 (Rev 0) - See attached for update From: Benny	2/7/2018			
  	10246	  Benny Baltrotsky	RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-85 (Rev 0) - See attached From: Benny Baltrotsky	9/27/2017			

<https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration>