User Reference (v10x)

Enterprise Content Management (ECM)

By CMiC



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Computer Methods International Corp. 4850 Keele Street Toronto, Ontario M3J 3K1 Canada

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User Reference Guide – Version: CMiC Open Enterprise v10x

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Enterprise Content Management

Overview – Enterprise Content Management (ECM)

Enterprise Content Management is a CMiC document management and tracking system that integrates Image Manager and Project Management with MS Outlook and MS Word via plug-ins.

Within Outlook, emails and email attachments can be dragged from Outlook and dropped onto an Image Manager folder (including PM Attachments) or file, thereby creating a new document or document revision in CMiC. Word documents can also be modified in the Image Manager interface. Once the documents are loaded into CMiC via ECM, other CMiC programs can use them (e.g. Workflow, PCI's, Subcontracts, Daily Reports etc.).

Pre-requisites

Imaging Security setup for relevant Imaging Document Type

PM Document security set up for Attachments document type (for now only this type is supported).

Ensure IMG Systems Options (IMG_SYSTEM_OPTION) flags for ECM are turned on:

- IMGSO_IMGMGR_FLAG
- IMGSO_PMDOC_FLAG
 - * if the Imaging flag is on, the Imaging folders will be displayed in the Outlook plug-in.
 - * if the PM flag is on, the PM folders will be displayed in the Outlook plug-in.
 - * if the flags are off, the folders do not appear in the Outlook plug-in.

Installation of Plug-Ins

If the Plug-in has not been installed on your system, contact your System Administrator to obtain the required files and run the .EXE for the necessary plug-in, or have them installed by your IT Department.

For Outlook, use and run the setup.exe file in the Outlook Plug-In folder.

For Word, use and run the setup.exe file in the Word Plug-In folder.

For silent/parameterized installation:

a. Install Prerequisites:

Install the ECM plugin prerequisites silently using these commands:

"Installer Folder Path\VSTOR30\vstor30.exe" /q:a /c:"install /q /l"

"Installer Folder Path\VSTOR30\vstor30sp1-KB949258-x86.exe" /q:a /c:"install /q /l"

b. Install Plugin:

After installing the prerequisites, run the "setup.exe" with the following CML statement: For normal installation:

"Installer Folder Path\setup.exe" /q

For Parameterized installation pass the values with following parameters:

SETALLUSERS – possible value (0/1)

SERVICEURL- [servername]/[environmentname]

Examples:

"Installer Folder Path\setup.exe" /q SETALLUSERS=1

"Installer Folder Path\setup.exe" /q SETALLUSERS=1 SERVICEURL= <servername>:<xxxx>/<environmentname>

ECM Documents

Overview – ECM Documents

AR INVOICE E	INTRY					Table Mode	💾 Save 🗐 🗟 🖗	
Enter Batch Number								
Ent	• Tanaina	O Desiret Endia Lina		O				
Ent	er invoices	Frint Edit List	Frint Invoices	Post involces				
SELECTION CRITERIA								
* Company CCC	CMiC Test Cons	struction Company						
* Batch	26713 🔺 trtrtr			Create Batch				
Invoice Details Ø Search 륜 1 * Customer Job Series Code	Defaults Defete Previ ABC100 PCIDETAIL2	ous Next One of the second s	Workflows + 🖨 Report Options + 🖉 Atta truer 100.00 Address	achments Notes 🖉 EC Ø Sh Ø U Sp Se De	M Documents 말 중합 ow ECM Document Islaad ECM Document affice ECM Searches			
* Invoice	456789	Retainage	Order Num	115				
- Inv Date	21.01.2015	Othes Taxes	0.00 Eucleance Pate	1 0000000	US Dollars			
Retainage %	10.00	Discount	0.00 * Interest Code	1.000000	Interest RATE Code			
Discount Date	06-01-2015	Net	100.00 * Collector	CO11	Debt Collector			
Discount %	0.00		Tax1 Retainage					
Description	test							
Ret. Released			Tax Released					
	Release Retainage Dis	tribution Details	Save and New Print Invoice					

Example of [ECM Documents] button in Block Toolbar of AR Invoice Entry screen (Pgm: ARINVFM – AR Invoice Entry; standard Treeview path: Accounts Receivable > Invoice > Enter Invoices)

The [**ECM Documents**] button is located on the Block Toolbar of most CMiC Enterprise screens, as shown in the screenshot above. Clicking on this button displays up to four menu options in a drop-down menu, depending on the screen. Since any screen within CMiC Enterprise can be given the ability to query and display images according to the current data record, the options "Define ECM Searches" and "Search ECM Documents" always appear in the drop-down menu. Each screen can have multiple searches defined using the "Define ECM Searches" option. Searches are user defined, allowing for maximum flexibility and customization. When the user is in a particular screen, for example the AR Invoice Entry screen, they can, if at least one image search has been defined, view the images with a relationship to the current record using the "Search ECM Documents" option.

The "Show ECM Documents" and "Upload ECM Documents" menu options are connected to a document type in Imaging and associated to a flysheet. To allow an upload via ECM documents, information must be entered on the screen and saved. Once a document is uploaded, the information on the screen is then entered into the associated flysheet and the image status is set to submitted. The "Show ECM Documents" and "Upload ECM Documents" menu options are only available in the following screens:

- AP Voucher
- AR Invoice
- AR Payment

- GL Transaction Entry
- JB Prepare Billing
- JC Transaction Entry
- PO Job Shipment Receiving
- Vendor Compliance Detail

The following subsections contain more detailed information on each of the menu options in the [ECM Documents] button.

NOTE: The AP Voucher screen will include the "Show ECM Documents" and "Upload ECM Documents" in a future release. JB Prepare Billing refers to the JBBILL screen. The standard Treeview path is Job Billing > Billing > Prepare Billing.

Upload ECM Document

AR INVOICE E	NTRY						Table Mode	💾 Save 📄	- (j)	⑦ ⊥	[] □ 0
Enter Batch Number											
Ent	er Invoices	O Print Edit List	Print	O Invoices	Post Invoices						
SELECTION CRITERIA											
* Company CCC	CMiC Test Con	struction Company									
* Batch	26713 🔺 trtrtr			Ci	reate Batch						
Invoice Details	Defaults										
	berderes										
🖸 Search 🛛 🔂 I	nsert 🚓 Delete 🛛 🔶 Prev	/ious 📫 Next 🍥	Workflows 🔻 🖨 Repo	rt Options 🛛 👻 🧳 Attac	hments Notes	A Documents V 66 User Extensions					
* Customer	ABC100	ABC100 Business	Partner		// Shi	ow ECM Document					
Job	PCIDETAIL2				⊘ up	Inch ECM Documents					
Series Code	A	Sales	100.00	Address	De	ine ECM Searches					
* Invoice	456789	Retainage		Order Num							
* Inv Date	01-01-2015	Taxes	0.00	Currency	US 🔺	US Dollars					
Due Date	31-01-2015	Other Taxes	0.00	Exchange Rate	1.0000000						
Retainage %	10.00	Discount	0.00	* Interest Code	IR1	Interest RATE Code					
Discount Date	06-01-2015	Net	100.00	* Collector	COL1	Debt Collector					
Discount %	0.00	1		Tax1 Retainage							
Description	test			-							
Ret. Released				Tax Released							
	Release Retainage Dis	stribution Detai	Is Save and New Pr	int Invoice							

Pgm: ARINVFM – AR Invoice Entry; standard Treeview path: Accounts Receivable > Invoice > Enter Invoices

The "Upload ECM Document" option opens the Image Upload pop-up window where the user can select the document type and source and select a file to be uploaded to Image Manager. To upload a file, either click on the [**Browse**] button or use the drag-and-drop method if the Windows Explorer is already open.

Image Upload
Document Type CMiC AR Invoice 💌
Document Source Image Linking
UPLOAD
Files Browse No file selected.
or drop files here
Cancel Upload

Click the **[Upload]** button to start the uploading process or click **[Cancel]** to exit the window without uploading a file. An asterisk (*) will appear next to the **[ECM Documents]** button to indicate that files have been uploaded.

Show ECM Document

AR INVOICE E	NTRY								able Mode	💾 Save 🗐 🗧	7 1	⊙ ∆	[} ⊽ Ø
	•		0		0	0							
Ent	er Invoices		Print Edit List	Print	Invoices	Post Invoices							
SELECTION CRITERIA													
* Company CCC		CMIC Test Const	truction Company										
* Batch	26713 🔺	trtrtr			0	reate Batch							
Invoice Details	Defaults												
		data de Danié		weighter ber			4.D	User Francisco					
p search and in	isent and De	aete 🗬 Previ	ous 📭 Next 🧐	worknows • 😁 kepc			w ECM Document	oser extensions					
* Customer	ABC100		ABC100 Business	Partner		// Up	load ECM Document	1					
Job	PCIDETAIL2					Sei	arch ECM Documents						
Series Code			Sales	100.00	Address	De	fine ECM Searches						
* Invoice	456789		Retainage		Order Num								
* Inv Date	01-01-2015	120	Taxes	0.00	Currency	US 🔺	US Dollars						
Due Date	31-01-2015	120	Other Taxes	0.00	Exchange Rate	1.000000							
Retainage %	10.00		Discount	0.00	* Interest Code	IR1	Interest RATE Code						
Discount Date	06-01-2015	10	Net	100.00	* Collector	COL1	Debt Collector						
Discount %	0.00				Tax1 Retainage								
Description	test												
Ret. Released					Tax Released								
Į.	Release Ret	tainage Dist	tribution	Is Save and New	rint Invoice								ļ

Pgm: ARINVFM – AR Invoice Entry; standard Treeview path: Accounts Receivable > Invoice > Enter Invoices

The "Show ECM Document" option will only be enabled if documents have been uploaded using the "Upload ECM Document" option. When this button is clicked, the Image Manager will open in a new tab and display the document uploaded to the associated screen, as well as the flysheet containing the information entered on the screen.

Search ECM Documents

The following screenshot is an example of the results of an image search showing scanned images in CMIC's ECM repository.

		Home Refres	h			Prev Ne	ext Upload	Image Export	Query Mode	we Delete S	Save Update S	Submit Upload Mu	Itiple Docume	ents Export to I	Excel	
Types *All Types		 Status *All 	-													-
Image Manager	plication [1]				*		Doci	ument Name TH	101.001D1.pdf		- 2		Submit S	ubmitted		۲
HUU1.00	ID1.pdf									C Pay Request	t Header					۵ ـ
							Company	7 10 CMIC	CONSTRUCTION IN	С.						
							Job	TH001 ARB	OR VILLAGE - UNIT	1			-			
							Routing job	TH001 ARB	OR VILLAGE - UNIT	1			-			
-			. 100000	-			Vendor Code	90223 THE	MALCOLM COMPAN	Y, INC.: 437 OC	EANSIDE DRIVE		-			
م u	T 🕈 Page:	1 of 2 -	+ 80%	• N >>		PO	or Contract No.	TH001.00 INTE	RIOR RENOVATION				-			
				^			Invoice No.	TH001D1								
							Inv. Amount	518,904.00								
							Gross Amour	nt 576,560.00								
Pay App	lication Form - Page 1			AIA Document 0702			Invoice Date	11 25 15								
TO:	CMIC Construction Inc.	Project:		,			Due Dat	te 12 25 15								
	New York, NY 10002	Arbor village		F			Discount Dat	te 11 25 15	1							
				E			Description	TH001.001 Dra	rw 1							
FROM:	The Malcolm Company Inc.			¢.			Marnin	Warning: Cont	ract amount exceeded	l.						
	437 Oceanside Drive						**ditiii	9								
SUBCON	ITRACTOR'S APPLICATION FOR PA	YMENT		CERTIFICATE OF THE SUBC												
Applicatio	n is made for payment, as shown below, i	n connection with the Contract.	Continuation Sheet, AIA G705, is	I hereby certify that the work pi						SC Schedule of	Values					۲
attached.				actual value of accomplishment authorized changes thereto) be	Change Ta Desc	isk Cos ription Code	t Cost e Type	Contract Amount	Prev Cert Amount	Retainage Percent	Current C Retainage A	Current Con Amount An	npleted	Amount Retained	Retainage Release	Actions
1. ORIG 2. Net Ch	INAL CONTRACT SUM		<u>\$ 575,350.00</u> s ·	undersigned and CMIC Construc project. 1 also certify that all lab					Bo	tod Day Room	oct Dotaile					
3. CONT	RACT SUM TO DATE (Line 1 +/- 2)		\$ 575,350.00	contractors, and subcontractors	Task Code		Task Nar	ne	Task Amount	Completed Arr	ount Current Amount	Contract Retaina	ge Pct Com	Current Retan	inage Released	Actions
4. 101A 5. RETA	IL COMPLETED & STORED TO DATE INAGE:	(Loi G on G703)	5 576,560.00	as noted on the reverse side. 11	08.007	Counter Tops			2,790.00	4,000.00	4,000.00	400.00	143.37	0.00		
	a. 10 % of Completed Work	5	57,656.00	compiled withj all Federal, State	09.001	Wood Flooring	1		146,000.00	146,000.00	146,000.00	14,600.00	100.00	0.00		
	(Column D_E on G705) b% of Stored Material	5		and Workmen's Compensation	09.003	Cabinets			7,560.00	7,560.00	7,560.00	756.00	100.00	0.00		
	(Column F on G705)			the performance of this contrac	09.003	Drywall			9,000.00	9,000.00	9,000.00	900.00	100.00	0.00		
	Total in Column 1 of G703)				09.006	Painting			410,000.00	410,000.00	410,000.00	41,000.00	100.00	0.00		
6. TOTA	L EARNED LESS RETAINAGE		\$ 518,904.00	SURCONTRACTOR-	н	Retainage					-57,656.00			0.00		
7. LESS	PREVIOUS CERTIFICATES FOR PAYN	MENT	s -	By: Fred Malcolm	Totals	Totals			575,350.00	576,560.00	518,904.00	57,656.00	100.21	0.00		
(Line 6 8. CURR	from prior Certificate) (ENT PAYMENT DUE		\$ 518,904.00	state of: california c												
9. BALA	NCE TO FINISH, INCLUDING RETAIL	NAGE	\$ 56,446.00	Subscribed and sworn to before					Workfk	w Control and	Categorization					۲
(Line 5	less Line 6)			Notary Public: My Commission expires:			Invoice Typ	e .	Normal -							
CHAI	IGE ORDER SUMMARY	ADDITIONS DEDI	JCTIONS	· · · ·						Common	hs					0
Total ch by Gene	anges approved in previous month ral Contractor	s - s	.							- 20000-00						
Total ap	proved this Month	5 - 5	-							Voucher Comp	liances					۲
TOTALS NET CH	NGES by Change Order	5 - 5		-	Comp Dat	e Comp	Compli	ance Code		Bonding Co	mpany	Start Date		End Date	Amount	Actions +
		- 1 ²														

Define ECM Search

IMAGE SEARCH SETUP	💾 Save 🌗 Exit	(i) (i) (i	∆ ₽⊽Q
Program ARINVFM Block ARINVOICE SEARCH			
Verv Image: The Preze I			
DOCUMENT TYPES Vew v V Image: Colspan="2">Image: Colspan="2">Image: Colspan="2" C			
Uncategorized Document CONDITIONS			
Verver • <			

Image Search Setup pop-up window launched from the drop-down menu in the [ECM Documents] button

Defining a search is done directly in the CMiC Enterprise screen that requires the search to be added. To define the search, click on the drop-down menu of the [ECM Documents] button and click on the "Define ECM Searches" option.

