User Reference (v10x)

ECM & Mobile Approvals

By CMiC

CMiC
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Proprietary Notice

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User Reference Guide – Version: **CMiC Open Enterprise v10x** Printed: **September 24, 2019**

Contents

Enterprise Content Management & Mobile Approvals

Feature Set 06 – ECM Enhancements

Please note that this documentation is related to Enterprise Content Management with the enhancements provided as part of Feature Set 06 in the V10_X product line.

Overview – Enterprise Content Management

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]

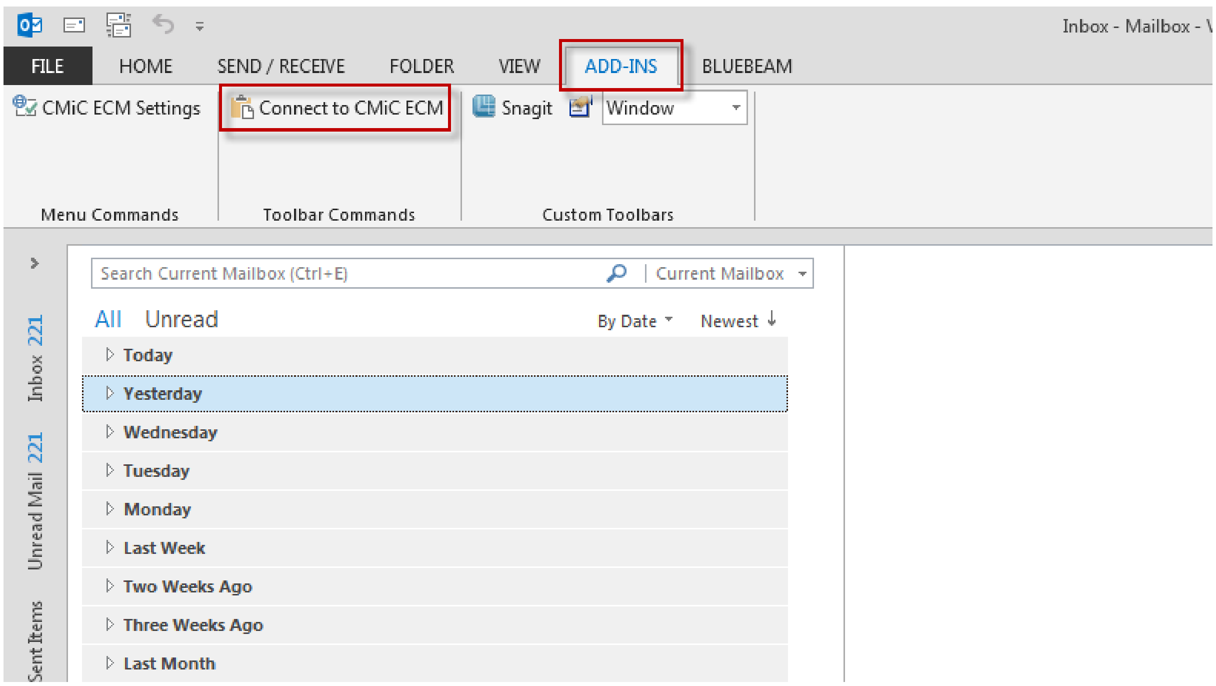
Examples:

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

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

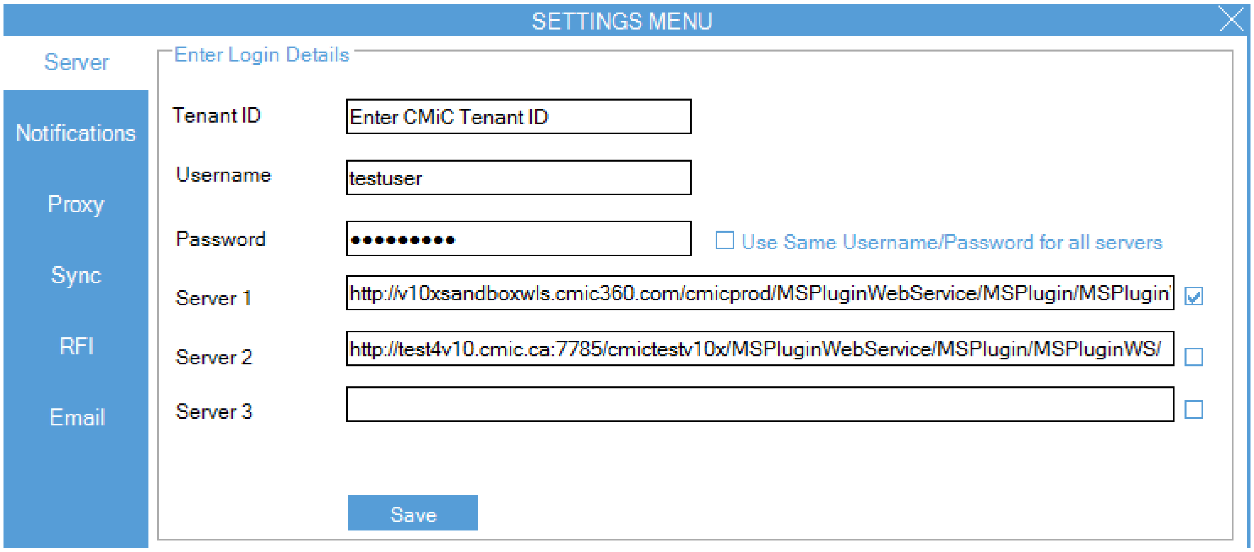
CMiC ECM in MS Outlook

ECM in Outlook



The CMiC ECM Plug-In is located on the **ADD-INS** tab of the Outlook.

Clicking on the **CMiC ECM Settings** gives the following popup:



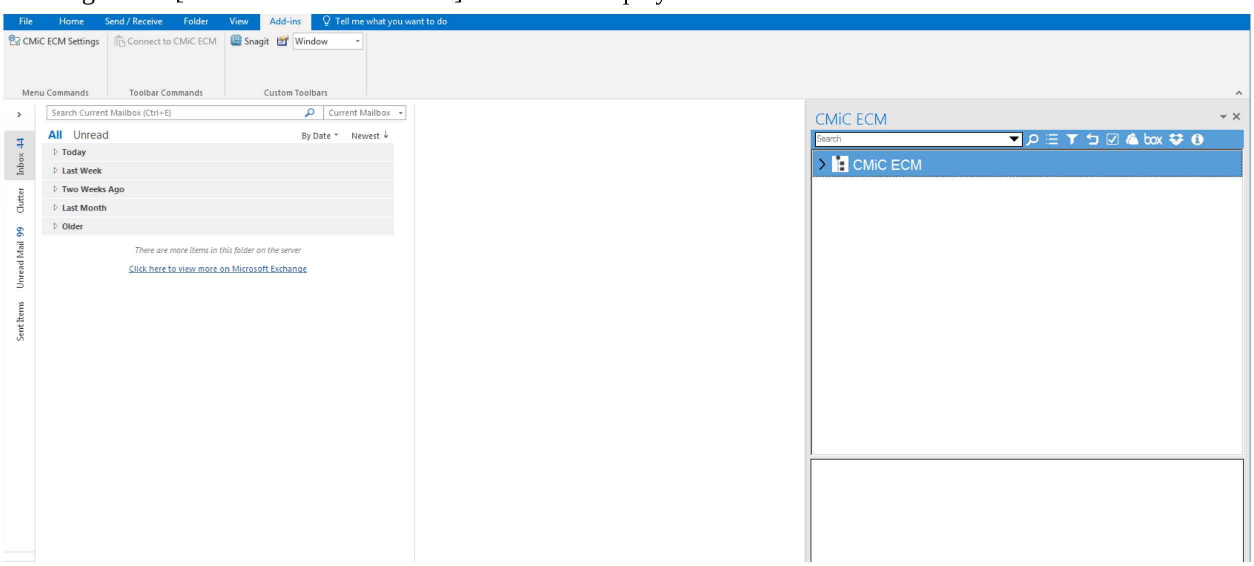
Enter the Single Sign-On (SSO) user-ID, password and URL for the CMiC environment that is applicable.

