Specifications Extraction – Quick Guide

Overview – Specifications Extraction

This quick guide explains how to use the specifications extraction feature in CMiC ECM Explorer to extract specification details from a project manual/specifications book to automatically generate a submittal log in CMiC Field.

Performing a Specifications Extraction

## Step 1: **Preparing a Specifications Document for Extraction**

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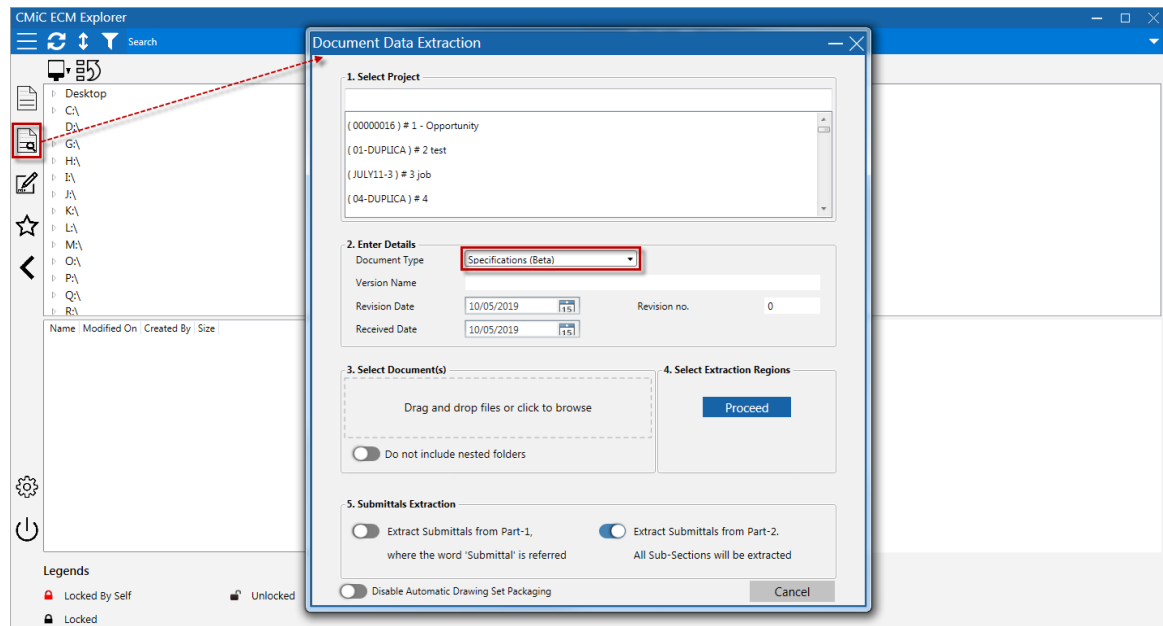
In CMiC ECM Explorer, click on the Data Extraction icon ( ) to open the Document Data Extraction pop-up window. After selecting a project in the Select Project section, change the Document Type field in the Enter Details section to "Specifications (Beta)", as shown in the above screenshot.

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.

Step 3: **Select Extraction Regions**
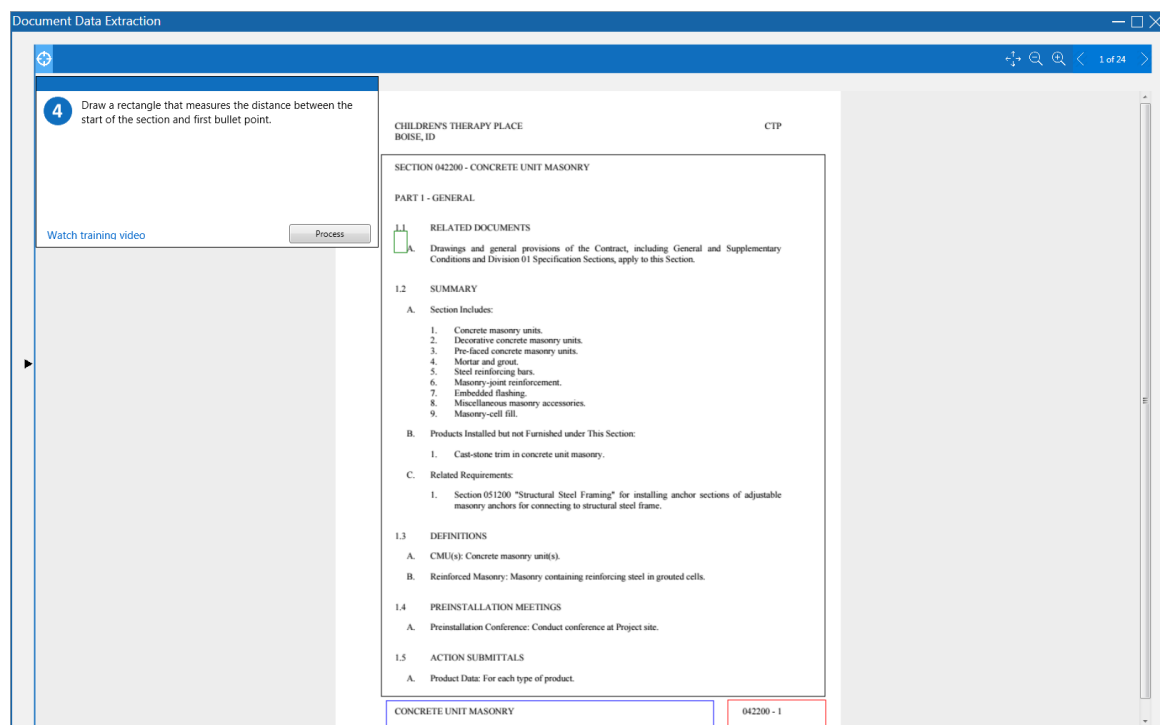
The user will be prompted to draw four boxes for the specification number, specification name, the content frame, and the distance between bullet points, as shown in the above screenshot. When drawing each box, make sure to draw it large enough to capture all of the text for each region.