The Image Search Setup screen is used to define/create the image searches required for the program. The system allows for more than one image search per program.

This facility has been designed to be as simple to use as possible, but it still requires that the user be familiar with table joins, functional operators plus, and/or statements.

ECM Documents Setup

Create Document Types

0	DOCU	MENT TYPES						🖺 Save 🕞 Exit 👔 🕐 .
General Ledger Accounts Payable Accounts Receivable Job Costing	Show I	nactive Document Types						
ubcontract Management hange Management	TYPES							
ob Billing Nork Order Billing	View 🕶	🍸 🖬 Freeze 🖷 Detach	🙍 Search 🛛 👼 Insert 📲 Ir	sert Multiple	🖽 Delete 🛛 🕲 Workflows 🖛 🔒	Report Options 🛛 👻 🔝 Export	₽ EC	M Documents 🛛 👻 💆 User Extensi
Requisitions Purchase Order inventory		* Document Type	Workflow Name	Show In Tree- View	Source Folder Name	Program Generic Name		* Active
Equipment Costing Preventive Maintenance	AP PO I	NV]	CMPOINV		Ap_Po_Inv		•	V
Naterial Sales	AP Regi	stered Invoice	CMREGINV	V	Ap_Registered_Invoice		•	
ixed Assets	AP Regi	stered Invoice RAVI	CMREGINV	V	Ap_Registered_Invoice_Ravi		•	
erayroli ternational Payroll	AP VOue	ther for HR		V	Ap_Voucher_For_Hr	AP Voucher	-	
iman Resources	APREGI	W HST		V	Apreginy Hst		-	
pportunity Management	An Regi	stered Invoices IRINA	CMAREGIN		An Registered Invoices Irina		-	
Setup	Balrai V	oucher Pay Requests	CMREIECT		Balrai Voucher Pay Requests		-	
System Options	CMIC IC	Transaction	ennageen		In Transaction	IC Transaction Entry		
Sources	CMIC AS	Invoice	1		Ar Invoice	AP Invoice		
Flysheets	Charle AP	Raymont	1		Ar Damont	AD Downant		
Imaging Control	CMIC AP	Transmitter			CI Transmiss	GL Transmiss Fater		
] Utilities	CMIC GL	. Iransaction			G_Iransaction	GL Iransaction Entry	•	V
Image Search	CMIC JC	Transaction - ADF			Cmic_Jc_Transaction_Adf	JC Transaction Entry	-	
Image Manager Exception Manager	Contrac	t Invoices	CMSCRFP	V	Contract_Invoice	GL Transaction Entry	-	
-	IB Billing	3			Jb_Billing		-	
arkflow		·						

Pgm: IMGDOCTP – Document Types; standard Treeview path: Imaging > Setup > Document Types

In the Document Types screen, activate the appropriate document type by checking the 'Active' box and select a screen in the Program Generic Name drop-down list to associate the screen with the document type.

DOCUMENT TYPES						💾 Save	Exit (
Show Inactive Document Types									
TYPES									
View 👻 🍸 🌇 Freeze 🖷 Det				Options 🛛 🛪 🔜 Export	ECN	1 Document	ts = 🖓 U	ser Extensi	ons
* Document Type	DOCUMENT TYPES		🖺 Save 🕡 🕐 🛆 📝 🗢 🗘	Program Generic Name		* Active			
AP PO INV				-	-	7			~
AP Registered Invoice	Document Type CMiC AR Invoice				-	V			
AP Registered Invoice RAVI	Subdirectory Ar_Invoice				-				
AP VOucher for HR				'oucher	-	V			E
APREGINV_HST					-	V			
Ap Registered Invoices IRINA	View 👻 🍸 🌇 Freeze 🖷 Deta	ch 🗖 S	Search 🛛 🖶 Insert 📲 Insert Multiple		-				
Balraj Voucher Pay Requests	* Source Des	cription			-	V			
CMiC JC Transaction	Cold Storage			ansaction Entry	-	V			
CMIC AR Invoice	Image Linking		A	nvoice	-				
CMiC AR Payment	Close			Payment	-	V			
CMiC GL Transaction				ransaction Entry	-	V			
CMiC JC Transaction - ADF				ansaction Entry	-				
Contract Invoices	CMSCRFP		Contract_Invoice	GL Transaction Entry	-				
JB Billing			Jb_Billing		-				
Jamal Doc Type 1			Jamal_Doc_Type		-				-
Source Assignment Flysheet Assig	gnment Document Type Security								

Assign Source to a Document Type

Pgm: IMGDOCTP – Document Types; standard Treeview path: Imaging > Setup > Document Types – [Source Assignment] button

Select the document type and click on the [**Source Assignment**] button to open the Source For This Document Type pop-up window. Click on the [**Insert**] button and select a source from the Source Description LOV. Click [**Save**] to save the change and [**Close**] to exit the window.

C 0	DOCUMENT TYPES						Save 🕞 Exit () ?	∆ D∕⊽C
General Ledger General Ledger Accounts Payable Joccounts Receivable Job Costing Subcontract Management Change Management	Show Inactive Document Types							
Job Billing Work Order Billing	View 👻 🍸 🌇 Freeze 🖷 Detach	🔯 Search 👼 Insert 📲 Inse	rt Multiple	🖶 Delete 🛛 🗞 Workflows 🛛 🖛 🔒 F	Report Options 🛛 🔻 🌉 Export	& ECN	M Documents 🛛 👻 🖧 User Extens	ions
Requisitions Purchase Order Inventory	* Document Type	Workflow Name	Show In Tree- View	Source Folder Name	Program Generic Name		* Active	
Equipment Costing Preventive Maintenance	AP PO INV	CMPOINV		Ap_Po_Inv		•		
Material Sales	AP Registered Invoice	CMREGINV	V	Ap_Registered_Invoice		-		
Fixed Assets IS Payroll	AP Registered Invoice RAVI	CMREGINV	V	Ap_Registered_Invoice_Ravi		-		
International Payroll	AP VOucher for HR			Ap_Voucher_For_Hr	AP Voucher	•		
Human Resources	APREGINV_HST		V	Apreginv_Hst		•		
Imaging	Ap Registered Invoices IRINA	CMAREGIN		Ap_Registered_Invoices_Irina		•		
□ Setup	Balraj Voucher Pay Requests	CMREJECT	V	Balraj_Voucher_Pay_Requests		•	V	_
System Options Document Types	CMiC JC Transaction		V	Jc_Transaction	JC Transaction Entry	•		
Sources	CMIC AR Invoice	A	<	Ar_Invoice	AR Invoice	•	V	
Flysheets Viewer by Type	CMiC AR Payment		V	Ar_Payment	AR Payment	-		
Imaging Control	CMiC GL Transaction		V	GI Transaction	GL Transaction Entry	-		
E Utilities Image Search	CMIC JC Transaction - ADF		V	Cmic Jc Transaction Adf	JC Transaction Entry	-		
Image Manager	Contract Invoices	CMSCREP		Contract Invoice	GL Transaction Entry			
Exception Manager	IB Billing		7	Ib Billing				
Worknow Business Intelligence	Jo oming			Jogoning				
E 1099			V	Jamai_Doc_Type				

Assign Document Types to Flysheets

Pgm: IMGFLYFM – Flysheet Definition; standard Treeview path: Imaging > Setup > Document Types

In the Document Types screen, select the document type and click the [Flysheet Assignment] button on the bottom of the screen.

CMiC ECM in MS Outlook

ECM in Outlook

02 🗉									Inbox	- N
FILE	HOME	SEND / RECEIVE	FOLDER	VIEW	ADD-INS	BLUEBEAN	1			
🛃 CMi	C ECM Settings	Connect to C	MiC ECM	u Snagit	🛃 Window	·				
Men	u Commands	Toolbar Comr	mands	Ci	istom Toolbars					
>	Search Curren	t Mailbox (Ctrl+E)			P Cu	rrent Mailbox	-			
5	All Unrea	d			By Date 🔻	Newest ↓				
ox 2	Distance Today									
Inb	Yesterday									
R	Wednesda	у								
ail 2	Tuesday									
M be	▷ Monday									
Jnrea	Last Week									
	> Two Week	s Ago								
Items	> Three Wee	ks Ago								
Sent.	E Last Mont	h								

The CMiC ECM Plug-In is located in the ADD-INS section of the menu.

Clicking on CMiC ECM Settings, framed above, brings up the following popup:

ECM Settings-CMiC Outlook Addin(3.1.2)
Server Details Proxy Details
Please enter the details to connect with CMiC ECM Repository
Enter the Login Details
Tenant Id: Enter CMiC Tenant ID
Username: da
Password: ••••••
Service URL: http://test4v10.cmic.ca:7785/cmictestv10x/MSPluginWebService/MSPlugin/MSPluginWS/
OK Cancel

Enter the Single Sign-On (SSO) user-ID, password and URL for the CMiC environment that is applicable.

Click [OK]. The user's security profile for the environment will take effect.

These settings will be retained every time the user signs into MS Outlook, until they are changed for another user.

Clicking on the [Connect to CMiC ECM] button will display the CMiC ECM section in Outlook:



Click the **CMiC ECM** root node, pointed to by the red arrow in the above screenshot, to expand the tree, revealing its 4 sub-nodes:

CMIC ECM	- ×
Search	
CMIC ECM	
Enterprise Documents	
🖪 Projects	
☆ Favourites	
Secent Items	

CMiC ECM Node	Description
Enterprise Documents	Provides access to the ECM documents in Image Manager.
Projects	Displays the Treeview with PM menu items.
Favourities	provides the quick access to the selected projects
Recent Items	stores the documents accessed recently

Expanding the nodes will display the folders and items under them. The displayed information is dependent on the user's Imaging and Project Management security.

Plug-In Interface Features

1. Control Panel



Performs the text search across the ECM content.

в. 🗉 / 🖃

The Attachment Detail / Detail View buttons toggle the view in the **Details** pane showing the details information/attachment information for selected PM item.

c. 🚺

Filters the documents to be displayed. Available options are:



D. ᠫ

Scrolls to the current project node if it is not visible.

E. 🗹 / 🗸

Show/ Hide option in the Treeview to select the Project, PM objects and Document types nodes to be visible for the user.

F. 🕄

Displays the versions of installed ECM plugin and Web service:



2. Context Menus

For each of the CMiC ECM nodes, there is a context menu that can be accessed via a mouse right-click.

Enterprise Documents – ECM Node

CMIC ECM	~ ×	CMiC ECM		- × ×
Search V D 🗄 Y 🕁 V 🛈		Search	▼ ▷ ☱ ▼ ጏ ✔ ❹	
		CMiC AP Invoice (0)	
Enterprise Documents		CMiC AR Check (C	D)	
Projects		CMiC AR Invoice ((0)	
☆ Favourites		CMiC AR Paymon		
Secent Items		CMiC GL Transact	Refresh	
		CMiC JB Contract	Billing (v)	
		Cold Storage Form	ns (0)	
		Contract Invoices ((268)	
		🔲 Daily Journal - DW	/P (0)	
		Emails (0)		
		Internal (0)		
		—		-

The Enterprise Documents have two options available:

- 1. Clear Cache: clear the local computer's cache.
- 2. **Refresh**: update the document list of this type from the server. This option is available for the document folders only.

Projects – ECM Node

	- ×
▼ ⁄≏ 🐨 🐨 🖸	

Available options are:

- 1. **Refresh**: updates the Projects tree from the server.
- 2. Hide Project Code / Show Project Code: hides or displays the Project code.
- 3. Sort by Project name / Sort by Project code: sorting options for the list of project.
- 4. Clear Cache: clears the cache on the local computer.

Project – Project Context Menu:

CMIC ECM	▼ ×
Search	▼♪ Ξ ▼ 5 0
IAL) 🖪	v14-09) test job
IAL) 🗔	V14-10) test new item
🖪 (JAI	Manage Uploads → Upload to Attachments
IAL) 🗐	Add to Favourites V Upload to Project Default Refresh Select folder on upload
IAL) 🖪	Clear Cache
IAL) 🖪	V21-02W) Estimate Management Testing - Jan. 21, 201
	104 00140 1 04 1

1. Manage Uploads

- Upload to Attachments: file will be uploaded to the Attachment document folder.
- Upload to Project Default: file will be uploaded to the default folder set in the Project System Options screen.
- Select folder on upload: a pop-up will open allowing you to select the document folder.

2. Add to Favourites

This option is used to add a selected project to the Favourites node for quick access. The icon appears next to the project added to 'Favourites';

3. Refresh

Updates the displayed items.