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

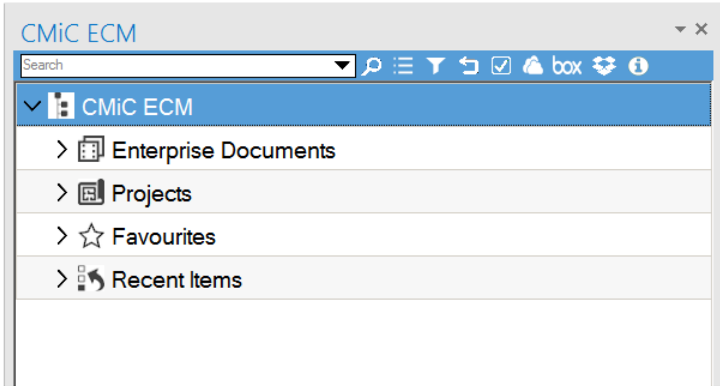
These settings will be retained every time the user signs into MS Outlook, until they are changed for another user.

NOTE: Please check the *Settings Menu* section for other menu items description.

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



Click the **CMiC ECM** root node to expand the tree, revealing its 4 sub-nodes:



CMiC ECM Node	Description
Enterprise Documents	Provides access to ECM documents in Image Manager.
Projects	Displays Treeview with PM menu items.
Favourites	Provides quick access to selected projects.
Recent Items	Stores 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

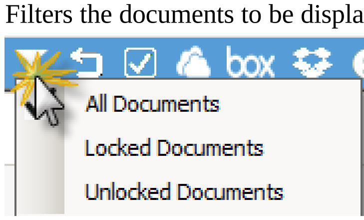
1. Control Panel

A. 

Performs the text search across the ECM content.

B. 

Filters the documents to be displayed. Available options are:



C. 

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

D.  / 

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

E. 

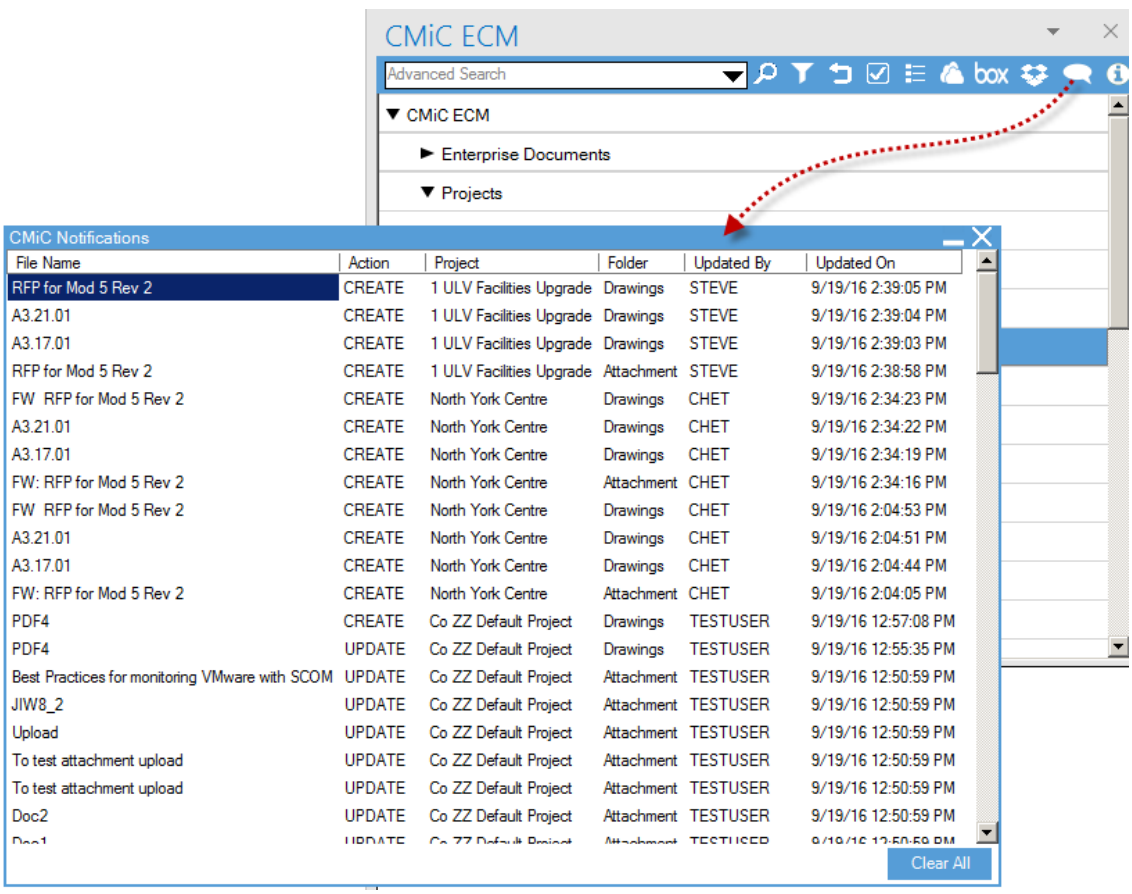
Turns on the pane where user can edit the document metadata. If plugin is connected to cloud storage, this pane is used to display the cloud content.

F. 

These buttons are used to connect to the cloud storage or (if connected already) to display the content stored on the cloud. Currently OneDrive, Box and DropBox are supported. For more details please refer to *Using Cloud Storage* section.

G.  / 

The documents update indicator for the accessible projects. It becomes green when there are new notifications. When clicked it opens the window with the list of the document updates:



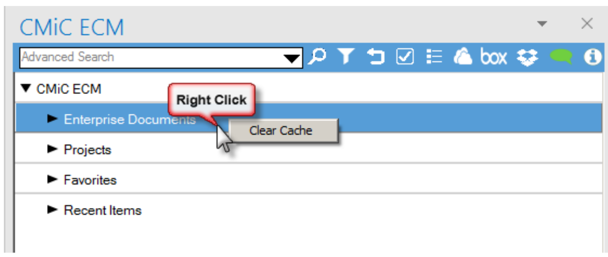
H. 

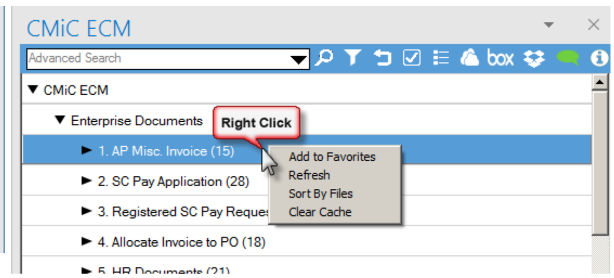
Displays the versions of installed ECM plugin and Web service:

2. **Context Menus** (Right-Click 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

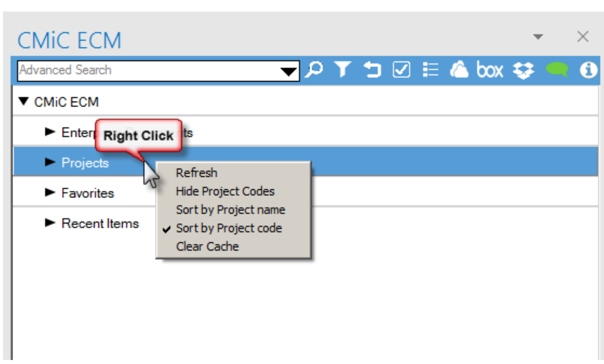




Context Menu Options (Right-Click):

1. **Add to Favorites -** Adds selected project to **Favourites** node for quick access.
2. **Refresh**: update the document list of this type from the server. This option is available for the document folders only.
1. **Clear Cache**: clear the local computer's cache.

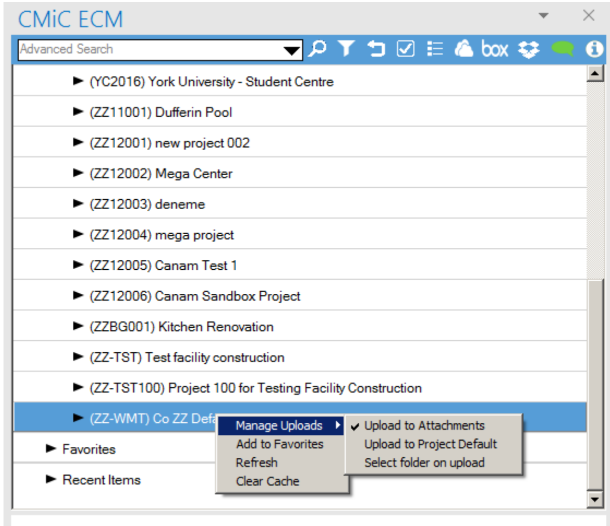
Projects – ECM Node



Context Menu Options (Right-Click):

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 Projects.
4. **Clear Cache**: clears the cache on the local computer.

