Specifications Extraction – Quick Guide

| CMiC ECM Explorer | | _ 🗆 🗡 |
|---|---|-------|
| Menu | Document Data Extraction | |
| Upload Plans with Sync Change Copy Favorite Login Set | 1. Select Project | |
| My Files CMiC Server | (0808) 0808 | |
| ∩ My Files | (08081)08081 | |
| 🔄 My Computer | (0822)0822 | |
| Selected Directory | (190513) 10 Hanna Ave | - |
| None | | |
| Search | 2. Enter Details | Q |
| ▶ Desktop | Uocument Type Specifications (Beta) | |
| | | |
| ▷ H:\ | Revision Date 2//09/2019 [15] Revision no. 0 | |
| ▷ EX | Received Date 27/09/2019 15 | |
| \.\.\.\.\.\.\.\.\.\.\.\.\.\.\.\.\.\.\. | -3 Select Document(c) | |
| ▷ K\ ▷ L\ | 4. Select Extraction regions | |
| ▶ M :\ | Drag and drop files or click to browse Proceed | |
| ▶ O:\ | | |
| Name Modified On Created By Size | Do not include nested folders | |
| | 5. Submittals Extraction | |
| | Extract Submittals from Part-1, Extract Submittals from Part-2. | |
| | where the word 'Submittal' is referred All Sub-Sections will be extracted | |
| | Disable Automatic Drawing Set Packaging Cancel | |
| | | |

The specifications extraction feature in CMiC ECM Explorer extracts specification details from a project manual/specifications book to automatically generate a submittal log in CMiC

Field. In CMiC ECM Explorer, click on the Data Extraction icon (

ment Data Extraction pop-up window. See the <u>Overview – Document Data Extraction</u> section in this guide for further details.

Once a project has been selected, set the Document Type field to "Specifications (Beta)" to perform a specifications extraction.

Performing a Specifications Extraction

Step 1: Preparing a Specifications Document for Extraction

| 2.5 | MORTAR AND GROUT MATERIALS |
|-------|---|
| А. | Portland Cement-Lime Mix: Packaged blend of portland cement and hydrated lime containing no other ingredients. |
| B. | Mortar Pigments: Natural and synthetic iron oxides and chromium oxides, compounded for use in mortar mixes and complying with ASTM C 979/C 979M. Use only pigments with a record of satisfactory performance in masonry mortar. |
| | Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following: |
| | a. Davis Colors. b. Euclid Chemical Company (The); an RPM company. c. Lanxess Corporation. d. Solomon Colors, Inc. |
| C. | Aggregate for Mortar: ASTM C 144. |
| | For mortar that is exposed to view, use washed aggregate consisting of natural sand or crushed stone. For initial handles 1/4 inch thick was apprended with 100 groups to provide the |
| | For joints less than 1/4-inch thick, use aggregate graded with 100 percent passing the No. 16 sieve. |
| | White-Mortar Aggregates: Natural white sand or crushed white stone. Colored-Mortar Aggregates: Natural sand or crushed stone of color necessary to produce required mortar color. |
| D. | Cold-Weather Admixture: Nonchloride, noncorrosive, accelerating admixture complying with ASTM C 494/C 494M, Type C, and recommended by manufacturer for use in masonry mortar of composition indicated. |
| | Manufacturers: Subject to compliance with requirements, available manufacturers offering products that may be incorporated into the Work include, but are not limited to the following: |
| | a. BASF Corp Construction Chemicals. |
| | c. GCP Applied Technologies Inc. (formerly Grace Construction Products). |
| E. | Water: Potable. |
| 2.6 | REINFORCEMENT |
| А. | Uncoated Steel Reinforcing Bars: ASTM A 615/A 615M or ASTM A 996/A 996M, Grade 60. |
| B. | Reinforcing Bar Positioners: Wire units designed to fit into mortar bed joints spanning masonry unit cells and to hold reinforcing bars in center of cells. Units are formed from 0.148-inch steel wire, hot-dip galvanized after fabrication. Provide units designed for number of bars indicated. |
| | |
| CONCR | RETE UNIT MASONRY 042200 - 6 |
| | |

Sample of a specifications document

Prepare a PDF file of the specifications document. This is the document from which specification details will be extracted to generate a submittals log. As shown in the above screenshot, the "Concrete Unit Masonry" on the bottom left of the page is the specification section, the "2.5 Mortar and Grout Materials" is the sub-specification section, and the "Portland Cement-Lime Mix" is the submittal. Each bullet point under the specification section will be uploaded as a submittal during the specifications extraction process.