4. Clear Cache

Clears the cache on the local computer.

Project Items Context Menu

🕒 Submittals (11)		
📃 Daily Journal (4	•)	
PCI (17)		
Communicasor	Apply Filters	
? RFls (0)	Refresh Hide Codes	
! Issues (0)	Sort by name Sort by code	
Documents (37	Show files Clear Cache	
☆ Favourites		
Secent Items		
•		

Available options are:

1. Apply Filters

The option is used to apply filters to the selected type of the PM items.

- Mine: shows the PM items that have user names in the To or CC fields.
- Not Submitted: only PM items which are created but not submitted are displayed;

- Open Items: shows the PM items with status other than 'Closed'.
- 2. Refresh

Updates the displayed items.

3. Hide Code / Show Codes

Hide or display the PM item IDs.

4. Sort by name & Sort by code

Flags to control the sorting order of the PM items.

5. Show files

Shows the list of PM items in the lower pane of the ECM section.

6. Clear Cache

Clears the cache on the local computer

NOTE: The context menu for PCI and Daily Journal does not have **Apply Filters** and **Show Files** options. The **Documents** context menu has the same options as that of **Enterprise Documents**: **Clear Cache** and **Refresh**.

3. Detail Pane

The Details pane is located at the bottom of the ECM section and it shows information about a highlighted item.

Enterprise Documents

When the document type node is highlighted, the files stored in this folder are displayed in the **Details** pane. Left double-clicking the file will open it in the viewer:

CMIC ECM				~ >
Search		🔻 🗩 🗉 🗡	5 🛛 🕄	
New J	C Transaction (1)		-
📄 Non-C	Contract Invoices	s (5)		
00-	Ticket Adjustm	ent testing -		
205	51_19_10_web			
🔛 Cha	anges Made in	Using WBS Cod	des	
ror Inve	oice 3			
r RE	Unable to get i	nto PRODV10X	(
Perma	nent Rejected ((2)		
PM DF	RAWINGS (17)			
PM SC	CHEMATICS (7)			
🔲 PM TE	EST (4)			
				1
Title	Created On	Created By	Size	
00- Ticket Adjustment test.	7/4/13 4:05:37 PM	SMUSER6	196	
2051_19_10_web	6/1/12 9:35:23 AM	RAVI	112	
Changes Made in Using W	. 6/1/12 3:02:18 PM	SMUSER6	33	
Invoice 3	5/3/11 9:55:44 AM	DAR	0	
RE Unable to get into PR	5/9/12 9:34:43 AM	SMUSER6	26	
	The items stored displ	l in the folder are ayed.]	

Projects

When the PM items folder is highlighted the items in this folder are displayed:

CMIC EC	M		- ×
Search	ا A 🕨	i T 5 🗹 🖲	
🗐 Pro	ojects		<u>*</u>
☆Far	vourites		
E.	(ZZ-WALMART) ZZ Walmart		
	Ľ Submittals (11)		
	 Daily Journal (4) 		
	📃 (DLY0017) 3/4/14 3:12:24	PM (0)	
	E (DLY0018) 3/4/14 3:27:04	PM (0)	
	E (DLY0023) 8/20/14 10:00:	40 AM (0)	
	E (DLY0024) 8/20/14 2:14:5	6 PM (0)	
	PCI (17)	.,	
	Communications (3)		
			<u>-</u>
Journal No.	Status	Created By	
DLY0017	SUBMITTED	SMUSER6	
DLY0018	SUBMITTED	SMUSER6	
DLY0023	PENDING	DA	
DLY0024	PENDING	DA	
	The items stored in the folder are displayed.		

When the PM item is highlighted, the displayed information depends on the state of the Attachment Detail / Detail View buttons (see the item 1.B in the **Plug-In Interface Features** section):



In Details mode, the information in some fields can be modified. Double clicking fields starts the Edit mode:

CMIC ECM			- ×	
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☆(ZZ-W	ALMART) ZZ Wal	mart		
Ľ Sub	omittals (11)			
🖃 Daily Journal (4)				
PCI	(17)			
Con 🔍	nmunications (3)			
<u></u>	CID0004) Test (4)			
? (CID0007) hyry (0)			
? (CID0008) gu (0)			
? RFIs	s (0)			
! Issu	es (0)			
Doc	cuments (41)		-	
•			Þ	
Communication Details	CIDADAA			
Corp Communication No.	CID0004			
Received Status	N			
Submit Status	PENDING	The 'Subject' and		
From	Database Admin	Communication item can		
To	Database Admin	be modified. Double click		
Subject	Test	will start the 'Edit' mode.		
Message	TEstin			

In the 'Attachment Detail' mode the following options are available (upon right click on selection):

CMIC ECM			- ×		
Search	ר ≣ 🤜 🔻	r 🗅 🗹 🚯			
☆ (ZZ-WALMART) ZZ Walmart					
Ľ Submittals (11)					
🖃 Daily Journal (4	4)				
PCI (17)					
Communication	ns (3)				
😭 (CID0004) T	est (4)				
(CID0007) h	yry (0)				
[? (CID0008) q	u (0)				
? RFIs (0)					
Documents (41	D)				
	')		• •		
Name	Folder	Created On	Created Size		
Document Merge	Attachment	9/23/14 8:43:3	DA 0		
MSDS_Sample Download	Drawings	11/5/15 3:25:3	VADIMB 8		
Sample 2 Release Lock	Drawings	11/5/15 3:23:4	VADIMB 7		
[↓] SiteView11 Reclassify Repare	Drawings	11/5/15 3:24:1	VADIMB 0		
Kename					
1					

For multiple selection:

- Folder (and document type) for the selected documents can be changed (Reclassify option).
- Title of the selected documents can be modified (**Rename** option).
- Selected documents can be downloaded from the system (Download option).
- Selected documents can be locked/unlocked (Lock/Release Lock options).

For single attachments:

• Double clicking on **Name** or **Folder** field starts Edit mode and allows users to change the document title or folder (type) of the selected document respectively:

CMIC ECM		Ŧ	×	CMIC ECM				₹×
Search	• P ⊟ ▼	5 🗸 🕄		Search	-	ר ⊑ .	▼ 5 🗹 🕄	
☆ (ZZ-WALMART) ZZ Wal	mart			☆(ZZ-WA	LMART) ZZ Waln	nart		
Ľ Submittals (11)				🖆 Subr	nittals (11)			
🖃 Daily Journal (4)				📃 Daily	Journal (4)			
PCI (17)				PCI (17)			
Communications (3)				Com	munications (3)			
🛅 (CID0004) Test (4)				 (C	CID0004) Test (4)			
[?] (CID0007) hyry (0)				? (C	CID0007) hyry (0)			
(CID0008) gu (0)				? (C	CID0008) gu (0)			
? RFIs (0)				? RFIs	(0)			
Issues (0)				! Issue	es (0)			
Documents (41)		Þ	•	Docu I	uments (41)			·
Name	Folder	Created On Created S	ze	Name	Folder	Created On		~~ ,
Document Merge	Attachment	9/23/148:43:3 DA 0		[↓] 🔒 Document Merge	Attachment	9/23/148:4	I he Folder (and document type) can	
MSDS_Sample	Drawings	The highlighted		[↓] ■ MSDS_Sample	Drawings	11/5/15 3:2	be changed. Double	2
[↓] ■ Sample 2	Attachment	'Name' field is in		[↓] ■ Sample2	Attachment	11/5/15 3:2	click starts the 'Edit'	2
[↓] ■ SiteView11	Drawings	be modified.	Ш	[↓] SiteView11	Drawings -	11/5/15 3:2	Document type LOV.	
			۳II.		Audio/Video	_ `		
					Photos Schematics and Riversists			
					Test for issue 14.91683			

• Right clicking starts the context menu with following options:

CMIC ECM						- ×
Search		▼	:: م	1 1	☑ 🛈	
☆(zz-w	ALMAR	T) ZZ Walm	art			<u></u>
🖆 Sut	omittals ((11)				
🖃 Dai	ly Journ	al (4)				
PC	(17)					
Cor	mmunic	ations (3)				
Ê	(CID000	4) Test (4)				
?	(CID000	7) hyry (0)				
?	(CID000	8) qu (0)				
?RF	s (0)	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,				
	ues (0)					
a Dov		(11)				_
1		· (+ ·)				▼ ▶
Name	Folder	_	Created	l On	Created By	Size
[↓] 🔒 Document Merge	Right Clic	k It	9/23/14	8:43:38 AM	DA	0
MSDS_Sample	Direwi	Copy URL Share 'MSDS_Samp	le.ndf	25:33 PM	VADIMB	86894
[↓] d'Sample2	Attae	Lock File		23:46 PM	VADIMB	70807
[↓] d'SiteView11	Drawi	Check Out		24:17 PM	VADIMB	0

- A. Copy UR: Copy URL for selected file to the buffer for later use.
- B. Share <file name>: Creates the email with link for the attachment to be shared.
- C. Lock File / Unlock File: Locks/unlocks the selected file.
- D. Check In / Check Out: Starts the dialog box to.

I) Select the file for uploading and creating new revision of the selected document or to select place to download the selected attachment – Check In.

II) Select the place to download the selected document – Check Out.

NOTE: if some of the selected documents are locked and some of them are unlocked, the context menu shows both options. When selected, the system applies the locking/unlocking action accordingly:

- Lock File action will be applied to unlocked documents
- Release Lock action will be applied to locked ones only

CMIC ECM					- ×
Search		= A 🕶	T 5	V i	
☆ (ZZ-WA	LMART) ZZ	Walmart			<u> </u>
🖆 Subr	mittals (11)				
🖃 Daily	Journal (4)				
PCI (17)				
Com	munications	; (3)			
((CID0004) Tes	st (4)			
? (0	CID0007) hyr	y (0)			
1	CID0008) au	(0)			
? RFIs	(0)	()			
	(-) es (0)				
园 Doci	iments (/1)				_
- Doct					• •
Name	Folder	Created	On	Created By	Size
Document Merge	Attachment	9/23/14	8:43:38 AM	DA	0
MSDS_Sample	Drawings	Download	25:33 PM	VADIMB	86894
[↓] ■ Sample 2	Attachment	Release Lock	23:46 PM	VADIMB	70807
[↓] SiteView 11	Drawings	Reclassify	24:17 PM	VADIMB	0
		Kename			

Dragging & Dropping Emails & Attachments

Users can drag and drop emails or document attachments from Outlook or the desktop to the CMiC ECM section.

NOTE: The Outlook Plug-In is limited to uploading five files at the same time. If trying to upload more than five files, use the ECM Desktop.

Files

For Enterprise Documents, dragging and dropping a file to a folder adds it to that Imaging Document Type. Doing so to an existing version of the same file creates a **revision** of the file.

For Projects, dragging and dropping a file to the folder creates new PM item with an attachment. The attachment type depends on the Manage Uploads setting in the project context menu. When the same is done on the existing PM item – the new document (the type depends on the Manage Uploads setting) gets added to the item.

Emails

When an email is dragged and dropped to the Image Document Type node in Enterprise Documents, the new document is created in Image Manager.

If it is done to the EMAIL folder (created in Imaging for the emails), the parsing is applied to separate the author, subject, body etc. The email is stored in the system as a PDF.

If an email is dragged and dropped to the PM item node in Projects, the new PM item is created with attachments of the email body in PDF and MSG formats. Email attachments (if any) will be added as well. The attachment's type depends on the Manage Uploads setting.

If an email is uploaded to the existing PM item – new attachments will be added as the document type set in the Manage Uploads setting.

In an email, the orange **CMiC ECM** indicator, shown below, indicates that the email has been brought into the ECM system.

Stephanie Bromfield TEXTURE TESTSANS - deployment at Spin. Texture Textu	
Communications (4) Communications (4	
Communications (4) Commu	
Concerns	
Compositive CECH by: [7] (00000072) Email (no attachment) for testing EV	
Crange (CARC ECNE bar	
	CM (2
indicates the email has been brought to ECM. (00000073) Email with attachment to test ECM	3)
(ISE-028) Email with attachment (3)	
🛛 (ISE-029) TESTV10X, TESTSAAS - deployme	nt at 5
即 Documents (34)	
Attachments (20)	
Audio/Video (1)	
×	>
Name Polder Created On Created On	ted Size
ETESTV100, TESTV100, TESTSAAS - deployment at Spin. Schematics and 11/4/15 3.36(3 VAD)	48 1
[↓] PTESTV10X, TESTSIAAS - deployment at Spm. Attachment 11/4/15 3:36:2 VADI	48 4

The emails with this orange bar can be sorted on Category to get them all grouped together.

Double-click on the PDF in ECM and the interface to CMiC Enterprise (Image Manager) will be displayed after logging in.

NOTE: If a WORD document is dragged and dropped on one of these document types, its changes can later be managed through the WORD Plug-in, described further below.

Project Management Integration

Communications, Submittals, RFIs, Issues and Documents are currently the only PM objects that are integrated into ECM.

Un-submitted RFIs, Issues and Communications can be created through the drag + drop actions. Any attachments on the email will become attachments on the created records.

Communications

Dragging and dropping an email or file on the Communications folder in CMiC ECM will cause an unsubmitted communication record to be created with attachments of the document type based on settings in Manage Uploads.



Communication Log									Submit Upload I	Multiple Add/Upload	New Show Mapping Add Att	tachment ESign Documen	ts Back To Log	₽ ⊡ 4	ล
C D Project Management Menu	Commu	nication Detail					Att	tachments •	(History			^
Search								ot Submitted							
Project: ZZ Walmart (ZZ-WALMART)	Туре	Number	Name		Rev. Number	Rev. Date	Description	Notes	User	Status	Attachment	ESignings	ESign Status	Action	
E Communication Management	Drawings	DR-00242	Communication Record	0	History	05/Nov/2015	(No Description)		Database Admin	SUBMITTED	Communication Record.pdf			<u>S</u>	
- Project Calendar	Drawings	DR-00240	PM3020	0	History	05/Nov/2015	(No Description)		Database Admin	SUBMITTED 2	PM3020.pdf			<u></u>	
- My Actions	Drawings	DR-00241	Communication Record	0	History	05/Nov/2015	(No Description)		Database Admin	SUBMITTED	Communication Record.msg			53	
Outlook ImportExport Project Context Dentor Directory Project Context Directory Dentor Directory Meeting standae Torsmitta Canua Communications Communications Communications CODOD DIDD007 Preve							1 - email 2 - email 3 - email	body in F attachme body in M	PDF format; int; ISG format.						