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.
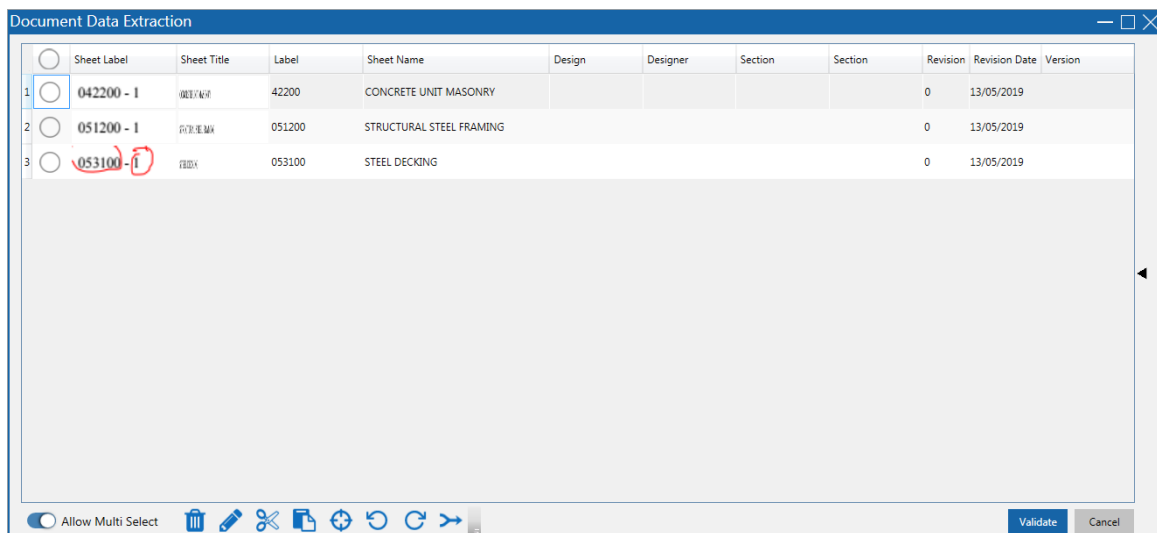
Content Frame

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**

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.

 – Rotate the selected sheets left.

 – Rotate the selected sheets right.

 – Combine the selected sections.