NOTE: Ensure a colon is placed after the submittal name (as shown in the above screenshot) to separate it from the description during the specifications extraction process.

Step 2: Document Data Extraction

| CMIC ECM Explorer | | × |
|---|---|----|
| Menu | Document Data Extraction $-	imes$ | |
| Upload Plans Change Copy Favorite Login Set | 1. Select Project | |
| My Files CMiC Server | (0808) 0808 | |
| ∩ My Files | (08081)08081 | |
| My Computer | (0822) 0822 | : |
| Selected Directory: | (190513) 10 Hanna Ave | - |
| None | | |
| Search | 2. Enter Details Document Type Specifications (Beta) | ٩, |
| b C | Version Name | |
| ▷ G\ | Revision Date 27/09/2019 - Revision no 0 | |
| ▶ H:\ | | |
| ▶ EV | Received Date 27/09/2019 [15] | |
| /:L ⊲ | | |
| ▷ K:\ | 3. Select Document(s) 4. Select Extraction Regions | |
| | | |
| | Drag and drop files or click to browse Proceed | |
| | | |
| Name Modified On Created By Size | Do not include nested folders | |
| | 5. Submittals Extraction | |
| | Extract Submittals from Part-1, Extract Submittals from Part-2. | |
| | where the word 'Submittal' is referred All Sub-Sections will be extracted | |
| | Disable Automatic Drawing Set Packaging Cancel | |
| | | |

In CMiC ECM Explorer, click on the Data Extraction icon () to open the Document Data Extraction pop-up window. After selecting a project in the Select Project section, change the Document Type field in the Enter Details section to "Specifications (Beta)", as shown in the above screenshot.

The Submittals Extraction section will then appear on the bottom of the window with two toggles, Extract Submittals From Part-1 and Extract Submittals From Part-2. By default,

Extract Submittals From Part-2 toggle is enabled and the Extract Submittals From Part-1 toggle will be disabled.

In the Select Document(s) section, the user can drag and drop files into the region if Windows Explorer is already open, or click it to open the Windows Explorer window, where they can browse and select files.

Click the [**Proceed**] button under the Select Extraction Region section once a specification document has been selected.

| Doc | ument Data Extraction | | - 🗆 × |
|-----|---|---|---|
| | O | | $\epsilon_{\downarrow}^{\dagger} \oplus \oplus \oplus \langle 1 \text{ of } 24 \rangle \rangle$ |
| | | | |
| | Oraw a rectangle that measures the distance between the start of the section and first bullet point. | CHILDRENS THERAPY PLACE CTP | ŕ |
| | | SECTION 042200 - CONCRETE UNIT MASONRY | |
| | | PART I - GENERAL | |
| | Watch training video Process | LL RELATED DOCUMENTS A. Drawings and general provisions of the Contract, including General and Supplementary Conditions and Division 01 Specification Sections, apply to this Section. | |
| | | 1.2 SUMMARY | |
| | | A. Section Includes: | |
| • | | Concrete masonry units. Decontrive concrete masonry units. Pre-faced concrete masonry units. Mortar and grout. Steel creinforcing bars. Masonry-joint reinforcement. Masonry-exel finl. | = |
| | | B. Products Installed but not Furnished under This Section: | |
| | | Cast-stone trim in concrete unit masonry. | |
| | | C. Related Requirements: | |
| | | Section 051200 "Structural Steel Framing" for installing anchor sections of adjustable manonry anchors for connecting to structural steel frame. | |
| | | 1.3 DEFINITIONS | |
| | | A. CMU(s): Concrete masonry unit(s). | |
| | | B. Reinforced Masonry: Masonry containing reinforcing steel in grouted cells. | |
| | | | |
| | | A. Preinstallation Conference: Conduct conference at Project site. | |
| | | | |
| | | 1.5 ACTION SUBMITTALS | |
| | | A. Product Data: For each type of product. | |
| | | CONCRETE UNIT MASONRY 042200 - 1 | |