Double-clicking the document under the Communications folder in the top pane will open the PM JSP interface for the user's single sign-on to CMiC, and will then show the Communication record.

хP	Project Management										Add D	ocument	Import Upload	Multiple Go to Planwell	Show Filter Send To S	preadsheet En	ter Query [
\$ E E	Project Management Menu								Docur	nent: Drawings								
Search	Go		Number	Title	Rev Date	Revision	Status	Last Ref. Code	Uploaded By	Related Object	Copies	Cost Code	Contract Type	Acknowledgement Date	Projmangr	Received	From Contact	To Cont
	_	▲ □	1	Test LOV	05/Dec/2014	0	Open				1 (01			JOVICA MRACEVIC	05/Dec/2014		
E	roject: ZZ Walmart (ZZ-WALMART)		DR-00013	ZZ_V10_t2stt3st	15/Apr/2015	0			Vadim Bogomolov									
66	Communication Management		DR-00014	ZZ (1)	15/Apr/2015	0			Vadim Bogomolov									
	My Actions		DR-00233	SiteView11	05/Nov/2015	0	Open	ref1	Vadim Bogomolov	1								
	Outlook Import/Export	1	DR-00234	SiteView11	05/Nov/2015	0	Open	R1	Vadim Bogomolov									
	Project Partner Directory		DR-00237	PM3020	05/Nov/2015	0			Database Administrator	1								
	Distribution Lists	- n	DR-00238	Communication Record	05/Nov/2015	0			Database Administrator	1								
	Meeting Minutes		DR.00239	Communication Record	05/Nov/2015	0			Database Administrator	1								
	Transmittals		DR 00240	PM2020	05/Nov/2015	0			Database Administrator									
	Transmittals Queue		000240	Organization Decent	05010002015	0			Database Administrator									
1 5	Communications		UR-00241	Communication Record	05/N0W/2015	0			Database Administrator									
	BETA		DR-00242	Communication Record	05/N0V/2015	0			Database Administrator									
ė	C Issues		DR-00245	testfile777	08/Feb/2016	0			Vadim Bogomolov	1								
	L-1 ISS-0013		DR-00246	testfile888	08/Feb/2016	0			Vadim Bogomolov	1								
÷ 🖨	Document Management		DR-00247	Multiple attachments	08/Feb/2016	0			Vadim Bogomolov	1								
	Submittals	4 🗆	DR-00248	TEST/10SAAS - deployment at noon.	08/Feb/2016	0			Vadim Bogomolov	1								
	Besponsibility Log		DR-00249	logo	08/Feb/2016	0			Vadim Bogomolov	1								
	Planroom		DR-00250	Email with attachment to test ECM	08/Feb/2016	0			Vadim Bogomolov	1								
	Procurement Log		DR-00251	Email with attachment to test ECM	08/Feb/2016	0			Vadim Bogomolov	1								
	Submittal Packages		dow001		02/Eeb/2015	0					1					02/Eeb/2015		
1	Documents Attachments	Total (19	(rows)			-												
	Acacimiento																	

Document records are also created in the Document Management - Attachments folder of the same project:

Double-clicking the attachment in the bottom pane will open the attachment in the program it was created in (Excel, Word, and Adobe etc.).

The **Subject** and **Message** fields can be modified in the lower pane of the ECM section when 'Details' mode is on (please refer to the section 3.B of the ECM plug-in interface features).

CMIC ECM - x 🔽 🗩 xod 🍐 🔽 🛨 🍸 🗐 🔍 > 🕒 Submittals (11) > E Daily Journal (4) > PCI (18) $\checkmark \blacksquare$ Communications (2) (CID0004) Test (4) **Right Click** ? (CID0007 > ? RFIs (2) \sim ! Issues (3) (ISS-0010) Communication Record (3) (ISS-0013) Multiple attachments (4) (ISS-0014) TESTV10SAAS - deployment at noon Folde Created O Email with attachment to test ECM.pdf Drawings 2/8/16 4:41:20 ... VADIMB 1 **-** C 1... Drawings 2/8/16 4:41:09 ... VADIMB logo.jpg 1...

Created communication can be submitted from the context menu (right click on the item):





Issues

The Issue object behaves similarly to the Communication object. Fields available for modifications are: **Subject** and **Description**.

RFIs

The default RFI Contact needs to be set for the projects used in ECM, otherwise an error message will be displayed:

CMIC ECM	×
8	Default RFI contact not specified in project setup (Project Maintenance Defaults)
	ОК

The RFI object functions in much the same way that the Communications and Issues objects do, as previously described.

Fields available for modifications are Subject and Question.

Submittals

Submittals are not created from the drag + drop actions, and must be created in the PM module. Email messages dragged and dropped onto a submittal will be created as attachments for the submittal record. The only field available for modification is **Name**.

PCIs & Daily Journals

As with Submittals, PCIs and Daily Journals are not created from drag + drop actions, and must be created in PM. Email messages, as well as files, dragged and dropped onto a PCI or Daily Journal will be created as attachments. There are no fields available for modification for these items.

Documents

Email messages can be dragged and dropped onto Document records as well. When this happens, both an MSG file (representing the original email) and a PDF representation of the email are created as separate document records under the document type to which the email was dragged and dropped. Thereafter, the documents can be used in other PM objects (PCI, Subcontracts, Notices, etc.) as attachments.

Locking & Checking Out Files

Locking

Locking involves the disabling of access and update rights to files by other users. Files can be locked to prevent them from being overwritten by an uploaded revision. Also, if multiple users are expected to update the same file, the file can be temporarily locked by one user while a revision is being applied, to prevent use by other users in the interim.

Locking is available when the ECM flags for IMG or PM are set to the 'On' state. That is when the user will see the Padlock icon \blacksquare .



The red lock (highlighted in the screen print above) allows the user to lock or check-out a file.



When the document is locked in Image Manager, the icon in ECM changes to a lock as well:



Checking Out

🔋 Image Management 🔅				
		Home Refresh Search		-
Types *AI Types 💌 💿				
i Proge ⊡≣enete (1 LECood Friday par				
1.37		Prev Next Upload ImageEsport QueryMode Move Delete 1	Save Submit Uploed Multiple Documents	N A
*	Cocument Name Good Friday.pd	af 🔟	Submit Not Submitted	
Indexed Data	2012 03 27 2 2 2012 03 27 2 Matthew Since@crit.ce omiccompany@crit.ce Just a reminder that Priday, f holday. Monday, April 9th is Easter N Thanke,	Core Check-Out Document To Check-Out Document To Check-Out document, please select the Lock File checkbox and then click Download document without checking it out, ensure that the Lock File checkbox is unchecked. Lock File Download		
	Matthew Simon CMIC «http://www.cmic.ca/» 4850 Keele Street, Toronto, O	Accounts Receivable	×+	<u>.</u>

In Image Manager, the Check-Out feature allows the user to download an attachment. The same applies to Project Management Documents:

					User Exte	view Histo	y Upload Multiple Add [Document Copy Edit F	Delete Print Report Back To Lo
Attachr	nent Detail				Text Codes				
			Number AT	T012 [7	Title RE: Pa	tch testing - 12.73986retu	urned because
Number	Designer Ref.	Revision Date	Received Date	Statu	Close	Attachment		Change #	Action
0		17/Apr/2013			Check-Out Document	86returned beca	usemsg	Create Change Link Change	M Update Packages
					To Uneccuour document, please select the Lock File Checkbox and then click Download document without checking it out, ensure that the Lock File checkbox is unchecked.				+

After the Check-Out action, the icon changes to Check-In:

User Extensions View History Upload Multiple Add Document Copy Edit Delete Print Report Back To Log

Attachm	ient Detail							Text Codes			
			Number ATT	012				Theck-In	Title RE:	Patch testing - 12.73986retu	rned because
Number	Designer Ref.	Revision Date	Received Date	Status	User	Description	Revis Notes	Release	Attachment	Change #	Action
0		17/Apr/2013			Kerrice Bailey	(No Description)		RE Patch testing - 12.	73986returned becausemsg	Create Change Link Change	划 Update Packages
											+

Checking In

User Extensions View History Upload Multiple Add Document Copy Edit Delete Print Report Back To Log Attachment Detail 🔒 🛛 Text Codes Number ATT012 Title RE: Patch testing - 12.73986...returned because. Close Number Designer Ref. Revision Date Received Date Statu Attachment Change # Action **Check-In Document** Create Change Link Change S Update Packages 17/Apr/2013 6...returned because....msg 0 Choose a file to check-in and click the Check-In button. 4 If you want to release the file after checking it in, ensure that the Release checkbox is checked. Browse... Release Check-in

Using Cloud Storage (OneDrive, Drop Box, box)

In version 4, new functionality has been implemented for integration with the following cloud file hosting services: OneDrive, Drop Box and Box.



Upon clicking these buttons, the login window appears to enter credentials (sample of Sing in screen shown below):

CMIC ECM	-	\times
Advanced Search	\$ 🗨	0
► CMIC ECM		
One Drive Authentication		
Sign in		
Use your Microsoft account		
What's this?		
Email or phone		
Password		
Keep me signed in		
Sign in 👻		

When logged in, the user has access to the files stored in the cloud. They appear on the right pane of the Outlook ECM section:

CMIC ECM	~ ×	One Drive				-	\times
Advanced Search 🗸 🗩 🏹 🗇 🗄 (🛆 box 😻 🗨 🕄	Root				5	i 🖘
		One Drive	Name	Last Modified	Creation Date	Size	
							в
			Pictures	1/11/16 8:55:33 PM	1/11/16 8:55:33 PM	0 Bytes	
			Conten On	t stored on eDrive			

The toolbar on cloud storage pane shows the current location:

One Dr	rive			×
Root > Docur	ments			5 5
One Drive	Name	Last Modified	Creation Date	Size
\square	PM3010_2015_09_0901_32_23.pdf	1/11/16 9:04:08 PM	1/11/16 9:03:35 PM	133.46 KB
Cu 'Do	rrently user is in ocuments' foder			

And it has two controls:

- navigates one level up.
 - navigates between cloud storage drives (if connected).

From cloud storage, the files can be sent to CMiC:

- Select files (multiple selection can be used as well)
- Right click and then click the [Send to CMiC] button
- Choose the destination project and click [Proceed]

• Select the type of the documents for the files and click [Move Documents], as shown at the bottom of the last screenshot:



• Selected files will be sent to CMiC:

Project Management			Add D	ocument Import Upload Multiple Show F
S 🕀 🗈 🔹 Project Management Menu		Document: Attachmen	ıt	
Search	Attachment #	Title	Change Date	Uploaded By
	▲ ATT-00002	test	2011-09-20	DA User
Project: Co ZZ Default Project (ZZ-WMT)	ATT-00003	1	2011-09-20	DA User
Communication Management Depicet Colorder	ATT-00111	Upload	2012-06-13	CMiC Lab User 01 Lab 01
My Actions	▲ ATT-00112	JIW8 2	2012-06-18	CMiC Lab User 01 Lab 01
Outlook Import/Export	ATT-00113	Best Practices for monitoring VMware with SCOM	2012-06-22	CMiC Lab User 01 Lab 01
	ATT-08274	testfile	2016-02-05	Test User
Project Contact Directory	ATT-08275	testfile3	2016-02-05	Test User
Distribution Lists	 ATT-08276 	testfile5	2016-02-05	Test User
Transmittals	ATT-08277	testfile2	2016-02-05	Test User
Transmittals Queue	4 ATT-08278	testfile (1)	2016-02-05	Test User
- Communications	Total (10 rows)			
Issues				
Submittals				
Collaborator Submittals				
Responsibility Log		Files 'testfile' and 'testfile2' have been sent from		
Procurement Log		the cloud storage to CMIC.		
Submittal Packages				
Documents				
Bidding Documents				
Drawings				
- Mechanical				

Settings Menu

Server - Tab

SETTINGS MENU								
Server	Enter Login De	tails						
Notifications	Tenant ID	Enter CMiC Tenant ID						
Proxy	Username	testuser						
	Password	•••••••••						
Sync	Server 1	http://v10xsandboxwls.cmic360.com/cmicprod/MSPluginWebService/MSPlugin/MSPlugin						
RFI	Server 2	http://test4v10.cmic.ca:7785/cmictestv10x/MSPluginWebService/MSPlugin/MSPluginWS/						
Email	Server 3							
		Save						

User can setup the service URL for different servers. By setting the checkbox (this is single selection checkbox) on the right side of the screen the user chooses the server to be connected to.

Notifications - Tab

SETTINGS MENU							
Server	Pull Notifications						
Notifications	Frequency(in min) 5						
Proxy	Save						
Sync							
RFI							
Email							

This tab is used to set the frequency of checks for new notifications.

Proxy - Tab

		SETTINGS MENU	X
Server	Proxy Server Settings		
Notifications	Server IP		
	Port		
Proxy	Username		
Sync	Password		
RFI	Enable Proxy		
Email		Save	

This tab is used to store the proxy server information (if required).

To make fields editable, check the **Enable Proxy** checkbox.

Sync-Tab

	SETTINGS MENU	Х
Server	Revision Synchronization	
Notifications	Enable server auto renaming:	
Proxy		
Sync		
RFI		
Email		

When checked the server uses masks setup in the CMiC to rename uploaded documents.