Project Records



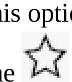
Context Menu Options (Right-Click):

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';

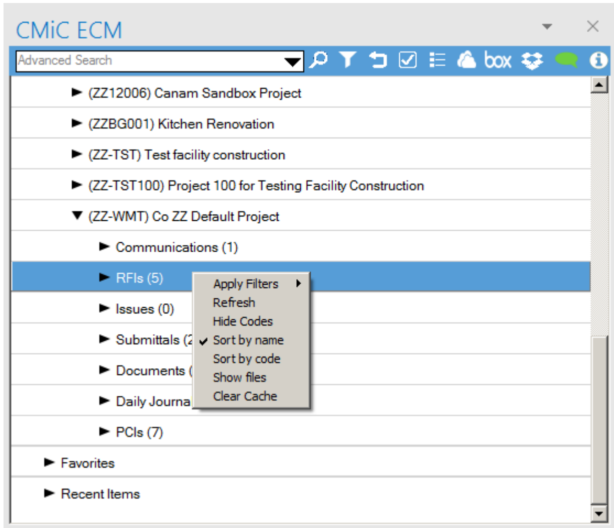
3. **Refresh**

   Updates the displayed items.

4. **Clear Cache**

   Clears the cache on the local computer.

Project Items



Context Menu Options (Right-Click):

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**

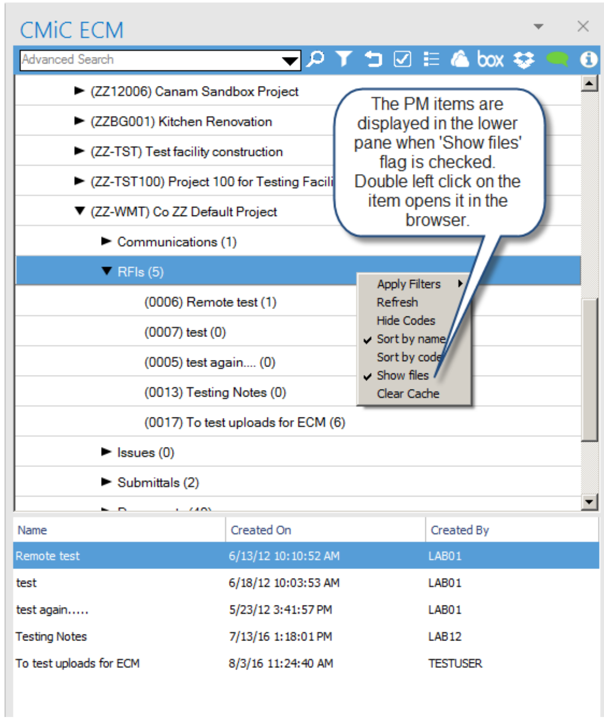
   Hide or display the PM item IDs.

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

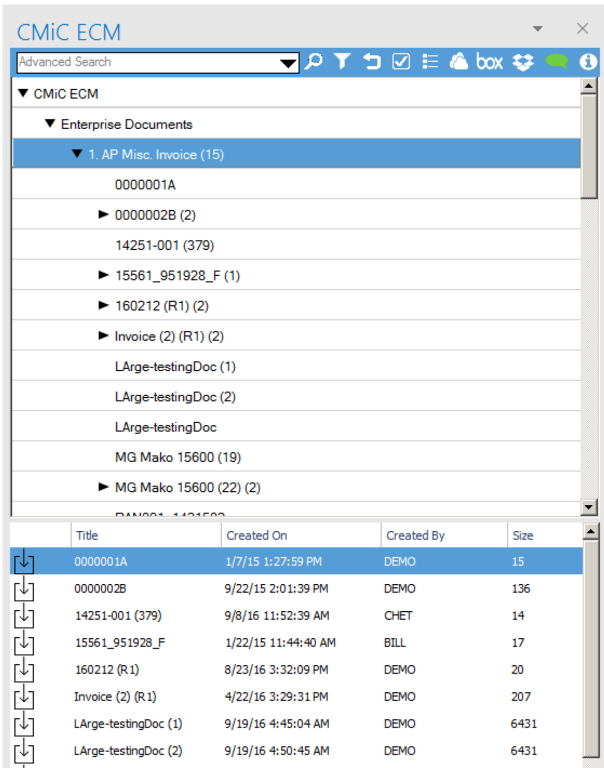
NOTE: The context menu for PCI and Daily Journal does not have **Apply Filters** and **Show Files** options. The **Documents** context menu has the same options as that of **Enterprise Documents**: **Clear Cache** and **Refresh**.

3. **Detail Pane**

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

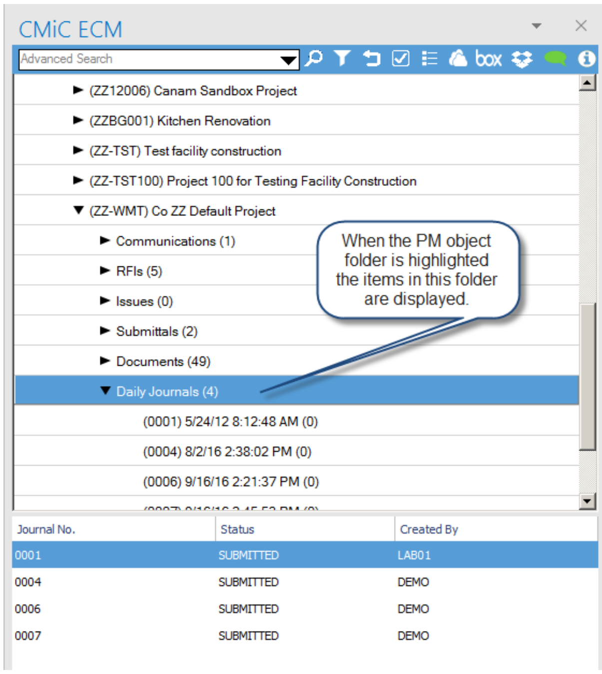
Enterprise Documents

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

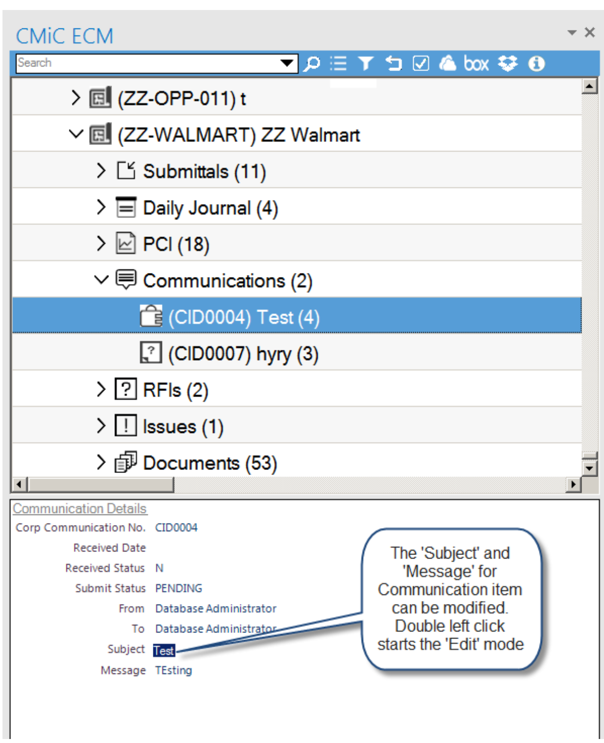


Projects

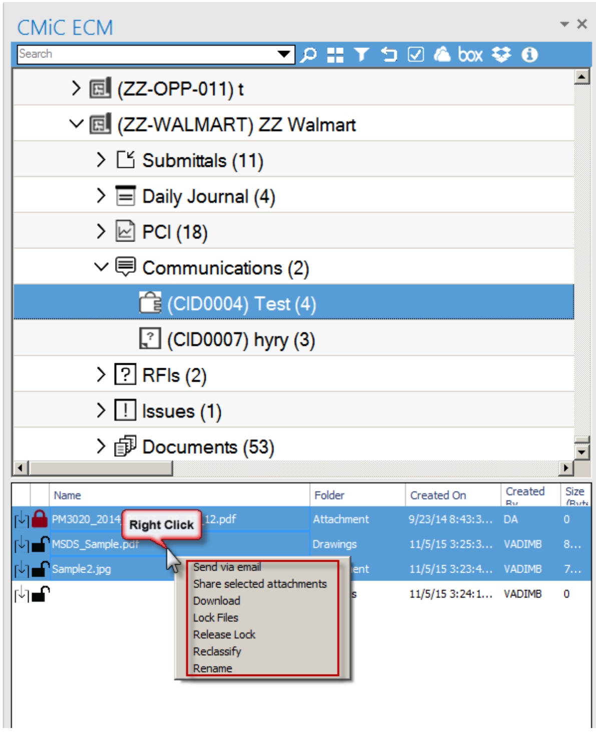
When the PM items folder is highlighted the items in this folder are displayed:



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



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

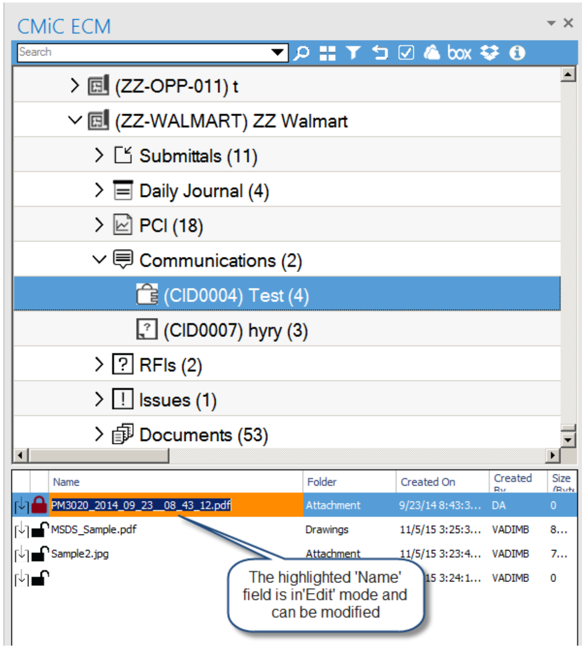


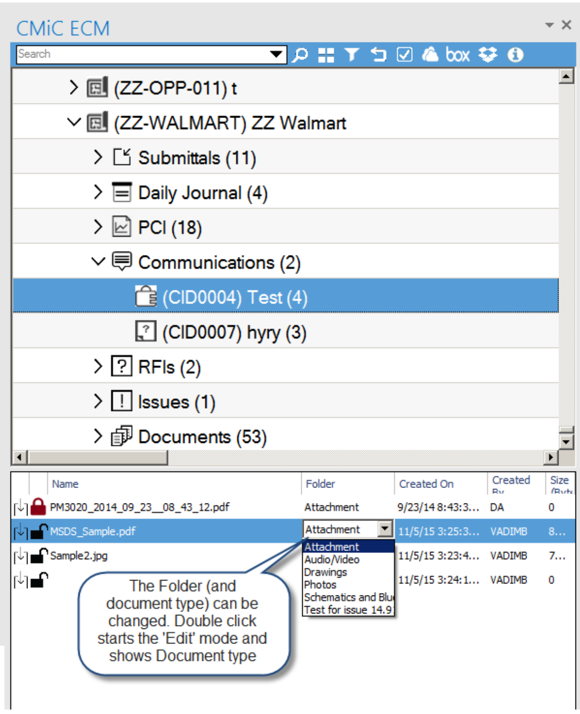
For multiple selection:

- 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).
- Selected documents can be sent by email; if **Compress all the attachment into ZIP file** flag on the **Email** tab is checked, the documents will be archived and attached to the email.
- Selected documents can be shared; when this option is chosen, the new email screen opens with links to the selected documents.

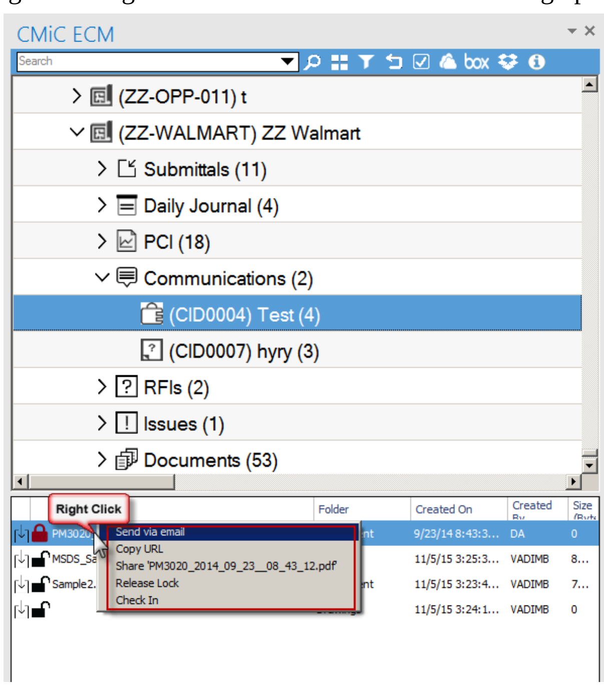
For single attachments:

- 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:





- Right clicking starts the context menu with following options:



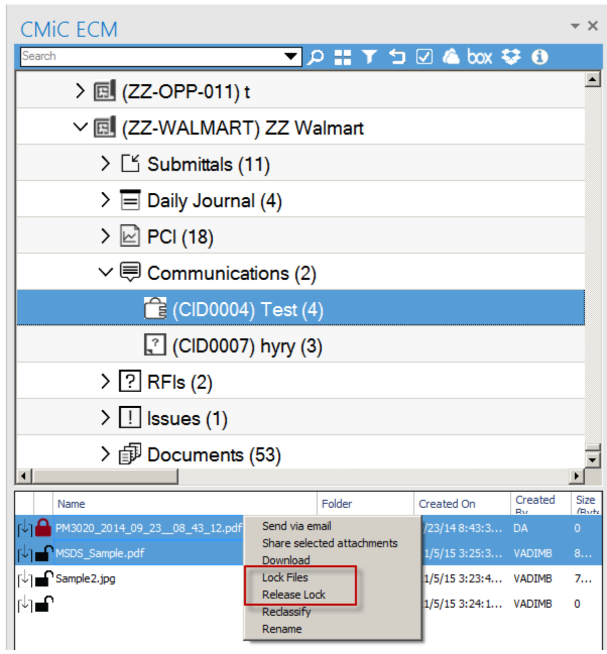
  - **Send via email**: creates email with the selected document attached (or archived if corresponding flag is set in the 'Settings'/'Email');
  - **Copy UR**: Copy URL for selected file to the buffer for later use.

- **Share <*file name*>***:* Creates the email with link for the attachment to be shared.
- **Lock File / Release Lock**: Locks/unlocks the selected file.

  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 Files: applied to unlocked documents only.

  Release Lock: applied to locked documents only.



- **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.

Dragging & Dropping Emails & Attachments

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

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

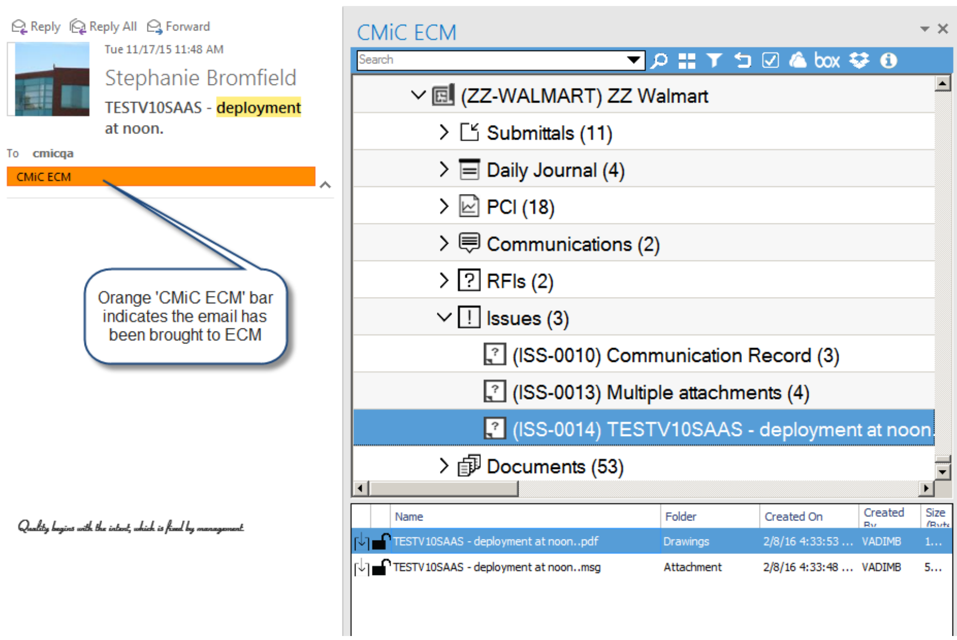
When an email is dragged and dropped to the Image Document Type node in Enterprise Documents, the new document is created in Image Manager.