Step 3: Select Extraction Regions

The user will be prompted to draw four boxes for the specification number, specification name, the content frame, and the distance between bullet points, as shown in the above screenshot. When drawing each box, make sure to draw it large enough to capture all of the text for each region.

NOTE: For each step in the selection process, there is a Watch Training Video link available that will display a video demonstrating the drawing/selection process.

Specification Number

A red box will be used to draw around the specification number.

Specification Name

A blue box will be used to draw around the specification name.

Content Frame

A black box will be used to draw around the content frame. This tells the tool where the main content is and ignores the header and footer of the document.

Distance Between Bullet Points

A green box will be used to specify the distance between each bullet point. This tells the system how much space there is between the main header and subsequent bullet points. It uses the spacing to grab each sub-bullet point as a new submittal.

NOTE: The green selection box needs to be touching the bullet point.

Step 4: Grid View

| Doc | umer | nt Data Extracti | ion | | | | | | | | | — C | |
|-----|------|------------------|-------------|--------|--------------------------|--------|----------|---------|---------|----------|------------------|--------|---|
| | 0 | Sheet Label | Sheet Title | Label | Sheet Name | Design | Designer | Section | Section | Revision | Revision Date Ve | rsion | |
| 1 | 0 | 042200 - 1 | (0010)7607 | 42200 | CONCRETE UNIT MASONRY | | | | | 0 | 13/05/2019 | | |
| 2 | 0 | 051200 - 1 | TO DE LA MA | 051200 | STRUCTURAL STEEL FRAMING | | | | | 0 | 13/05/2019 | | |
| 3 | 0 | 053100-1 | (10) | 053100 | STEEL DECKING | | | | | 0 | 13/05/2019 | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | • |
| | | | | | | | | | | | | | |
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| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | low Multi Select | û 🖉 | X 🖪 C | ッじ C ≻ | | | | | | Validate | Cancel | |

Once the extraction regions have been selected and processed, the Grid View shows that the pages have been separated and the user can edit each column like drawings. The first two columns are snapshots of the sheet name and label, while the rest of the columns can be edited.

Allow Multi-Select – Toggle

Switch this toggle on to enable multi-select. Once enabled, the following icons will become available:



🔟 – This icon will delete selected sheets.



— This will update the column text for the selected sheets.



- This will trim the column text for the selected sheets.



— This will append the column text for the selected sheets.



↔ – This will allow the user to specify extraction regions for the selected sheets.



C – Rotate the selected sheets right.



Click **[Validate]** when editing is complete. Once the data has been validated, the **[Link Files**] button will appear. Click this button to place hyperlinks on matching sheet labels.