RFI – Tab

	SETTINGS MENU	\times
Server	RFI Creation Setting	
Notifications	Use Project's Contact Codes For RFI creation:	
Proxy		
Sync		
RFI		
Email		

When checked, the RFI contact set in the Project defaults will be used for new RFIs:

Project Maintena	ince								Masks	Check Spelling Save Cancel	2 🖬 🏟
💠 🗉 🗉 🔹 Project Management Menu	u .					Project					
Search Go	\sim	Compar	y CMIC Test Company MC					Project 0	Code ZZ-WMT		
		Project Name	Co ZZ Default Project					Project Contr	rol Code ALL		
Communication Management	MMTD *	General	Key Players	Job Info	Defaults	Security	Notes	Attachments		Review/Approval	
Project Calendar	1					Purchasing					
Outlook Import/Export		Default Bill To Address			Defa	Default Ship To Address					^
Project Partner Directory Project Contact Directory		Default Delivery	Period			Default Requestor				Default Buyer	
Test User						Other					
Distribution Lists Meeting Minutes		RFI	Contact ZZ		Default	RFQ Review Period					
- Transmittals		Default Issue Review	Period Use Wor	king Days	Default N	lotice Review Period	Use Working Days				
Transmittals Queue Communications		Punchlist Completion	Period Use Wor	king Days	Default	t RFI Review Period	Use Working Days				
RFI's		Use Working Days For OC	O Date 🖌		Use Original Contract Amour	nt Override On OCO					
Document Management Ortractor Prequalification		Submittal (Contact ZZ	A		Submittal Approver	A	*	Auto Populate Transm	ittal From Submittal	
Email – Tab



When checked, the selected files will be archived and attached to emails as ZIP files (see the *Detail Pane* section).

CMIC ECM in MS WORD

Overview – ECM in Word

The WORD Plug-in is meant to be used with versions above Microsoft Word 2003.



It provides an interface between CMiC objects (namely from Project Management JSP) and Microsoft Word, allowing the creation, modification and storage of documents within CMiC to produce multiple revisions and at the same time retaining the original document.

Activating the WORD Plug-In

Open WORD. The icon will be displayed in the Toolbar. The Tooltip will show that it is the CMiC Word Plug-in and the plug-in version.

Click this icon to show the next icon which is separated into two parts - the diskette part allows the user to save the document without any additional saving options, and also displays the WORD plug-in version that is in use.



The second part, **Save in CMiC ECM**, has a drop-down arrow. Click on it to expand to the additional menu options beneath:



Click **[Connection Settings]** to set the Username, Password and Service URL for the environment (TEST/PROD etc.) that you will be working in:

•	Server Set	tings	×
S	erver Details	Proxy Details	
F	Please enter t	he details to connect with CMiC ECM Reposito	лy
	Enter the Lo	ogin Details	1
	Username:	Enter CMiC User ID	
	Password:	Enter CMiC password	
	Service UR	L: http://test4v10.cmic.ca:7785/cmictestv1(
		OK Cancel]

Click [OK].

If the connection parameters are not correct, the system will inform the user later when the user tries to make updates during saving actions.

Activating the Document Types

When Microsoft Word is opened after installing the plug-in, the Document Types are not initially shown (see 'Save As'). To get the Document Types active, open or print a PM object (Communications, RFI, PCI, Subcontract etc.) using an associated CMiC word template (created using the Microsoft Integration Package feature) in the CMiC Project Management module.

After printing, a record is created in the Attachments tab and Attachments folder (Document Management) by default. This is a copy of the original printed document.

If a WORD document was previously dragged into the Imaging Document Types folders of the CMiC Outlook plug-in, when the user double clicks on the document in the bottom pane of Outlook, it will open up in WORD, and the document types for Imaging will display:

CMIC ECM					▼ x
			Enter text to search:	Patch	9
CMiC ECM Fiterprise Documents PM ATTACHMENT (0) PM DRAWINGS (0) PM LEGAL (0) PM MEDIA (1) PM TECHNICAL (1) RAD Registered Pay Request (2) Projects Couble-click on any to open up in WC	(R1) revision DRD	WORD do Docu	cument dragged ment Type - PM T	into Imaging echnical	
Name	Created On	Created By	Size (KB)		
00- Ticket Adjustment testing - (R1)	4/17/2013 1:5	SMUSER6	196		
00- Ticket Adjustment testing -	4/17/2013 1:5	SMUSER6	194		

The Imaging Document Types will show:



Opening Existing Documents

When opening an existing document, even more options are available. The 'Save As' option will show a submenu of Document Types if the current document was previously modified and saved with active Document Types.

Saving 'As New Document or Revision'

After making changes to an original document the document can be:

- a) saved As New Document
- b) saved As New Revision

Both the original document and the revision are saved to the PM object.

Using the 'Save As' Option

'Save As' allows the user to select the Document Type to which he wants the document saved.



Document Locking



Locking allows the user to secure the document from unauthorized personnel.

Locking prevents multiple users with authorization from modifying the same document at the same time.



Once a lock is affected by one user, other users can only display or download the document.

When the document is saved the lock is automatically released.

Integration with Imaging

Word documents opened from Imaging have the similar integration as Project Management. As already said above, any WORD file that was dragged to an Imaging Document Type can be modified using the WORD plug-in to create revisions and to lock them if necessary. The user can place a lock on the file while it is being modified. Revisions can be created.

CMiC Search & Indexer

Overview – CMiC Search & Indexer

CMiC Search and CMiC Indexer are components of the Electronic Content Management module.

CMiC Indexer creates and updates the index files (scheduled or manually) for the selected types of documents on its **Document Types And Logs** tab. CMiC Search then uses the index files to perform searches.

CMiC Indexer

CMiC Indexer is used to rebuild indexes when changes have been made to the database's contents, and it is used to improve search performance by selecting which Enterprise, Project and Log document types get searched against. The less documents types there are to index and search against, the faster indexing jobs and searches are performed.

Launch the indexer by typing the following URL in a browser, or by manually adding it to your Treeview. For instructions on how to add a link to a Treeview, please refer to the *V10xTOOLS ADF - UI Treeview Builder.doc* reference guide.

http://<SERVER>:<PORT>/cmic<ENVIRONMENT>/CmicIndexer/indexer.do

The Single Sign-On screen is displayed to log in to the system. Enter your login credentials.

The indexer's **Controls** tab is the main tab from which the indexer is executed and monitored, and the **Document Types And Logs** tab is used to select which document types get indexed and searched against. Before running the indexer, ensure the required documents types are selected via the **Document Types And Logs** tab.

Controls – Tab

CMIC INDEXER				
Controls Document Types And Logs				
INDEXER CONTROLS				
Create Scheduler and Start Indexer Stand by	Stop Scheduler and Indexer Recr	reate Indexes		
JOB CONTROLS				
Schedule Jobs Pause Resume				
CHANGE INTERVAL				
* Select a job from list to reset its interval. Logs Indexing V (In Minutes) Reset Interv				
CURRENT JOBS INFORMATION				
Current Time: Wed Jun 14 09:26:22 EDT 2017 Scheduler State: Running				
Group Job	Interval(in Minutes)	Previous Run Time	Next Run Time.	Job Running Status
CMIC DOCS	30	Wed Jun 14 09:17:44 EDT 2017	Wed Jun 14 09:47:44 EDT 2017	NO
CMIC LOGS	30	Wed Jun 14 09:17:44 EDT 2017	Wed Jun 14 09:47:44 EDT 2017	YES (1)
Indexer Jobs: DC	CS, LOGS			

Sample of CMiC Indexer's Controls tab.

Indexer Jobs & Scheduler

Indexer Jobs

Indexer Jobs are what create the index files used by the CMiC Search application to search for text within the documents and PM Logs of the types selected on the **Document Types And Logs** tab.

There are two Indexer Jobs, one for the documents in PM and Enterprise and one for PM Logs. As shown in the above screenshot, the **Current Jobs Information** section lists the two Indexer Jobs, if they are scheduled to run:

I. DOCS

Creates index file for documents of the types selected under the **Enterprise Document Types** and **Project Document Types** sections on the **Document Types And Logs** tab.

II. LOGS

Creates index file for PM Logs of the types selected under the **Project Logs** section on the **Document Types And Logs** tab.

Scheduler

When activated, the Scheduler runs the Indexer Jobs at regular intervals. The duration of the interval for each Indexer Job is specified in the **Change Interval** section.

If the Scheduler is active, the **Current Jobs Information** section shows the two Indexer Jobs (**DOCS**, **LOGS**), their intervals and their current statuses.

NOTE: Click the **Refresh Job Information** link in the **Current Jobs Information** section to ensure that current details are shown.

Setting Up Scheduler to Run Indexer Jobs - Overview

This overview is about setting up the Scheduler to run the two Indexer Jobs when no Scheduler is active. The Scheduler is inactive if the [Create Scheduler and Start Indexer] button is enabled and the Current Jobs Information section does not show the two Indexer Jobs (DOCS, LOGS) and their intervals.

Part 1: Indexer Controls – Section

Click the [Create Scheduler and Start Indexer] button to activate the Scheduler.

Part 2: Job Controls - Section

Click the [Schedule Jobs] button to add the two Indexer Jobs (DOCS, LOGS) to the Scheduler. The scheduled Indexer Jobs will appear in the **Current Jobs Information** section with details about them. By default, the two Indexer Jobs are set to run by the Scheduler every 30 minutes.

Part 3: Change Interval - Section

The **Change Interval** section is used to set the interval of time between the running of an Indexer Job by the Scheduler. To set an Indexer Job's interval, select the Indexer Job from the dropdown list and enter its interval (in minutes) in the corresponding field.

Part 4: Current Jobs Information - Section

This section displays details about the currently scheduled Indexer Jobs.

NOTE: Click the **Refresh Job Information** link in this section to ensure that current details are shown.

Indexer Controls – Section

INDEXER CONTROLS			
Create Scheduler and Start Indexer	Stand by	Stop Scheduler and Indexer	Recreate Indexes

This section is used to start the Scheduler, to stop it, or to put it in Standby mode.

[Create Scheduler and Start Indexer] - Button

This button is used to activate the Scheduler, in order to add the two Indexing Jobs to it by clicking the [Schedule Jobs] button in the Job Controls section. If the Scheduler is active, this button is disabled.

[Stand By] - Button

This button is used to put the Scheduler in Standby mode. If an Indexing Job is running, it will be allowed to finish. In Standby mode, the Scheduler will not run the Indexer Jobs again until the [**Start**] button (available when Scheduler is in Standby mode) is clicked.

[Stop Scheduler and Indexer] - Button

This button stops the Scheduler and deletes the Indexer Jobs set up for it, reverting it back to its initial state.

[Recreate Indexes] - Button

This button deletes and recreates the index files from scratch, instead of just updating the index files based on recent changes, as it does after the index files have been initially created (Indexer Jobs run faster after initial run). This is required if any errors occur that would require the index files to be created from scratch.

Job Controls – Section

JOB CONTROLS		
Schedule Jobs	Pause	Resume

[Schedule Jobs] – Button

This button adds the two Indexer Jobs (**DOCS**, **LOGS**) to the Scheduler. Upon clicking, the scheduled Indexer Jobs will appear in the **Current Jobs Information** section with details about them. By default, the two Indexer Jobs are set to run by the Scheduler every 30 minutes.

This button is disabled if the Indexer Jobs have already been added to the Scheduler.

[Pause] - Button

This button pauses the currently scheduled Indexer Jobs.

[Resume] - Button

This button is enabled when the Indexer Jobs are paused, to resume them.

Changing Interval – Section

CHANGE INTE	RVAL				
* Select a Logs Index	ob from list to	reset its interval. (In Minutes)	Reset Interval		

This section is used to set the interval of time between the running of an Indexer Job by the Scheduler. To set an Indexer Job's interval, select the Indexer Job from the dropdown list and enter its interval (in minutes) in the corresponding field. Click the [**Reset Interval**] button to commit the change.

For both Indexer Jobs, their interval is displayed by the **Interval (In Minutes)** column in the **Current Jobs Information** section (note, click the section's **Refresh Job Information** link to ensure that current details are displayed).

Current Jobs Information – Section

Current Time: Fri Aug 11 J Scheduler State: Running	1ATION				
Group	Job	Interval(in Minutes)	Previous Run Time	Next Run Time.	Job Running Status
CMIC	DOCS	30	Fri Aug 11 11:20:40 EDT 2017	Fri Aug 11 11:50:40 EDT 2017	NO
CMIC	LOGS	30	Fri Aug 11 11:20:40 EDT 2017	Fri Aug 11 11:50:40 EDT 2017	YES (1)
Refresh Job Information	T Indexer Jobs: DOCS, L(OGS			
Get Indexing Data Inform	ation				

If the Scheduler has had the Indexer Jobs added to it, they will be shown in the **Job** column in this section, as shown above.

If an Indexer Job is running, its corresponding **Job Running Status** field (last column) displays "**Yes** (1)", as shown above. When an Indexer Job has finished, the **Job Running Status** field displays "**NO**".

The **Interval (In Minutes)** field displays the interval between the running of an Indexer Job by the Scheduler. By default, the intervals are set to 30 minutes.

Refresh Job Information - Link

This link is used to refresh this section's information. This link should be clicked whenever you wish to have current information.

Get Indexing Data Information - Link

Indexing Data Information	=
Documents	
Enterprise Documents	71623
Project Documents	60521
LOGS (406425)	
Log	Count
Access Code	143
Action Items	234
Addendum	35
Administration Action	0
Annual Review	0
Applicant	34
Applicant Information	117
Application Action	159
Applications Log	23
Auto Cold Storage Definitions	11
Bid Package (Owners)	438

This link's popup displays the total number of **Enterprise Documents** and **Project Documents** in the system under the **Documents** section, and it displays how many records there are for each Log type under the **Logs** section. Note, the **Logs** section's header displays the total number of Log records in the system.

This information can be used to get a sense of how much work the Indexer Jobs have to do, and it can be used with the **Document Types And Logs** tab to help optimize the Indexer Jobs.