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.



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.

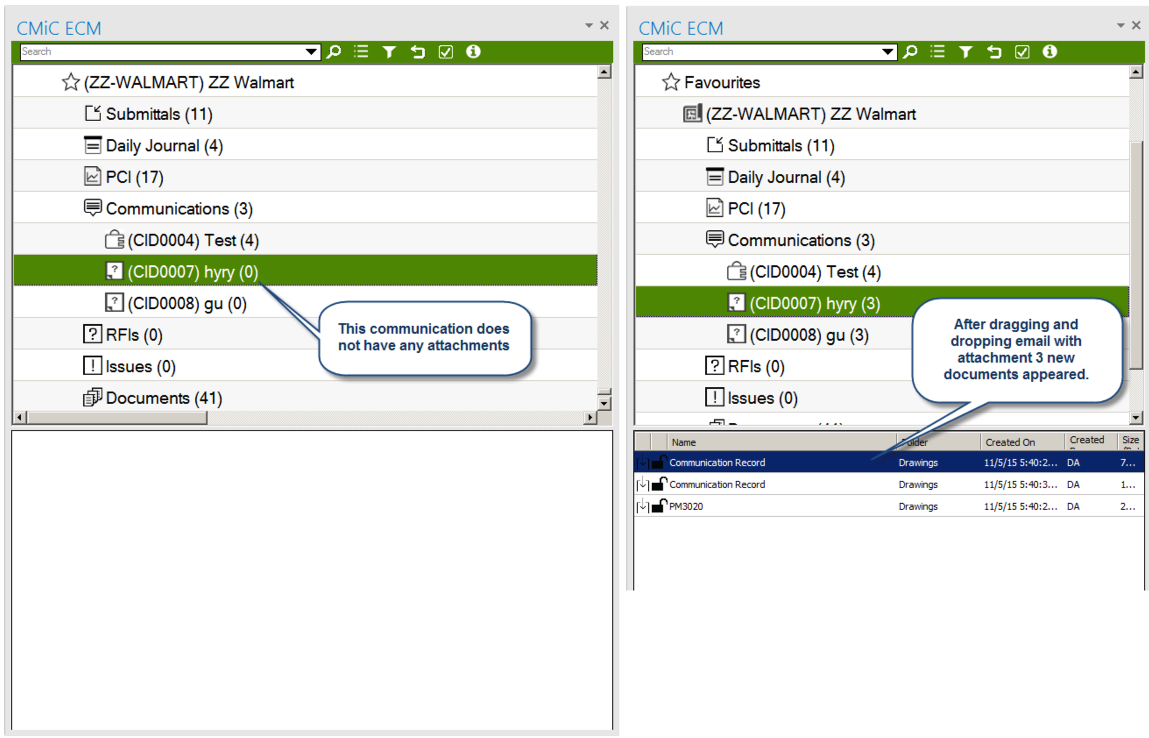
Project Management Integration

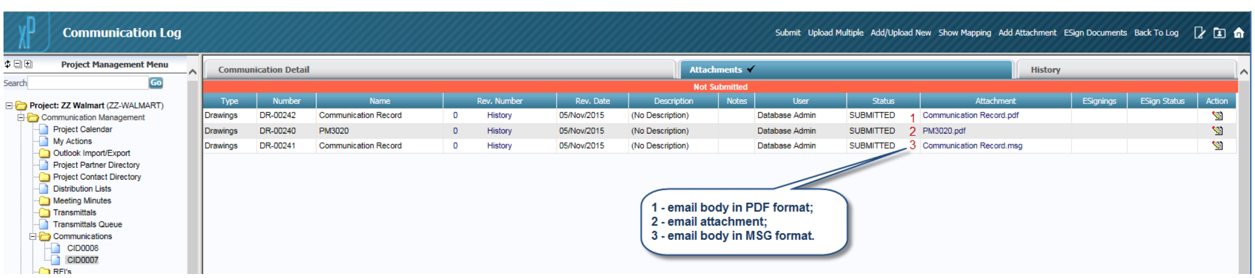
Communications, Submittals, RFIs, Issues, Documents, Daily Journals, PCIs, Subcontracts and Subcontract Change Orders are currently the only PM objects (records) that are integrated into ECM.

Un-submitted RFI, Issue and Communication records can be created through the drag + drop actions. Any attachments on the email will become attachments on the created records.

Communications

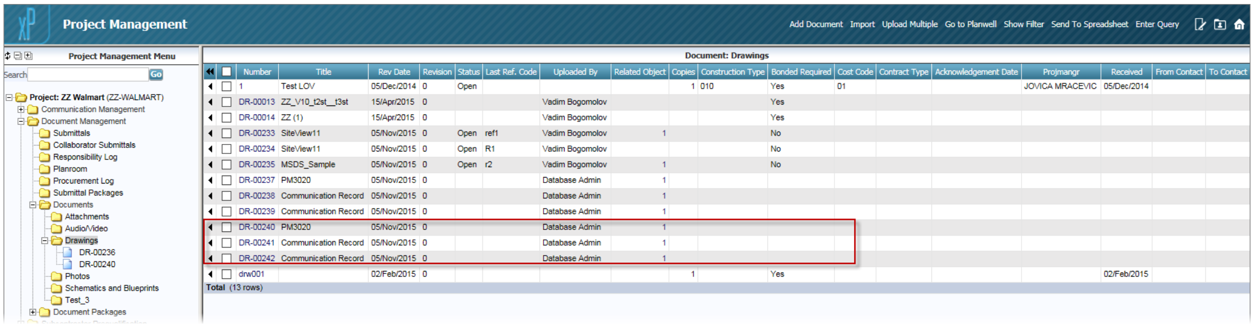
Dragging and dropping an email or file on the Communications folder in CMiC ECM will cause an un-submitted communication record to be created with attachments of the document type based on settings in Manage Uploads.





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.

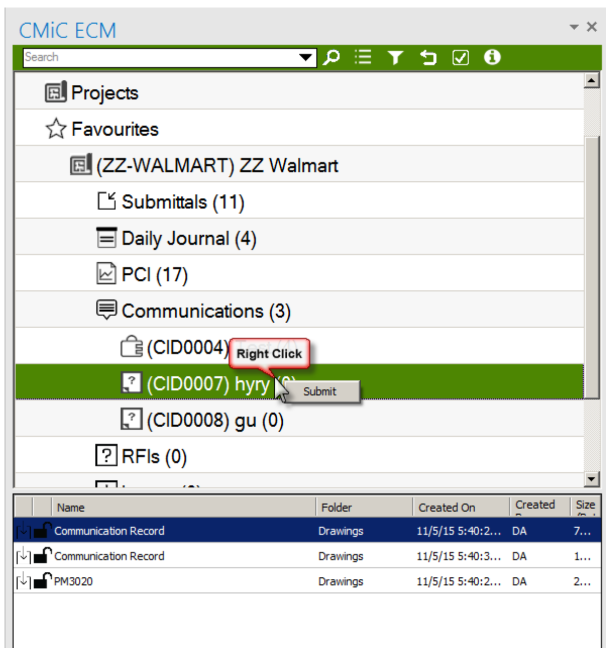
Document records are also created in the Document Management – Attachments folder of the same project:



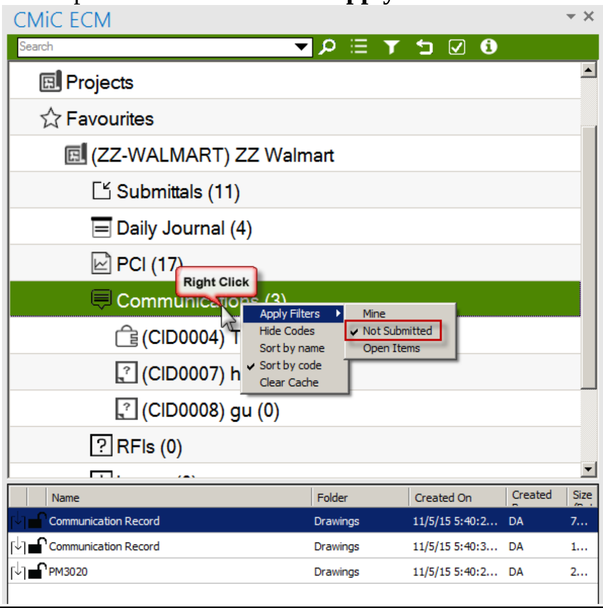
Double-clicking the attachment in the bottom pane will open the attachment in the program it was created in (Excel, Word, and Adobe etc.)