Step 5: Linked Files

| Document Data Extraction | | — 🗆 X |
|---------------------------------|--|------------------------------|
| Label Sheet Name | @ ■ ♠ 🗙 🕸 🕺 | 💍 Aal 💠 🔍 🔍 < 1 of 14 🔿 |
| 42200 CONCRETE UNIT MASONRY | | |
| 051200 STRUCTURAL STEEL FRAMING | CHILIDDENSE THER ADV REACT. | |
| 053100 STEEL DECKING | BOISE, ID | CIF |
| | SECTION 042200 - CONCRETE UNIT MASONRY | |
| | PART 1 - GENERAL | |
| | 1.1 RELATED DOCUMENTS | |
| | A. Drawings and general provisions of the Contract, including Gen Conditions and Division 01 Specification Sections, apply to this Section | eral and Supplementary n. |
| | 1.2 SUMMARY | |
| | A. Section Includes: | |
| | Concrete macorry units. Concrete macorry units. Pro-faced concrete masorry units. Mort and grout. Kostel reinforcing bars. Masorry-coll full. Masorry-cell fill. | |
| | B. Products Installed but not Furnished under This Section: | |
| | C. Related Requirements: | |
| | Section 051200 "Structural Steel Framing" for installing anch masony anchors for connecting to structural steel frame. | or sections of adjustable |
| | 1.3 DEFINITIONS | |
| | CMU(s): Concrete masonry unit(s). | |
| | B. Reinforced Masonry: Masonry containing reinforcing steel in grouted c | ells. |
| | 1.4 PREINSTALLATION MEETINGS | |
| | A. Preinstallation Conference: Conduct conference at Project site. | |
| | 1.5 ACTION SUBMITTALS | |
| | A. Product Data: For each type of product. | |
| Back Proceed Cancel | CONCRETE UNIT MASONRY | 042200 - 1 |

Once the hyperlinks have been processed, a list of labels will appear on the left-side panel and the user can click each label to view the sheets available on the right-side panel, as shown in the above screenshot. When the [**Proceed**] button has been clicked, the following Confirmation pop-up window will appear.



It is recommended to click [**No**] to open up edit mode after processing, as clicking [**Yes**] will auto-create the submittals for the user.

Step 6: Editing Submittals for the Specification



This screen allows the user to edit the Name, Description, and Type fields for the submittals. The Add New Submittal icon (+), found near the bottom left corner of the window, allows the user to create a new submittal and add it to the specification section under any of the sub-specification sections. Each sub-specification section shows how many submittals it contains in brackets. Once editing is complete, click the [**Upload**] button. The submittals will appear in CMiC Field > Document Management > Submittals and can be found using the Spec. Section column.

Step 7: Submittals

Once the upload process is complete, navigate to the Submittals screen found in CMiC Field > Document Management. The submittals that were processed can be found in the Spec. Section column.

Setup

RTI Settings

The following RTI setup is required on the RTI Maintenance screen in CMiC Field and on the General tab of the ECM Explorer Settings screen.

CMiC Field

- Navigate to CMiC Field > File Maintenance > Real-Time Integration > RTI Maintenance.
- 2. In the Internal Site tab, add a new item called "CMIC", as shown in the screenshot below.

| CMIC FIELD | | | | | | | | Ø | ۵ ۵ |
|------------------------|-------------------------------|--------------------|------------------|---------------------|---------------------|--------------------|-------------------|--------------|------------|
| Menu Maintenance | Internal Site Internal Ad | pter External Site | External Adapter | External IP Address | Communication Links | E-Mail | Blackout Schedule | Adapter Type | Version 📎 |
| Enterprise PM | Save | | | | | | | | |
| Project System Options | Internal Site Name | | Transmit Url | | | Internal Site Vers | ion | | Action |
| Company Control | СМІС | | https://www.my | (compan) | | v1 ~ | | | +× |
| Project Maintenance | TEST2R12 | | https://www.mv | rcompany | | v1 ~ | | | 4 Y |
| Activities | | | | | | | | | |
| User-Defined Log Types | | | | | | | | | |
| User-Defined Logs | | | | | | | | | |
| Log Builder | | | | | | | | | |