Document Types And Logs - Tab

CMIC INDEXER						
Controls Document Types And Logs						
ENTERPRISE DOCUMENT TYP	ES					
* Select the Enterprise do	cument Type for Indexing. efresh Indexes					
OMC GL Transaction SC RFP Invoice Registered Invoice Rab Invoice RAD Invoice RAD Registered Pay Re PM DRAWINGS Job PtCtures PO Entry	y y quest y y v	PM Attachment CMC JC Transaction RAD Subcontract Keth AP Reg Invoice Emais PM SCHEMATICS Uncategorized Document AP Registered Invoices RAVI	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Check Doc UETD AP Invoices Registered Pay Request Multi Register Pay Request Bahaj Voucher Pay Requests SC Pay Request - Voucher SS - JC transaction RV AR Invoice	V V V V	CMC AP Invoice AP Registered Invoice RAVI PO Invoices Registered Pay Request Invoices CMC AR Invoice Sub RFP Balaj AP Reg Invoice
PROJECT DOCUMENT TYPES						
* Select the Project docur Select Al I Test for issue 14.9168 I Doc7	nent Type for Indexing. efresh Indexes 3 V V	Audio/Video Drawings	V	Fnancial Documents from Prequal Attachment	V V	Schematics and Blueprints Photos
PROJECT LOGS						
* Select the Project Logs	ndexing. efresh Indexes					
Access Code Action Rems Applcant Bid Packages Buyout Rems Compliance Status Cost Status Query (Ca	(V) (V) (V) (V) (V) (V) (V) (V) (V) (V)	Addendum Applicant Information Bidder Response Log Class Enrollment Contacts Course Enrollment	2 2 2 3 5 5 7	Administration Action Application Action Budget Status Query Collaborator Submittals Contract Forecasting Customized Issues Log Dubus Researchers Market Merce	V V V V V	Annual Review Applications Log Budget Status Query (Category) Communications Cost Status Query Daily Journal Costs Docement Parkane

Sample of CMiC Indexer's Document Types And Logs tab.

The **Document Types And Logs** tab is used to select which document and PM Log types are to be indexed, and thus, which document types and Logs are searchable via CMiC Search.

The **Enterprise Document Types** section lists the document types in Enterprise, the **Project Document Types** section lists the types of documents in the Project Management module, and the **Project Logs** section lists the PM Log types in the Project Management module.

After making changes, click the corresponding [Refresh Indexes] button to commit them.

NOTE: The Indexer should be restarted after application server restart.

CMiC Search

Projects	Logs V Search	Default	~	Sort 💙	From Date	To Date	#	Q
Project Docs								
Enterprise Docs								
▶ Logs								
Projects								
€Create Binders								

Launch CMiC Search by typing the following URL in a new browser session or manually add it to the Treeview.

http://<SERVER>:<PORT>/cmic<ENVIRONMENT>/CMiCSearch/CMiCSearch.do

The Single Sign-On screen is displayed to log into the system. Enter your login credentials.

Search Filters

Projects 🔻 Project Docs 🔻 Logs 🔻 Search Default 🗸 Sort 🖌 From Date 🚞 To Date												
	Projects 🔻	Project Docs 🔻	Logs 🔻	Search	Default	\sim	Sort 🛩	From Date	Ħ	To Date		Q

Searches can be performed against Projects, indexed PM Document types, and indexed PM Logs using the **Projects**, **Project Docs** and **Logs** dropdown filters on the ribbon, as shown above.

After selecting which Projects, PM Documents and PM Logs to search against, the selections are displayed under the blue ribbon (shown below), and they can be deleted by clicking their corresponding Trash icon.

Projects ▼ Project Docs ▼ Logs ▼ Search	Default	✓ Sort ♥	From Date		To Date		Q
Projects : # 1 - Opportunity 👚 Projects : # 2 test 📋 Projects : # 8 🍵 Projects : # 5 🍵 Document Types : Audio	lideo 📋	Document Types : Created in	ADF 💼	Document	t Types : Attachmen	t 🗊	t
Logs : VBDefineLog 📋 Logs : Vendor Prequalification - Applicants 📋 Logs : Vendor Prequalification - Partners 📋 Logs : Wo	k Orders						

NOTE: The Projects filter is not applied to PM Log searches.

Search Mode

Default		Sort 🗸	From Date
Default File Names C All Files	Only	Ente	erprise Documents

Search Mode	Details
Default	Search file names as well as file contents – applicable to PM Documents and Enterprise Documents.
File Names Only	Search file names only – applicable to PM Documents and Enterprise Documents.
All Files	Search for matching files in selected Projects from the Projects filter.

Sort



Search results can be sorted by relevance, by upload dates, project names or by titles.

From Date, To Date



Use the From Date and To Date fields to filter search results by upload dates.

Searching

Enter the search text in the **Search** field and hit Enter or click the Search icon (magnifying glass) at the end of the blue ribbon.

Search results, if any, will be categorized appropriately and available via the **Project Docs**, **Enterprise Docs**, **Logs** and **Projects** categories on the screen's left pane, as shown above.

For example, if the search text "**ceiling+installation**" is entered, the result would show the following, with matched terms highlighted in grey:

Projects Project Docs Logs	ceiling+installation	Default	Sort 💙 From Date 🗮 1	To Date 🗮 🔍		
Results (31)	Top Hits	Project Documents	Enterprise Documents	Logs		
Project Documents (3)	, , , , , , , , , , , , , , , , , , ,					
Enterprise Documents (4)						
► Logs (24)	Created on 2013-02-04 by V	√adim Bogomolov (896 Bytes)		Once building's Renovation - Attachment		
Projects (3)	installation_NA,S.,90000,LABOUR,SUBCONS					
Create Binders				test for aztest001 ▶ Photos		
	Created on 2012-11-20 by V	20 by Vadim Bogomolov (3.0 KB)				
	","75,000.00","75,000.000",, installation",."NA",,,"S	.,,,,, ,"Y","Y","N","N","21","2005"," <mark>Ceiling insta</mark> l	lation",,"NA",,,"S",,"1.000","150,000.00","150,000	.000",,,,,,, ,"Y","Y","N",,"20","2004","Walls		
	photo10			Testing Facility Construction ► Photos		
Created on 2012-11-20 by Vadim Bogomolov (3.0 KB)				000" "V" "V" "N" "20" "2004" "W/alle		
	installation",,"NA",,,"S					

NOTE: When searching for a phrase, use '+' to replace space between words.

Clicking on a document type causes its sub-types to be listed under it, and the search results to be displayed in the screen's right pane. Clicking on a sub-type causes its search results to be displayed in the right pane.

Projects Project Docs Logs	ceiling+inst	allation		Default	✓ Sort ❤	From Date	To Date	E Q	
Results (31)	Top Hits		Project Documents		Enterpri	se Documents		Logs	
 Project Documents (3) 	Attachment	(1)							
Attachment (1)	×	Proi004						Office Building's Renovati	ion Attachment
Photos (2)	Proj004 Crince duidings R Created on 2013-02-04 by Vadim Bogomolov (896 Bytes)				onice banangerteneraa				
Enterprise Documents (4)	installation, NA, S., 90000LABOUR, SUBCONSJOB000001,								
► Logs (24)									
Projects (3)	Jump to L								
Create Binders									

Clicking on a document icon or title allows you to download the document. Clicking the text under the "**Created on**" date information opens the record in the appropriate Enterprise screen.

Create Binders

Projects Project Docs Logs	Search	Default	Sort 💙 From Date 🗮 To Date	= Q
Project Docs	Top Hits	Project Documents	Enterprise Documents	Logs
Enterprise Docs	Documents (5)			
▶ Logs	PDF to test ecm search			PROMENA
Projects	Created on 2017-01-10 by mary mandez (84.0 KB)			
Ocreate Binders	TXT testfile777			PROMENADE

The [**Create Binders**] button is used to create a zip file of the selected documents from the search results, and it is applicable to PM Documents and Enterprise Documents. Use the checkbox that appears after clicking this button to select which files to include in the zip file:

Projects Project Docs Logs	search	Default	Sort Y From Date	o Date 🗮 🔍
Results (13)	Top Hits	Project Documents	Enterprise Documents	Logs
Project Documents (3)	Decuments (5)			
Enterprise Documents (2)	PDF to test ecm search	When [Create Binderl button is	PROMENADE MALL > Drawing
► Logs (8)	Created on 2017-01-10 by m	ary mandez (84.0 KB) clicked yellow)	the checkboxes (highlighted appear on the left of the	
 Projects (3) 	DT testfile777	search the doct	uments for the extraction.	PROMENADE MALL > Attachment
Proceed	Created on 2016-02-23 by m	ary mandez (110 Bytes)	ilename MyKeyWord for search	
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Click [Proceed], and you will be asked whether you want to open or save the extracted files:

Projects Project Docs Logs	s V search	Default	Sort 💙 From Date 🗮 To Date	≡ Q
Results (13)	Top Hits	Project Documents	Enterprise Documents	Logs
Project Documents (3)	Documents (5)			
Enterprise Documents (2)	PDF to test ecm search			PROMENADE MALL > Drawing
► Logs (8)	Created on 2017-01-10 by m	ary mandez (84.0 KB)		
Projects (3)				PROMENADE MALL > Attachment
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S Cancel			ane. Myreyword for search	
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Upon [Proceed] the selected documents will be archived	Do you want to open or save extracted-files.zip (521	bytes) from saasv10x.cmic.ca?	Open Save 🔻 Cancel	×

Auto Cold Storage (ACS)

Overview – Auto Cold Storage

Auto Cold Storage generates and stores PDF documents, based on a print event definition. It can be run on demand or on a scheduled basis.

NOTE: The current version works with Oracle reports only.

Auto Cold Storage Setup

Commands to Manage Auto Cold Storage on Server

NOTE: These commands are likely only relevant to IT personnel.

The following are commands to start and stop Auto Cold Storage on its server, and to check its status.

First, the path to the server running Auto Cold Storage is required, as this path is used to create these commands. Here, this path is symbolized as *<Serverpath>*, which would be something like, http://...

The following are commands to control the running of Auto Cold Storage on its server:

Start Scheduler

<Serverpath>/SysRptParams/Schedule.do?start

Start Scheduler with Interval

Interval, specified by following *<Integer>* replacement field, is in minutes, with 5 minutes being the default:

<Serverpath>/SysRptParams/Schedule.do?start&interval=<Integer>

Stop Scheduler

<Serverpath>/SysRptParams/Schedule.do?stop

Get Status of Scheduler

<Serverpath>/SysRptParams/Schedule.do?status

Defining Triggers for Automatic Report Generation

The following are instructions on how to define Auto Cold Storage triggers to automate the generation of a particular report, using the Project Management module's RFIs (RFI VBP-13) as an example:

xP	Request for Informatio	n		LiveCycle RFI Send I/O Ema	il Add Copy Edit Delete Submit Add Note Print-Report Link-to-Issue B	ack To Log 🛛 🕻 🗈 🍙
\$ E E	Project Management Menu	RFI Detail	Attachments	Related Objects	History	
Search	Go			Not Submitted		
e 🍋 Pro	oject: Testing (MES007) Communication Management Project Calendar My Actions Outlook Import/Export	RFI No. VBP-13 From Christopher Holme Co-Author To Adam Halkovic	s		Status Pending Submitted Co-Author RFI No. Received	
	Project Partner Directory Project Contact Directory Distribution Lists Meeting Minutes Transmitals	Subject: Request for materi Date Created 09/Sep/2015	al MSDS	nternet Explorer, optimized for Bing and	Change_# Date Required 09/Sep/2015	
	Transmittals Queue Communications RFI's Issues	Source Question Suggestion Cost Impact Potentially	Print Multiple Form-Lo Group By Report Type: Report Name Record	etter stfor information Record	Request for Information Record - InteX	
	Collaborator Submittals Collaborator Submittals Responsibility Log Plannoom Provingment Log	Answered By Date Answered Answered Cost Immert Botestially		Print Close	Print Server testv10x Destination Preview with Cold Storage Name Printer	
	Submitle Packages Documents Document Packages Subcontractor Prequalification Subcontractors	Schedule Impact Potentially Activity			Format Fe's Total Odd Storage Freierred Contact Method	

Step 1: Enter Report's Cold Storage Information

I) Run the desired report, and in the Report Configuration pop-up, select "Cold Storage" for the Destination field, as shown in the above screenshot, and click [Run Report].

Cold Storage Information - Internet Explorer, optimized f					
Attp://test4v10.cmic	.ca:7785/cmictestv10x/SysRptParams/showColdStorage.(
C	old Storage Information				
Document Type	PM SCHEMATICS				
Document Name	PM3010_2015_09_0910_58_4				
Report ID	PM3010-16				
Report Title	RFI Report				
Description	Request for MSDS				
	Back Send Auto				
	*				

II) In the Cold Storage Information pop-up, as shown above, fill out the required information for the report and click the [**Auto**] button.

Step 2: Define Triggers to Generate Report

Auto Cold Storage Definition - Internet Evoluter, optimized for Ring and MSN		C Auto Cald Classes Definition - Tatament Evolution antimized for Directory (MCD)
A http://ket4u10.cm/.ca/7785/mirteshu10v/SusauhColdStryana/eaueauthDenvet.do28eerver=teshu10v8deefvrmat=DDE8ren.veiue.load	=no8dorTune=142052	C Auto Construing o emission interfere exporter, optimized not high and resin
Create Trigger Edit s	acs.delete Close	Carrel Save
Auto Cold Storage Definition		Auto Cold Storage Definition
Record Oraseg 8313293		Depart crossies undets bigaar Table
Report creation update trigger Table		Report d'eauer update arguer raue
Trigger Table - Change column name		Trigger Table - Change column name
From Value		From Value
To Value		To Value
Document type PM SCHEMATICS		
Report File Name PM3010_2015_09_0911_04_48		Document type PM SCHEMATICS
Cold Storage Report Id PM3010-16		Report File Name PM3010_2015_09_09_11_04_48
Cold Storage Report Title RFI Report		Cold Storage Depart 10 DM2010 16
Cold Storage Report Description Request for MSDS		Cold Solvage Report to PH0010-10
Trigger table - Object Oraseq column		Cold Storage Report Title [RFI Report
Trigger table - Project Oraseq column		Cold Storage Report Description Request for MSDS
Trigger table - Company Code column		Trinner table - Object Oracean column
Trigger table - Object ID column		
Trigger table - Job code column		Trigger table - Project Oraseq column
Form Letter Type Code		Trigger table - Company Code column
Form Letter Report Code		Trionar table - Object TD column
Report File Name PM3010		
Report Name PM3010		Trigger table - Job code column
Report Server Name testvilux		Report File Name PM3010
Data Coject Type Core MikH		Report Name PM3010
Optional template for word merge		
		Report Server Name [testv10x
Denot-marific Darameters		Data Object Type Code PMRFI
15 09 09 11 04 486reportid=PM3010-		Optional template for word merce
165reporttitle=RFI%		
Active		active

I) Click [**Edit**] in the Auto Cold Storage Definition window that pops up to switch it to Edit mode. With the window in Edit mode, as shown on the right, fill in the required (highlighted) configuration fields to define the trigger for automatic report generation. The following are descriptions for the required configuration fields:

Report creation update trigger Table

Select the table where updates are to trigger the generation of the report.