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).

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



NOTE: This option is available when **Apply Filters** > **Not Submitted** is used:



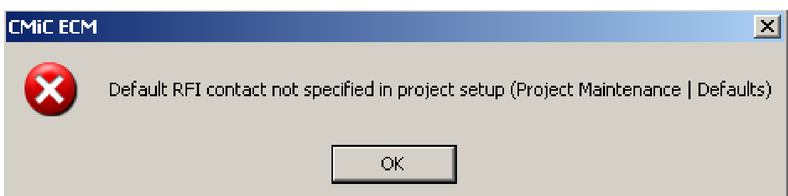
Issues

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:



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

Submittal records are not created from drag and drop actions, and must be created in the PM module. After the Submittal record is created in PM, it appears in ECM's **Submittals** folder so that emails can be dragged and dropped onto the Submittal record. Dragging and dropping an email onto a Submittal record adds the email and its attachments to the Submittal as attachments.

The only field available for modification is **Name**.

PCIs, Daily Journals, SC & SCO

PCI, Daily Journal, Subcontract (SC) and Subcontract Change Order (SCO) records, like Submittals, are not created from drag and drop actions, and must be created in PM to have them available in ECM for drag and drop actions.

After one of these records is created in PM, it appears in the appropriate folder in ECM, so that emails can be dragged and dropped onto the record. Dragging and dropping an email onto one of these record adds the email and its attachments to the record as attachments.

There are no fields available for modification for these items.

Documents

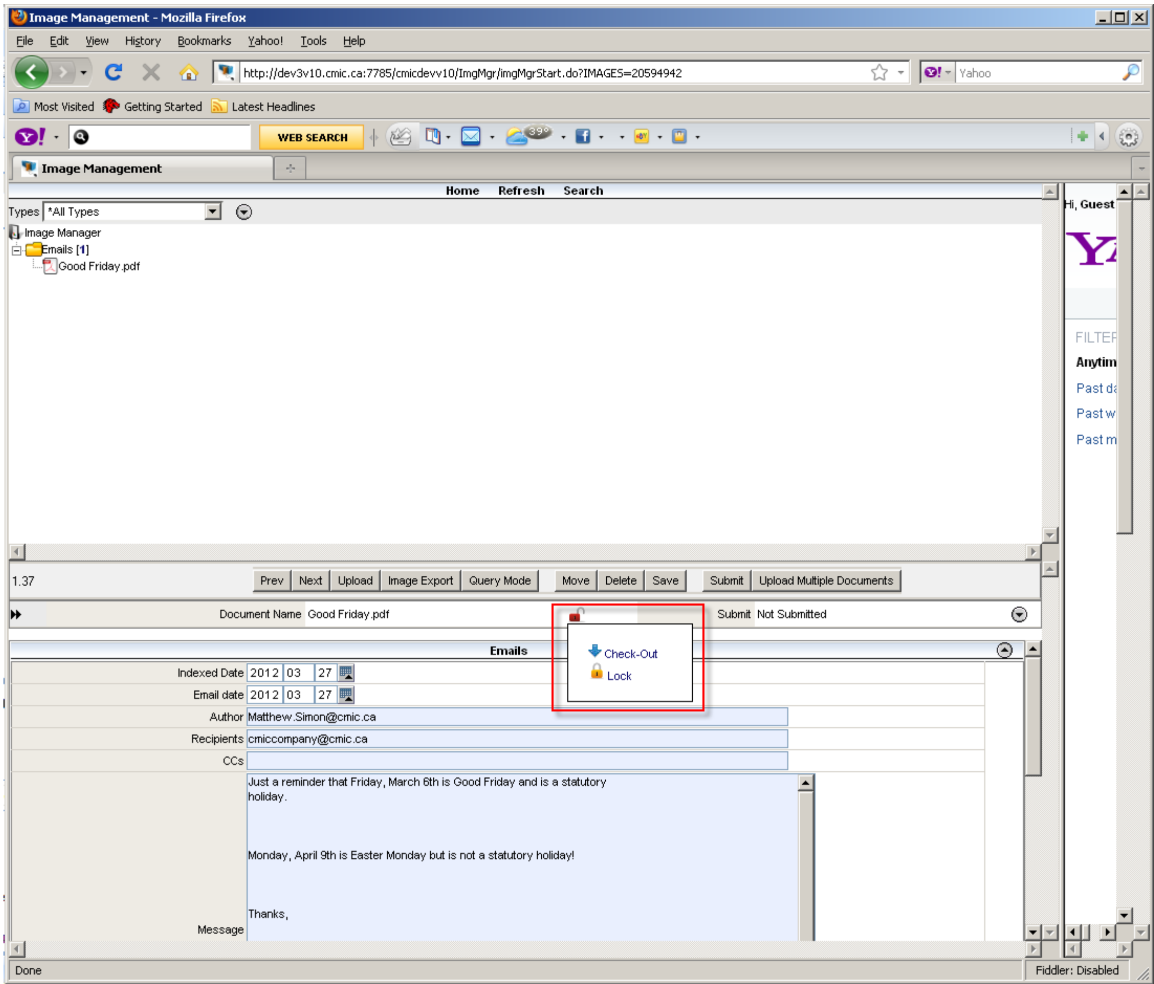
Email messages can be dragged and dropped onto Document records as well. When this happens, both an MSG file (representing the original email) and a PDF representation of the email are created as separate document records under the document type to which the email was dragged and dropped. Thereafter,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

Locking and Checking Out Files

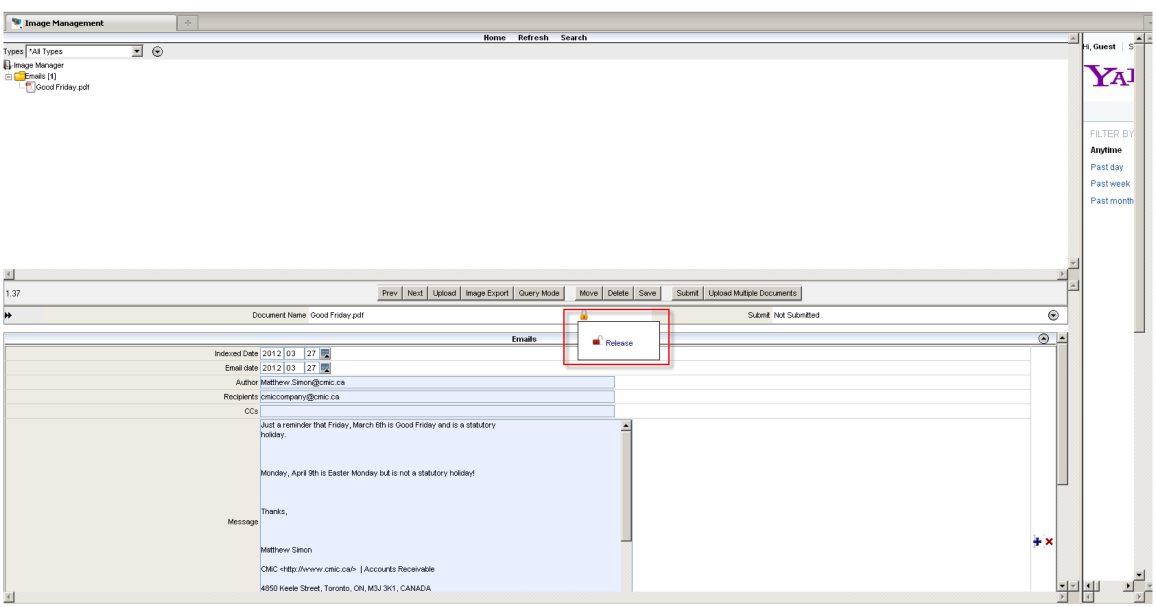
Locking

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.