3. In the External Site tab, add a new item called "GENERIC".

| CMIC FIELD | | | | | | | | | Ø | ۹ (| 0 |
|---------------------------|--------------------|------------------|---------------|------------------|---------------------|---------------------|--------|-------------------|----|-----------|---|
| User-Defined Log Types | 1 Internal Site | Internal Adapter | External Site | External Adapter | External IP Address | Communication Links | E-Mail | Blackout Schedule | Ad | apter Typ | • |
| User-Defined Logs | Save | | | | | | | | | | |
| Log Builder | External Site Name | | | | External Site | /ersion | | | | Action | |
| SdMenu_ACS_logs1 | CMICTEST | | | | vi v | | | | | . | |
| Default Filters | | | | | | | | | | T. | |
| User-Defined Fields | Docusign | | | | V1 ~ | | | | _ | +× | _ |
| User-Defined Classifiers | GENERIC | | | | v1 ~ | | | | | +× | |
| Report Assignment | test2 | | | | v1 ~ | | | | | +× | |
| Prompt Maintenance | Textura | | | | v1 ~ | | | | | +× | |
| User Defaults Maintenance | | | | | | | | | | | • |
| Contract Type Maintenance | | | | | | | | | | | |
| Document Merge | | | | | | | | | | | |
| A Real-Time Integration | | | | | | | | | | | |
| RTI Maintenance | | | | | | | | | | | |
| RTI Mapping | | | | | | | | | | | |
| RTI Error Log | | | | | | | | | | | |
| RTI Log | | | | | | | | | | | |
| File Upload | | | | | | | | | | | |
| Auto Cold Storage | | | | | | | | | | | |
| Job Scheduler | | | | | | | | | | | |
| | | | | | | | | | | | |

RTI Maintenance; standard Treeview path: *File Maintenance > Real-Time Integration > RTI Maintenance – External Site tab*

- 4. In the Internal Adapter tab, set the following for each adapter type:
 - Http Receive Adapter for Generic: GENERICRA
 - Http Transmit Adapter for Generic: GENERICTA

NOTE: If the "CMIC" option is missing from the Internal Site drop-down list and there is no option to add a new row, click the [**Save**] button.

| CMIC FIELD | | | | | | Ø (|
|---------------------------|---|------------------------------|------------------------|------------------------------|-------------------|----------------|
| Activities | Internal Site Internal Adapter | External Site External Adapt | er External IP Address | Communication Links E-Mail | Blackout Schedule | Adapter Type 🜔 |
| User-Defined Log Types | INTERNAL SITE CMIC | VERSION v1 | | | | Save |
| User-Defined Logs | Adapter Type | Adapter Name | Adapter ID | JMS Queue Connection Factory | JMS Queue Name | Adapter Pro |
| Log Builder | Http Receive Adapter for CMIC Software | CMIC-Test12c-Receive | CMIC-Test12c-Receive | | | нттр |
| SdMenu_ACS_logs1 | Http Receive Adapter for DocuSion | DOCUSIGNIRA | DOCUSIGNIRA | | | HTTP |
| Default Filters | | 0511501001 | 073/701/034 | | | |
| User-Defined Fields | Http Receive Adapter for Generic | GENERICRA | GENERICKA | | | нттр |
| User-Defined Classifiers | Http Receive Adapter for Textura | TXR | TXR | | | нттр |
| Report Assignment | Http Transmit Adapter for CMiC Software | CMIC-Test12c-Transmit | CMIC-Test12c-Transmit | | | нттр |
| Prompt Maintenance | Http Transmit Adapter for DocuSign | DOCUSIGNITA | DOCUSIGNITA | | | нттр |
| User Defaults Maintenance | Http Transmit Adapter for Generic | GENERICTA | GENERICTA | | | нттр |
| Contract Type Maintenance | Http Transmit Adapter for Textura | тхт | TXT | | | нттр |
| Document Merge | | | | | | |
| ∡ Real-Time Integration | | | | | | |
| RTI Maintenance | | | | | | |
| RTI Mapping | | | | | | |
| RTI Error Log | | | | | | |
| RTI Log | | | | | | |
| File Upload | | | | | | |
| Auto Cold Storage | | | | | | |
| Job Scheduler | | | | | | |
| | | | | | | |

RTI Maintenance; standard Treeview path: *File Maintenance > Real-Time Integration* > *RTI Maintenance – Internal Adapter tab*