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**
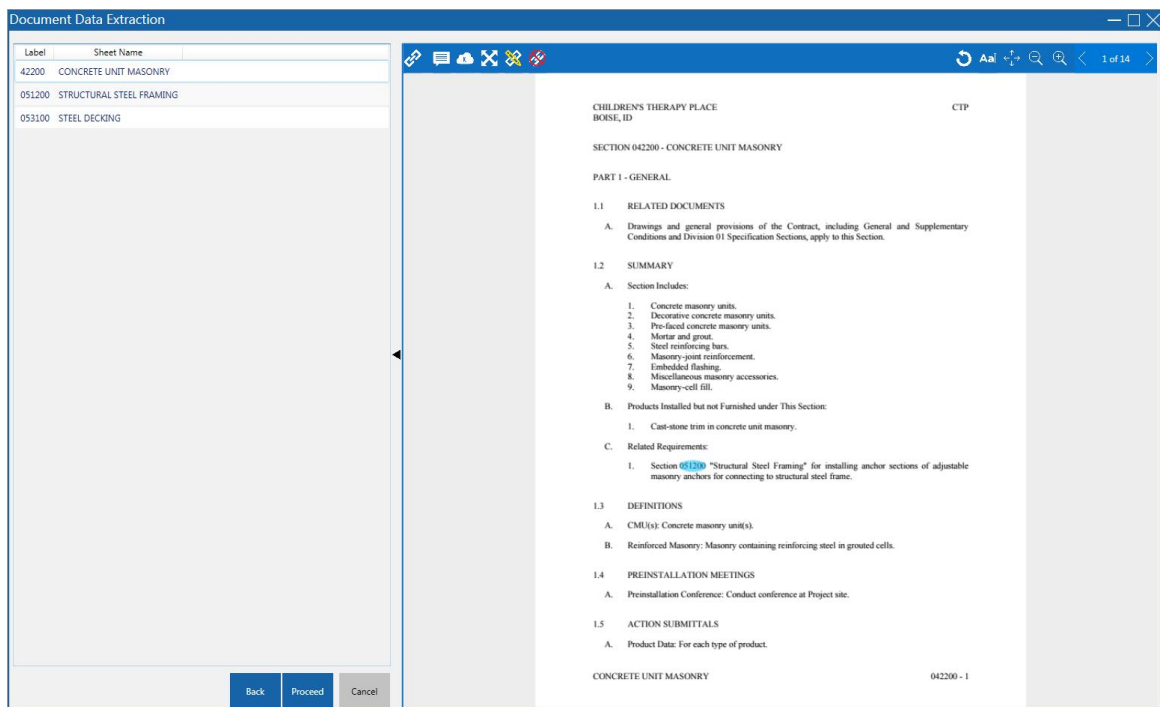
Once the hyperlinks have been processed, a list of labels will appear on the left-side panel and the user can click each label to view the sheets available on the right-side panel, as shown in the above screenshot. When the [**Proceed**] button has been clicked, the following Confirmation pop-up window will appear.
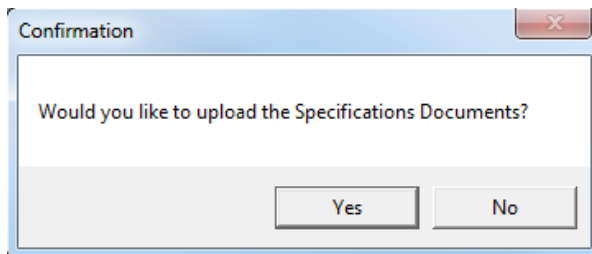
It is recommended to click [**No**] to open up edit mode after processing, as clicking [**Yes**] will auto-create the submittals for the user.

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

Submittals; standard Treeview path: CMiC Field > Document Management > 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, framed in red above.

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

1. 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.

3. In the External Site tab, add a new item called "GENERIC".
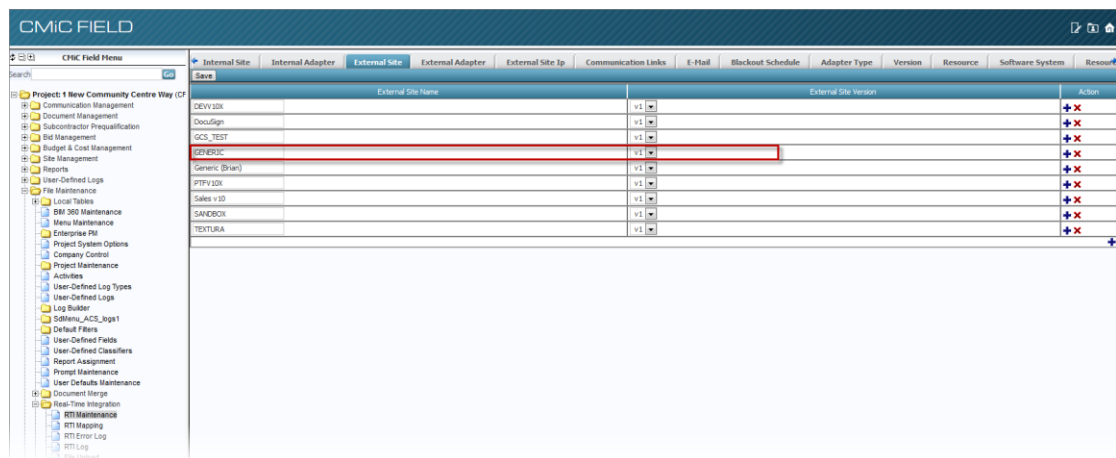
RTI Maintenance; standard Treeview path: File Maintenance > Real-Time Integration > RTI Maintenance – External Site tab

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.

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

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 Adapter	External Site	External Adapter	External Site Ip	Communication Links	E-Mail	Blackout Schedule	Adapter Type	Version	Resource	Software System

Software System Generic ▼   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 ▼	No ▼	✚ ✖ ✚

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://v10xsandboxwls.cmicglobal.com/cmicprod/

2. Link Identity Code: GENERICL1

3. Receive Adapter Identity Code: GENERICRA

4. Transmit Adapter Identity Code: GENERICTA