Trigger Table - Change column name

Select the column to trigger the report's generation when its values changes.

From Value, To Value

This range is optional. When the value for the specified column changes, within this specified range, the report will be generated. Refer to the following sub-section, How the Auto Cold Storage Definition Affects the Trigger Logic for further details.

Trigger table - Object Oraseq column, Trigger table - Project Oraseq column, Trigger table - Company Code column, Trigger table - Object ID column, Trigger table - Job code column

If applicable, selections may also be required for these configuration fields. Refer to the following screenshot for an example of selected values for these fields.

Auto Cold Storage Definition - Internet	Explorer, optimized for Bing and MSN	
Attp://test4v10.cmic.ca:7785/cmictestv10x/S	SysAutoColdStorage/saveAutoReport.do?&server	=testv10x&desformat=PDF&recursive_load=no&docType=142052
		Cancel Save
	Auto Cold Storage Definition	
Report creation update trigger Table	PMRFI 🔺	
Trigger Table - Change column name	PMRFI_ANSWER	
From Value		
To Value		
Document type	PM SCHEMATICS	
Report File Name	PM3010_2015_09_0911_04_48	
Cold Storage Report Id	PM3010-16	
Cold Storage Report Title	RFI Report	
Cold Storage Report Description	Request for MSDS	
Trigger table - Object Oraseq column	PMRFI_RFI_ORASEQ	
Trigger table - Project Oraseq column	PMRFI_PROJ_ORASEQ	
Trigger table - Company Code column	PMRFI_COMP_CODE	
Trigger table - Object ID column	PMRFI_REF_ID	
Trigger table - Job code column		
Report File Name	PM3010	
Report Name	PM3010	
Report Server Name	testv10x	
Data Object Type Code	PMRFI	
Optional template for word merge		
Active	\checkmark	

The following screenshot illustrates an example of a trigger definition that generates the specified report when an RFI gets marked as answered:

How Auto Cold Storage Definition Affects Trigger Logic

Auto C	Cold Storage Trigger	Values of the Column in the Updated Table					
Old Column Value	New Column Value	Launch Workflow When Old Column Value Is	and New Column Value Is				
Null	Null	Null	Not null				
Null	Specified value	Null	Specified value				
Null	Specified value	Anything except the specified value	Specified value				
Old value	New value	Old value	New value				

Please note that the assumption in the last case is that the old and new values specified in the setup are different. If they are the same, any update to the table will launch the workflow. This is clearly not desirable, so we may add validation logic to prevent such a setup. There is currently no way to trigger a workflow when a column becomes null.



II) Click [Save] and then click the [Create Trigger] button. The following confirmation message appears:

Upon clicking **[OK]**, a new Trigger Definition record appears in the Auto Cold Storage Definitions log screen, in the File Maintenance node of the Treeview, as shown in the left pane of the below screenshot. To customize the column headers, their order and visibility, the Auto Cold Storage Definitions Log Builder screen is used. Please refer to the following *Log Builder for Auto Cold Storage Definitions* section for additional details.

Project Management											Show Filter Send To S	ipreadsheet Enter Query		â
Project Management Menu						Auto Cold Sto	rage Defin	itions						
Search	Trigger table	Trigger Column			Document Type		Report ID	Report Title	Description			Company Code	Report Type R	Repor
- Project: Testing (MES007)	PMCOMMUNICATION	PMCOM_RECORD_STATUS	PENDING	SUBMITTED	PM TEST	PM3020_2015_09_0910_34_57	PM3020-7	Comm	To test	PMCOM_COMM_ORASEC	PMCOM_PROJ_ORASEQ	PMCOM_COMP_CODE		
Communication Management Document Management Subcontractor Precueification	PMRFI	PMRFI_ANSWER			PM SCHEMATICS	PM3010_2015_09_0911_04_48	PM3010- 16	RFI Report	Request for MSDS	PMRFI_RFI_ORASEQ	PMRFI_PROJ_ORASEQ	PMRFI_COMP_CODE		
Bid Management Budoet & Cost Management	PMRFI	PMRFI_ANSWER			PM TEST	PM3010_2015_09_0815_09_13	PM3010- 15	for testing ACS	Testing ACS	PMRFI_RFI_ORASEQ	PMRFI_PROJ_ORASEQ	PMRFI_COMP_CODE	_	
E 🗀 Site Management					PM SCHEMATICS	SYSRPDOC_2015_06_1112_57_32	SCMAST- 7996474	 Document Merge 					FLPM2040 PM	M204
Reports User-Defined Logs					PM Attachment	SYSRPDOC_2015_06_1113_18_08	SCMAST- 7996474	Report to test ACS					FLPM2030 PM	M203
Generation State Generation					PM SCHEMATICS	SYSRPDOC_2015_04_1016_22_13	SCMAST- 7859914	Document Merge	sb- 14.94616 - CS Auto				FLPM2040 PM	M204
Menu Maintenance Enterprise DM	Total (6 rows)													
Project System Options Project Maintenance Project Maintenance User-Defined Logs User-Defined Logs User-Defined Logs User-Defined Tags User-Defined Filtins User-Defined Filtins User-Defined Filtins User-Defined Filtins User-Defined Filtins User-Defined Filtins User-Defined Maintenance User Definut Gal Storage Examples														

Sample of Auto Cold Storage Definitions Log screen, containing entries for each newly created trigger.

At this point the trigger is set and when a RFI is answered, the report will be generated automatically and it will appear on the **Attachment** tab, as follows:

хP	Request for Information	n		LiveCycle RFI Send I/O	Email Add Copy Edit Delete Submit Add Note Print I	Report Link to Issue Back To Log 🏼 🖓 🗈 🏫
\$⊡€	Project Management Menu	RFI Detail	Attachments	Related Objects		History
Search	Go			Not Submitted		
Pro	ject: Testing (MES007) Communication Management Project Calendar My Actom My Actom My Actom My Actom My Actom My Actom Project Patrice Directory Project Patrice Directory Project Context Directory Project Context Directory Distribution Lests Meeting Minutes Transmittals Transmittals Transmittals Occumunications	RTI No. VBP-13 From Orvistopher H Co-Atlon To Adam Halkov OC Subject Request for m Date Cented (9/5ep/2015 Source Question	olmes : atonal MSDS		Solute Pendi Schmitted Co-Author RFI No. Received Change_F Date Required 09/5e	9
	Request for material MSDS social Subcontract Management Subcontractor Prequalification Bib Management Bib Management Bis Management Bie Management Bie Management Bie Defined Logs File Maintennce Servith	Codi Tripact Federatily Schedule Tripact Petentally Answered By Vadem Bogon Date Answered 00/Seg/2015 Answere The request Codi Tripact Petentally Schedule Tripact Petentally Activity	olov ed MSDS has been sent by email.	1	Cast Amount Days Cost Amount Days	
	Partners Contacts					

The report, as an RFI document, is added to the Attachments tab in the specified folder:

Request for Informatio	n/////////////////////////////////////							Submit Upload Multi	ple Add/Upload New Add Attachment ES	lign Documents B	ack To Log 🛛 🗍	2 🖬 🍙
🛊 🗉 🐑 Project Management Menu	RFI Detail		Attachmer	its 🖌		Rel	ated Obje	ects	l l	History		^
Search						Not Submitted						
Project: Testing (MES007)	Туре	Number	Name	Rev. Number	Rev. Date	Description	Notes	User Status	Attachment	ESignings	ESign Status	Action
Communication Management	Schematics and Blueprints	PM3010-16:8313281	RFI Report	1 History	09/Sep/2015	Request for MSDS		SUBMITTED	PM3010_2015_09_0901_32_23.pdf			<u>\</u>
My Actions												

The RFI document is also added to the specified document type log:

XP	Project Management				Add Document Im	port Upload Mu	ltiple Go to F	Manwell Show Filter	Send To Spreads	heet Enter	Query		•
\$∃€	Project Management Menu			Docur	ment: Schematics and Blueprints								-
Search	ര	•	Number	Title	Rev Date •	Revision	Status	Related Object	Sheet No.	Issue	Size	Doctype	
	_	I D PM	3010-16:8313281	RFI Report	09/Sep/2015	1			1 PM3010				2
E Proje	ect: Testing (MES007)	4 🗌 ME	S007-0715-0002	startrailsindonesia_huichieh_960	07/Jul/2015	0				_			
	ocument Management	4 🗌 ME	S007-1114-0009	email with attachment	D4/Nov/2014	0			1				
	Submittals	4 🗌 ME	S007-1114-0010	email with attachment	04/Nov/2014	0			1				
-	Collaborator Submittals	4 🗆 ME	S007-1114-0008	Sample3	04/Nov/2014	0			1				
	Responsibility Log	4 🗌 ME	S007-1114-0005	image003	04/Nov/2014	0			1				
	Procurement Log	4 🗆 ME	S007-1114-0007	RE ECM Outlook Plug-in Release with source code 02-Nov-2014	04/Nov/2014	0			1				
	Submittal Packages	4 🗆 ME	S007-1114-0006	RE ECM Outlook Plug-in Release with source code 02-Nov-2014	04/Nov/2014	0			1				
PC	Documents	I □ ME	S007-1114-0004	image002	04/Nov/2014	0			1				
	- Audio/video		S007-1114-0003	image001	04/Nov/2014	0			1				
	Drawings		S007-1114-0002	email with attachment	D4/Nov/2014	0			1				
	- Photos		S007-1114-0001	Sample3	D4/Nov/2014	0			1				
-	DM3010 16-8313281		S007-1014-0034	Test results after Error 902 was fixed.	29/Oct/2014	1							
	- Test_3		S007-1014-0041	Sample1	21/Oct/2014	0			1				
B	Document Packages												

Log Builder for Auto Cold Storage

						ando		copy care out					
Log Builder										Save As Default	Reset Save	12 0	a 🗅
💠 🗈 🐑 Project Management Menu					Au	to Cold Stor	rage Defin	itions					
Search Go	\$	Vis	Column	* Header	A	lignment	Wrap	Link		Link Description	Sort	Order	Srch
Delet Teles (MEGOR)	¢	\checkmark	SACSD_TRIGGER_TABLE	Trigger table	left	~	\checkmark		¥				
Communication Management	¢	✓	SACSD_TRIGGER_COLUMN	Trigger Column	left	\sim	✓		v				
Document Management	0	V	SACSD_FROM_VALUE	From	left	~	✓		×				
Subcontractor Prequalification	\$		SACSD_TO_VALUE	То	left	~	✓		v				
Bid Management Budget & Cost Management	¢		SACSD_DOCTYPE_DESC	Document Type	left	~	✓		¥				
E 🔁 Site Management	¢	✓	SACSD_DOCNAME	Document Name	left	~	✓		v				
Reports	0	•	SACSD_REPORT_ID	Report ID	left	~	✓		~				
File Maintenance	0		SACSD_REPORT_TITLE	Report Title	left	~	✓		~				
Local Tables	¢		SACSD_DESCRIPTION	Description	left	~	✓	sysclog.log_type_name.SYSACSD	v				
	\$		SACSD_OBJ_ORASEQ_COLUMN	Object Column	left	~							
Project System Options	0		SACSD_PROJ_ORASEQ_COLUMN	Project Column	left	~							
- Company Control	•		SACSD_COMP_CODE_COLUMN	Company Code	left	~							
Project Maintenance			SACSD REP TYPE	Report Type	left	~							
User-Defined Log Types			SACSD REP CODE	Report Code	left								
User-Defined Logs			SACSD REPORT NAME	Report Name	left	~							
Log Builder			SACSD REPORT	Report	left								
Default Filters	à		SACSD_SERVER	Report Server	left								
User-Defined Fields	à		SACSD_OB1_TYPE	Object Type	left								H
User-Defined Classifiers	1Å		SACSD WORD TEMPLATE	Word Template	left								H

Sample of Auto Cold Storage Definitions screen, used to customize the Auto Cold Storage Log screen.

The Auto Cold Storage Definitions screen is used to turn fields in the Auto Cold Storage Log into hyperlinks, and to customize the headers, order, and visibility of the its columns.

NOTE: Access to the Auto Cold Storage Definitions screen is determined by the user's security settings.

Create Link in ACS Log to Launch ACS Definitions Screen

To create a link to access the ACS (Auto Cold Storage) definitions screen from the ACS Log, select **sysclog_type_name.SYSACSD** from the LOV of the **Link** column for the relevant field, as shown in the below screenshot, and click [**Save As Default**].

