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
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**
- 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 2 – Abundance of Caution**
- 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 3 – Minimize Exposure**
- 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
Remote Tools

A Digital Workspace
The Challenges

• Office Communication
  • Face to Face
  • Meetings
  • Email
• Files Stored on Internal Servers
• Legacy Applications
Office 365

- **Teams**
- **One Drive**
- **Sharepoint**
  - Excel, Word, PowerPoint
  - OneNote, Tasks, To Do
  - Planner, Power Automate
- **Applications**
Teams

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

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 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
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
What kind of team will this be?

- **Private**
  - People need permission to join

- **Public**
  - Anyone in your org can join

---

Create your team

- **Build a team from scratch**
- **Create from...**
  - An existing Office 365 group or team

---

Most People will start here for custom Teams

Self Explanatory

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

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

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.

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.
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 Beltrotsky 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
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
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.

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

Create a Team Site for your individual teams or projects. Example: Estimating Team, University Hospital Team.
Name and describe your site.

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

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

Add additional owners
Enter a name or email address

Add members
Enter a name or email address

Finish
Your new site! Not quite done yet.

Click here to begin adding files.
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.

Once the critical files have been uploaded, access the site from each team member's 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 file. **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.
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.
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
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!
GSuite.Google.com

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

• Messaging
• Video Calls
• Meetings
• Screensharing
• Mobile
Start a new Conversation from your contacts.
Slack

- Messaging
- Video Calls
- Meetings
- Screensharing
- Mobile
Shared Channels for critical company communication and for creation of Team communications.
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 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.
Direct Messages

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 Baltrotsky • BennyB • 3 days ago
Jenny Clavero • Jenny Clavero • 3 days ago
David Gabbart • 3 days ago

Outlook Calendar • APP •
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.

Chrissie
Is calling you...
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. Copy 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

- 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 oversees 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 COVID-19 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

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.
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.

Outlook and other applications are available through the web if your installed version is ever having problems.
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.
TEAM CALENDARS
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

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 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
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
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

Photo Stored in eSUB
1/10/20 11:23 AM

2. Notes & Keywords #Change Order

Field note attached to RFI
1/10/20 11:24 AM

3. Office Generates Docs

Field note answered by office
1/10/20 11:30 AM

https://www.support.esub.com/hc/en-us/articles/208014607-Field-Notes
### Document Controls


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- Flood damage to main electrical room
- Need clarification regarding Switchboard AA metering
- Clarification of Exit light in rm 101
- Damage to equipment
Collaborative Submittal Log

https://www.support.esub.com/hc/en-us/articles/207178687-Create-Submittals-Transmittals-
Change Order Tracking

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

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<td>Benny Baltrotsky, <a href="mailto:Benny@esub.com">Benny@esub.com</a>, <a href="mailto:benny@esub.com">benny@esub.com</a></td>
<td>Palos Community Hospital project Submittal No: 01-243-CS-15 - You have received a Submittal. To view see atta</td>
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<td>Palos Community Hospital project Submittal No: 01-243-CS-15 - You have received a Submittal. To view see atta</td>
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**DOCUMENT SPECIFIC EMAIL TRACKING**

- [https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration](https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration)
# CENTRALIZED PROJECT INBOX

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<td>10279</td>
<td>Benny Baltrotsky</td>
<td>RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-91 (Rev 0) - See attached for update From: Benny 2/7/2018</td>
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<td>10246</td>
<td>Benny Baltrotsky</td>
<td>RE: Henry B. Gonzalez Convention Center project RFI No: 1-243-CS-85 (Rev 0) - See attached From: Benny Baltrotsky 9/27/2017</td>
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</table>

[https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration](https://www.support.esub.com/hc/en-us/articles/206474648-Email-Integration)