- 5. In the External Adapter tab, set the following for each adapter type:
 - Http Receive Adapter for Generic: GENERICRA
 - Http Transmit Adapter for Generic: GENERICTA

| Internal Site | Internal Adapter | External Site | External Adapte | r External IP Address | Communication Links | E-Mail | Blackout Schedule | Adap | ter Type 🜔 |
|----------------------|-------------------|---------------|-----------------|-----------------------|---------------------|--------|-------------------|------|-------------|
| EXTERNAL S | ITE GENERIC | ~ | VERSION v1 | | | | | Save | |
| Adapter Type | | Adapter Name | | Adapter ID | External Client ID | | External Username | | External Pa |
| Http Receive Adapter | for Generic 🗸 | GENERICRA | | GENERICRA | | | | | |
| Http Transmit Adapte | r for Generic 🗸 🗸 | GENERICTA | | GENERICTA | | | | | |
| | | | | | | | | | |

RTI Maintenance; standard Treeview path: File Maintenance > Real-Time Integration > RTI Maintenance - External Adapter tab

- 6. In the Communication Links tab, make the following changes to each field:
 - Change Software System to "Generic"
 - Link: GENERICL1
 - Link Identify Code: GENERICL1
 - Internal Site: CMIC
 - Internal Receive Adapter: GENERICRA

- Internal Transmit Adapter: GENERICTA
- External Site: GENERIC
- External Receive Adapter: GENERICRA
- External Transmit Adapter: GENERICTA
- Validate IP Address: No

| Internal Site | Internal Adapte | er Externa | I Site External Ada | pter External IP Add | iress Comm | unication Links E-M | lail Blackout Schedu | ile Adapter Ty | /pe 🜔 |
|---------------|--------------------|---------------|--------------------------|---------------------------|---------------|--------------------------|---------------------------|---------------------|--------|
| SOFTWAR | RE SYSTEM GEN | IERIC | ~ | | | | | Save | |
| Link | Link Identity Code | Internal Site | Internal Receive Adapter | Internal Transmit Adapter | External Site | External Receive Adapter | External Transmit Adapter | Validate IP Address | Action |
| GENERICL1 | GENERICL1 | CMIC ~ | GENERICRA 🗸 | GENERICTA 🗸 | GENERIC ~ | GENERICRA 🗸 | GENERICTA V | No 🗸 | +× |
| | | | | | | | | | Đ |

RTI Maintenance; standard Treeview path: File Maintenance > Real-Time Integration > RTI Maintenance - Communication Links tab

ECM Explorer

In the ECM Explorer Settings' General tab, navigate to the RTI Configuration section.

1. RTI WS Base URL: https://[environment]/

e.g. https://test2v12.cmic.ca:8888/cmictest12c/

- 2. Link Identity Code: GENERICL1
- 3. Receive Adapter Identity Code: GENERICRA
- 4. Transmit Adapter Identity Code: GENERICTA

| General | Servers | Proxy | Cloud | Drawing Manageme | nt | | | | |
|--------------------------------|--------------------|--------------------|------------------|------------------|---|-----------------------|--|--|--|
| Synchronizat | ion | | | | | | | | |
| | Auto-Sy | ncronize Files Fi | requency | | Retry failed Sync | hronization Frequency | | | |
| 30 Min | | | | I I I I | 15 Min | | | | |
| | Pull N | Notifications Free | luency | | | | | | |
| | | 0 Min | I I I I I | | | | | | |
| Lock | | | | | Revisions | | | | |
| Lock all do | wnloaded files. | | | | Synchronize latest revisions only. Synchronize all anticipations | | | | |
| O Ask before | downloading files | | | | Synchronize all revisions. | | | | |
| No Lock or | n downloaded files | | | | C Enable server auto renaming | | | | |
| Document Ex | traction Output I | Folder | | | Drawing Data Extraction | Application Version | | | |
| C:\ECM Extrac | tion | | Set Default | Browse | Extract Designer Ref. Value | 5.1.58.0 | | | |
| RTI Configur | ation | | | | | | | | |
| RTI WS Base U | RL | https://test2v1 | 2.cmic.ca:8888/0 | cmictest12c/ | | | | | |
| Link Identity C | ode | GENERICL1 | | | | | | | |
| receive Adapt Transmit Adap | ter Identity Code | GENERICKA | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

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