Image: Service Contract Project Management Menu Image: Service Contract Project Management Management Image: Service Contract Project Management Image: Service Contract Pro		g Builder								Save As Default Reset Save	E 🖬
Count Column * Hooder Alignment Weig Luk Link Link <thlink< th=""> <thlink< th=""> Link Link</thlink<></thlink<>	¢⊡⊞ Pro	oject Management Menu					Au	to Cold S	Storage D	Definitions	
Project General project for testing purpose	Search	Go	¢	Vis	Column	* Header	A	ignment	Wrap	Link Link Description Sort Ord	der Srch
Convertision Management Convertision Management			¢	✓	SACSD_TRIGGER_TABLE	Trigger table	left	~	✓		
Bournert Management Consider Management C	E Communica	ation Management	¢	✓	SACSD_TRIGGER_COLUMN	Trigger Column	left	\checkmark	✓		
B) Subcontrator Prequatification	Document I	Management	¢	✓	SACSD_FROM_VALUE	From	left	~	✓	V	
Bill Management	B 🔁 Subcontrac	tor Prequalification	¢	<	SACSD_TO_VALUE	То	left	~	✓	V	
Construction of the Management Construction	Bid Manage	ement Cost Management	\$		SACSD_DOCTYPE_DESC	Document Type	left	~			
Bit Reports	E Site Manag	jement	\$		SACSD_DOCNAME	Document Name	left	~			<u> </u>
Bit User-Defined Logs V Jacob decoded Titlic Report Code Report Titlic Report Code Report Titlic Report Code Rep	🗄 🦲 Reports				SACSD REPORT ID	Report ID	left				
Be Local Tables V V Second Seco	E User-Define	ed Logs			SACSO REPORT TITLE	Report Title	1-0	-		sysclog.log_type_name.SYSACSD	
Index Maintenance V Second Reprotor Report Name Report Na	E Ca Local Te	ables	*		SACSD DESCRIPTION	Description	left				
Interprise PM Project System Options Company Control Project System Options Success ACS Default]. In this particular case it is done access ACS definitions screen. User-Defined Logs Success Column Project Column If v	- 🔄 Menu M	faintenance	4		SACSD REP CODE	Report Code	left				
Project System Options Option O	- C Enterpri	se PM Sustan Options	*		SACSD REPORT NAME	Paport Name	laft				
Project Maintanace Project Maintanace Project Maintanace Activities Activit	- Compar	ny Control	Ψ *		SACED REPORT	Deport	laft			Select 'sysclog.log_type_name.SSYSACSD' from the LOV	吕님
Activities Image: Construction of the co	- C Project	Maintenance	Ψ		SACSD_REPORT	Report Depart Canada	Icit.	×	•	and click [Save As Default]. In this particular case it is done	
User-Defined Logs User-Defined Logs V SACSD, OBL_TMFE Verd Template Verd Template	- Activitie	5	Ψ	•	SACSU_SERVER	Report Server	len	~	V	for 'Report ID' - and the Report ID field will be the link to	
Big Log Builder Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data Image Data	User-De	efined Log Types efined Logs	\$	V	SACSD_OBJ_TYPE	Object Type	left	~		access ACS definitions screen.	
Auto Cold Storage Definitions Concerning Concerning Concerning Concerning Concerning Concerning Concerning Concerning Concerning Concerning Co	E 🗁 Log Bui	lder	¢	⊻	SACSD_WORD_TEMPLATE	Word Template	left	~	✓		
Default Filers	Auto	o Cold Storage Definitions	\$		SACSD_OBJ_ORASEQ_COLUMN	Object Column	left	~			
Cuse-Defined Classifiers	- Default	Filters	\$		SACSD_PROJ_ORASEQ_COLUMN	Project Column	left	~	✓		
Report Assignment	User-De	efined Classifiers	\$		SACSD_COMP_CODE_COLUMN	Company Code	left	~	✓	V	
Prompt Maintenance Defaults Maintenance	Report	Assignment	\$		SACSD_REP_TYPE	Report Type	left	~	✓		
B Dournett Mege	User De	Maintenance efaults Maintenance ent Merge									

As shown in the following screenshot, the field in the ACS Log becomes a hyperlink that launches the ACS Definitions screen:

ХP	Project Management									Show F	ilter Send To	Spreadsheet	Enter Query	₽ I	I A
\$ E E	Project Management Menu						Auto Cold Storage Definitions								
Search	Go	Trigger table	Trigger Column	From		Document Type	Document Name	Report ID	Report Title	Description	Report Code	Report Name	Report	Report Server	Object Type
E C Proje	ect: Testing (MES007)	PMCOMMUNICATION	PMCOM_RECORD_STATUS	PENDING	SUBMITTED	PM TEST	PM3020_2015_09_0910_34_57	PM3020-7	Comm Report	To test ACS		PM3020	PM3020	testv10x	
⊕ <mark></mark> 0 ⊕ <u></u> 0	ocument Management ubcontractor Prequalification	PMRFI	PMRFI_ANSWER			PM TEST	PM3010_2015_09_0815_09_13	PM3010- 15	RFI report for testing ACS	Testing ACS		PM3010	PM3010	testv10x	PMRFI
B D B	id Management urdget & Cost Management	PMRFI	PMRFI_ANSWER			PM SCHEMATICS	PM3010_2015_09_0911_04_48	PM3010- 16	RFI Report	Request for MSDS		PM3010	PM3010	testv10x	PMRFI
• 🖸 S	te Management					PM Attachment	PM3010_2015_09_2515_37_33	PM3010- 16	Document Merge	test		PM3010	PM3010	testv10x	PMRFI
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	eports ser-Defined Logs					PM SCHEMATICS	SYSRPDOC_2015_06_1112_57_32	SCMAST- 7996474	Document Merge		PM2040A_ST	SYSRPDOC	SYSRPDOC	testv10x	C SCMAS
D Con Fi	le Maintenance Local Tables					PM SCHEMATICS	SYSRPDOC_2015_04_1016_22_13	SCMAST- 7859914	Document Merge	sb- 14.94616 - CS Auto	10040A_ST	SYSRPDOC	SYSRPDOC	testv10x	SCMAS
	Project System Options	Total (7 rows)				PM Attachment	SYSRPDOC_2015_06_1113_18_08	SCMAST- 7996474	Report to test ACS	A	CS definit	ions scree ia Report	en now car Id link	1 be	SCMAS
	Company Control Project Maintenance Activities User-Defined Log Types User-Defined Logs														

ECM Explorer

Installation

If the ECM Explorer has not been installed on your system, contact your System Administrator to obtain the required files and run the .EXE for the necessary plug-in, or have them installed by your IT department.

Set Up - Screen

Settings

The connection to the ECM service is configured on the Set Up screen:

🕵 Set Up Home Change Log	Į	CMIC ECM Explorer	_ 🗗 🗸
Settings	Server Con	figuration Settings	
Synchronization Mode	Enter Login Deta Tenant Id:	alls	
	Username:	da	
File Renaming	Password:	•••••	
	Service URL:	http:// <server>:<port>/cmic<environment>/MSPluginWebService/MSPlugin/MSPluginWS/</environment></port></server>	
Locking		ОК	
	Enter the Proxy	Details	
Bendelaure	Server IP:		
REVISIONS	Port		
	Username: Password:		
	Enable Prox;	Save	

Enter Single Sign On user ID, password and applicable URL for ECM service and click [OK].

When connection is established the expandable "CMiC ECM" node will be shown on the right pane of the main screen (Home):

Set Up Home Change Log	CMIC ECM Ex	plorer — 🗗 🗙
		Enter text to search
C> ECM_DRIVE> CMIC ECM		CMICECM
B: S: Construct of the second s	rating Spec Section	

Locking

🕵 Set Up Home Change Log	CMIC ECM Explorer	- 🗗 🗙
Settings	Lock Options	
Synchronization Mode	Select document lock option C 🔒 Lock all downloading files	
File Renaming	© ■ [®] Show message before downloading file	
Locking		
Revisions		
E		

Files which are being downloaded can be locked/unlocked based on this setting.

The Lock all downloading files option will lock them for the change.

The **Show message before downloading file** option will prompt the user if file should be locked or not:



Revisions

🕵 Set Up Home Change Log	CMiC ECM Explorer	— & X
Settings	Revisions	
Synchronization Mode	Revision upload option C Upload only latest revision	
File Renaming	Upload all revisions Enable server autorenaming Save	
Locking		
Revisions		
E		

There are two revision options for the documents to be uploaded:

- 1. To upload only the last revision of the document.
- 2. To upload all revisions.

If the **Enable server autorenaming** checkbox is checked, the app will apply the document autorenaming settings on the server, if there are any.

Home – Screen

Set Up Home Change Log	CMiC ECM Explorer	— 🗗 🗙
Refresh Explorer Billing Backup Images	e VBR	
Cm32 Could not settings Could not settings Ect_DRIVE CMCECM G OO-demojob Project - test		
Comparing the set of submittel mask incorporation of the subm	ng Spec Section B / WBS4	
Photos Schematics and Blueprints Test_3 Control Test_3 Control Test_3 Control Test_3 Control Test_3 Control Test_3	Communications (1) File (0) Submittals (11) Communications (1) RFIs (0) Submittals (14)	

There are two buttons on the Home screen:

[Refresh] - Button

Updates the ECM treeview content in the panes.

[Hide Explorer] – Button

Removes the local drive pane.

Panes

SetUp Home Changelog Child ECM Beplorer							- B 🕽
					Test	ing	٩
C > ECM_DRIVE > CMIC ECM > Test project > Drawings			CMiC ECM > Projects > ZZ Walmart > Documents (13	!) > Attachments (9)			
Dell Documents and Settings ECM_DRIVE Christer Concents and Settings ECM_DRIVE Christer Concents C			West West War-Mart Naples FL Store# 6506 - 0 Work Order Billing W6100 War-Mart Naples FL Store# 6506 - 0 Work Order Billing W6100 War-Mart Naples FL Store# 6506 - 0 Work Order Billing W6100 Waster Store	nange name in OM 16 0)			J
Title Name Created On I	Created By Size		Title	Name	Created On	Created	Size
ZZ_V10_t2st_t3st ZZ_V10_t2st_t3st.pdf 19/11/200910:31:08 v	adim.bogom 136.8	85 KB	Attachment	xProjectsLogo.png	03/04/2014 2:28:41 AM	DA	755.00 Bytes
			BlockScrollBar	BlockScrollBar,java	17/03/2015 12:14:58 PM	DA	05.18 KB
			IncreaseFieldsTo200	IncreaseFieldsTo2	17/03/2015 12:16:28 PM	DA	521.39 KB
			Test	Testing.pdf	17/09/2014 9:06:37 AM	DA	81.05 KB
			Test	Testing.bax	19/09/2014 11:36:06 AM	DA	07.84 KB
			connections	connections.xml	17/03/2015 12:15:11 PM	DA	03.33 KB
			search_set	search_set.txt	17/03/2015 12:16:28 PM	DA	846.00 Bytes
			55	1495496.PDF	30/03/2015 12:56:08 PM	DA	17.45 KB
			testing it	1495496.PDF	27/08/2014 4:55:37 AM	DA	00.00 Bytes

The main window is split into 2 panes. The left pane shows the treeview of the local drive. The ECM treeview from the server is displayed on the right pane. The bottom sections show the details of the selected items.

Document Synchronization

To perform the document synchronization operation for the particular project, 2 steps are required:

Step 1: Create folder for the project – drag and drop the project node to the ECM folder on the local drive:



This operation creates the document folders structure (without documents) for the project as it exists on the server:



Step 2: Right click on the project node to display the context menu:

Set Up Home Change Log	CMIC ECM Ex	plorer	- 6	P X
			Enter text to search	٩
LOCAL :: C > ECM_DRIVE > CMIC ECM > ZZ Walmart		CMiC ECM > Projects > ZZ Walmart		
C C B Secycle Bin bea bea B Billing Backup Images C Cm32 B Dell D Dell C Suproject for MESOD5 B Suproject for MESOD5 B Suproject for MESOD5 B Attachments (0) B Attachments (0) B Dravings (0) > Protocs (0) > Schematics and Blueprints (0) > Facture FECM B Found 000 F Found 000 F Found 000 F Foradg B Oracle		Image: Signal Stress WBS1 Image: WBS1 WBS10 Image: WBS2 WBS2 Main WBS Mapping Image: WBS4 WBS3 Image: WBS4 WBS5 Image: WB54 WB54 Image: W		

Choose the 'Sync' option, and select your file locking choice for the downloaded documents, then documents from the project will be copied to the local drive:



The bar on top of the ECM Explorer window will show the progress of the synchronization:



File Operations

Selected files can be copied from the local drive to the server and vice versa. Simply drag-and-drop them from one pane to another. Depending on the destination node, the files will be added to the PM item as attachments or to the Document folder.

Context Menu on Local Side

There are two types of local context menus:

1. For Projects

Set Up Home Change Log CMiC ECM	Explorer	— b	X
		Enter text to search	٩
LOCAL :: C > ECM_DRIVE > CMIC ECM > ZZ Walmart			
C C C C C C C C C C C C C C C C C C C	B VR Test 01 B VR Test Noject 1 B VR Test Noject 1 B VR S1 B VR S2 B VR S2 B VR S2 C VR S3 B VR S4 B Submitts (11) B Sold0 B Sold0 </td <td></td> <td></td>		

Available options are:

Refresh: refreshes the display of the content for current project to show latest changes.

Show in CMiC: finds and displays the current project on the right side of the window.

Synch: performs the document synchronization for current project.

Release Locks: unlocks the documents.

Delete: deletes the current project folders tree from the local drive.

Show In Explorer: shows the current folder in Windows Explorer.

2. For Document Folders

Set Up Home Change Log		CMIC ECM E	xplorer	— t	$h \times$
				Enter text to search	٩
LOCAL :: C > ECM_DRIVE > CMIC ECM > ZZ Walmart	> Drawings (5)		CMICECM		
C C SRecycle Bin C C SRecycle Bin C C SRecycle Bin C C C C C C C C C C C C C C C C C C C	æ		Construction Projects Image: Construction of the second of the sec		
Title Name PM3020_2014_09_23_09_43_12_pdf PM3020_20	Created On 22/09/2014 8:44:50 AM	Created By Size			
ZZ (1).pdf ZZ (1).pdf	15/04/2015 9:18:12 PM	Vadim.Bogomo 136.85 KB			

The available options will be applied to the selected documents/folder, and they work the same way as the ones of the project menu.

Change Log – Popup



The Change Log popup displays information about changes in the documents content. It can be filtered by using the [**All**] or [**Conflicts**] buttons along the bottom, or by entering search text into the search field.
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