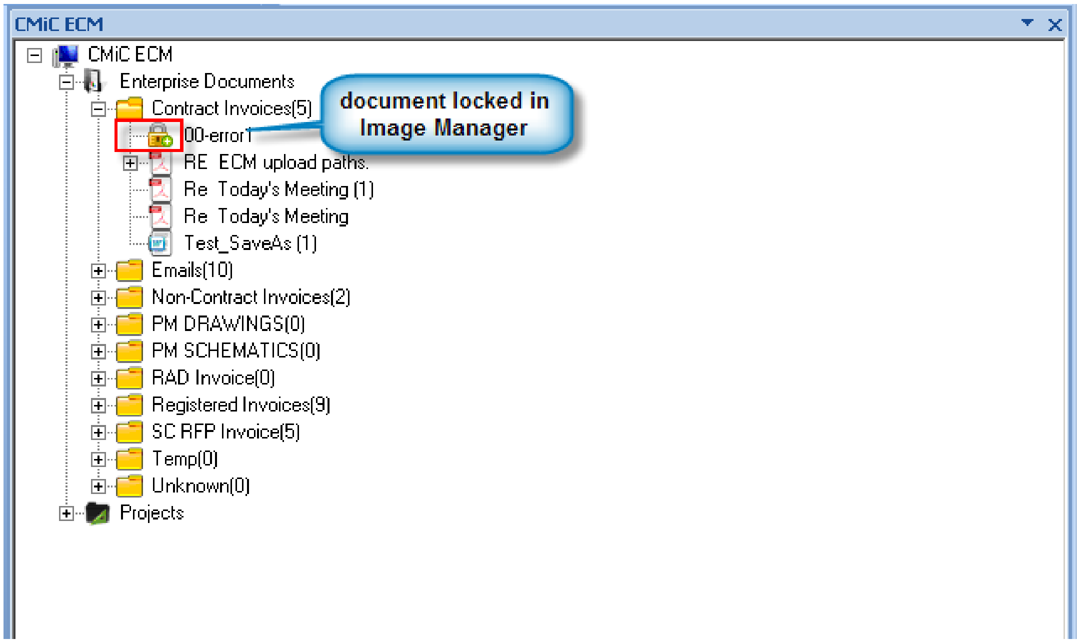
Locking is available when the ECM flags for IMG or PM are set to the 'On' state. That is when the user will see the Padlock icon  .



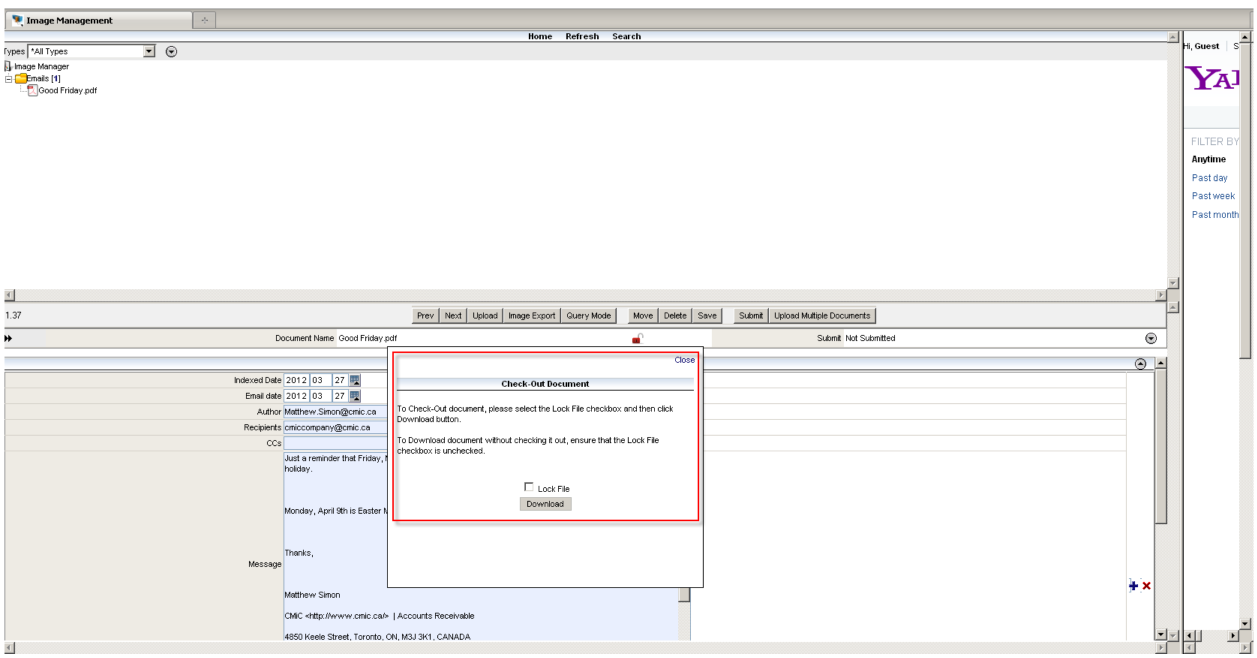
The red lock (highlighted in the screen print above) allows the user to lock or check-out a file.



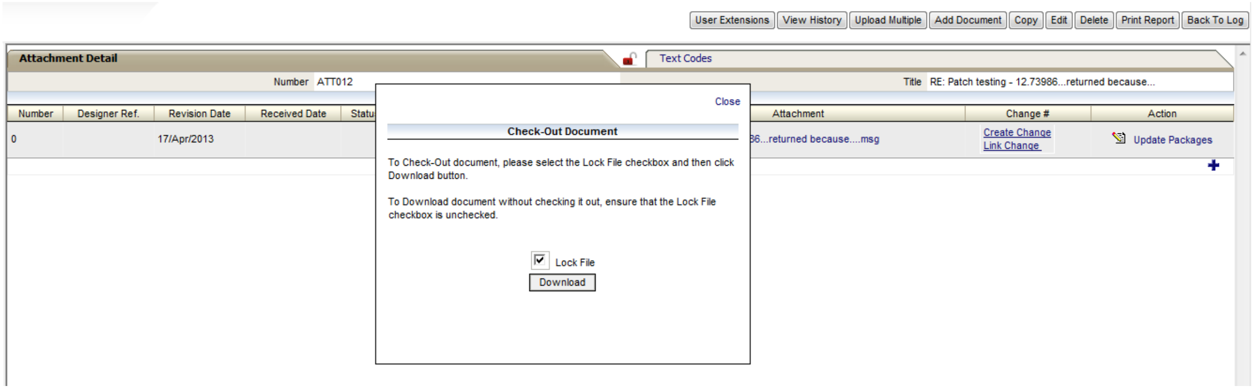
When the document is locked in Image Manager, the icon in ECM changes to a lock as well:



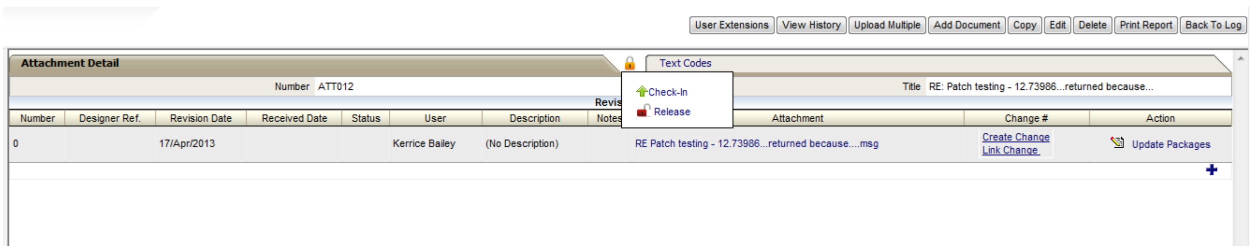
Checking Out



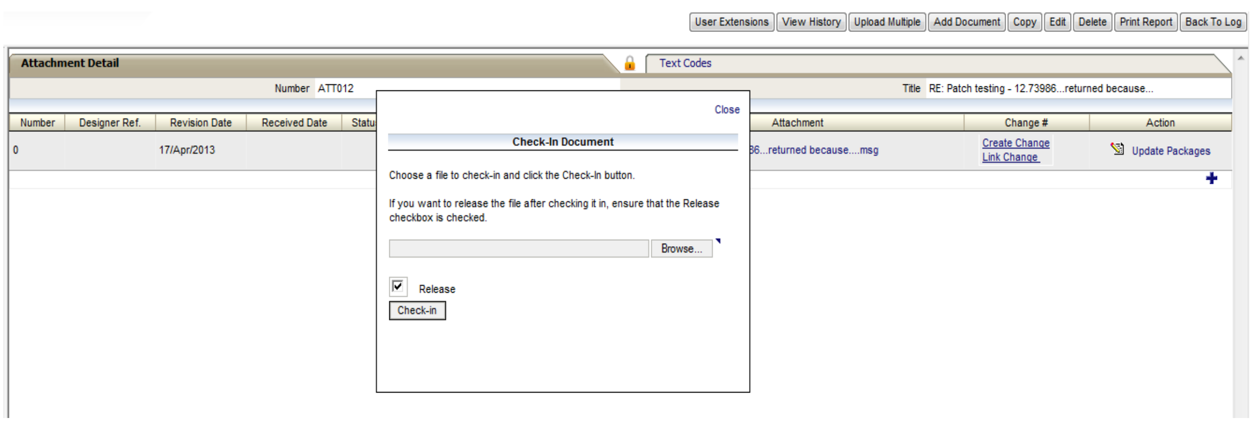
In Image Manager, the Check-Out feature allows the user to download an attachment. The same applies to Project Management Documents:



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



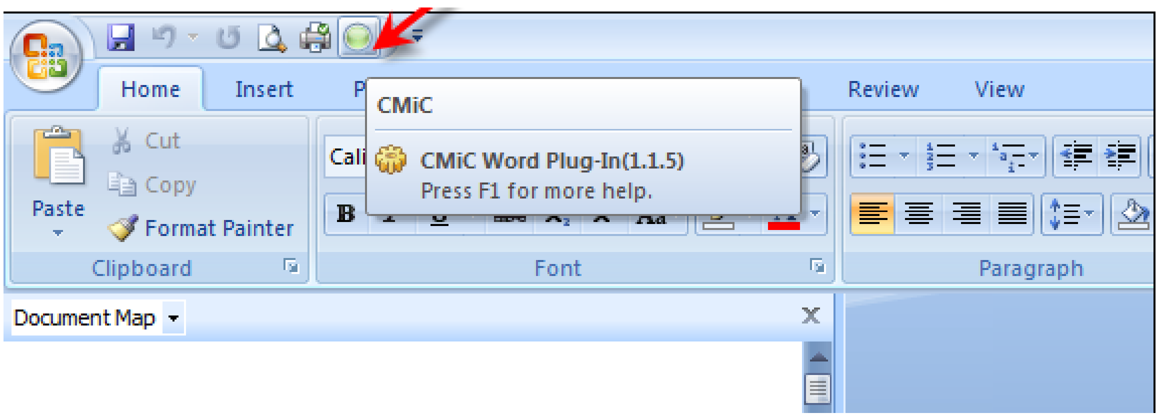
Checking In



CMiC ECM in MS WORD

Overview – ECM in Word

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

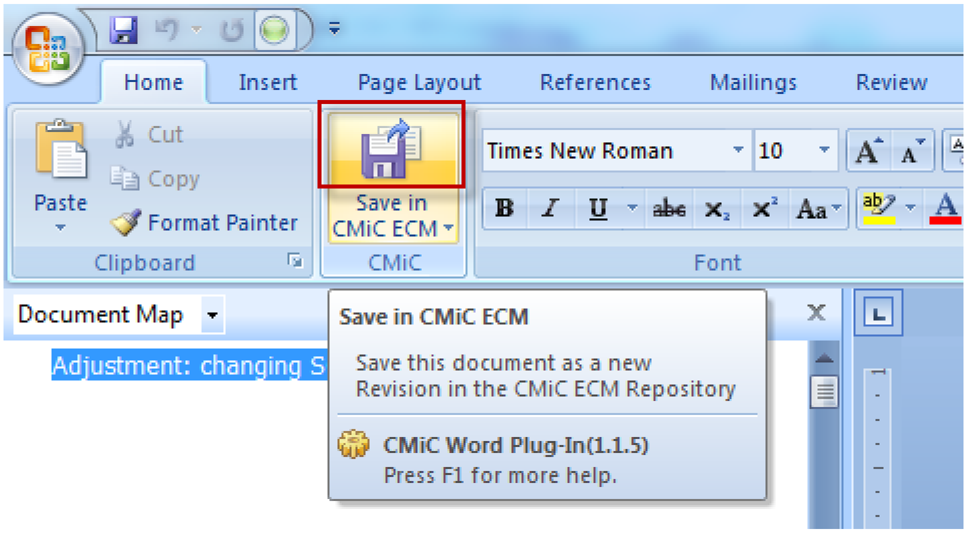


It provides an interface between CMiC objects (namely from Project Management JSP) and Microsoft Word, allowing the creation, modification and storage of documents within CMiC to produce multiple revisions and at the same time retaining the original document.

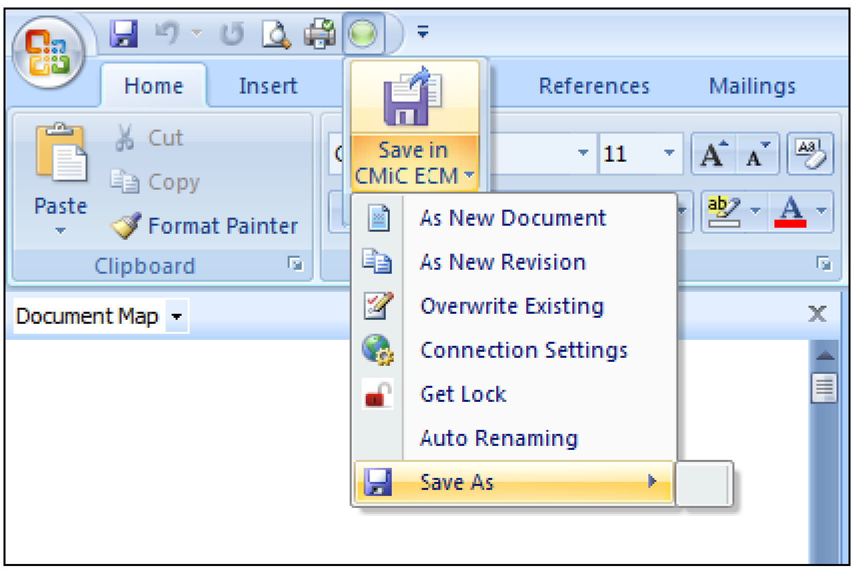
Activating the WORD Plug-In

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.

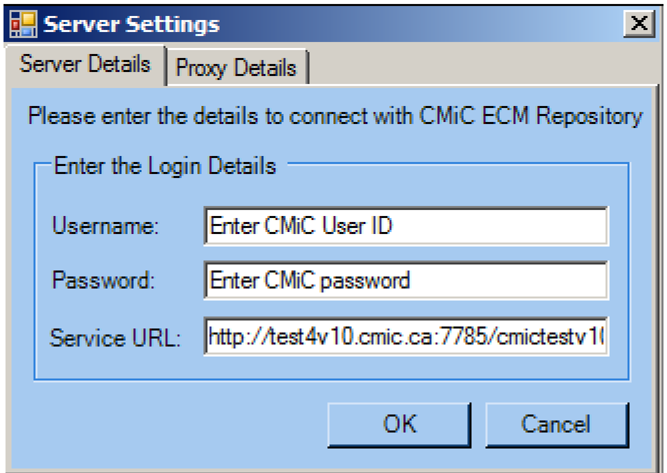
Click this icon to show the next icon which is separated into two parts - the diskette part allows the user to save the document without any additional saving options, and also displays the WORD plug-in version that is in use.



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:



Click [**OK**].

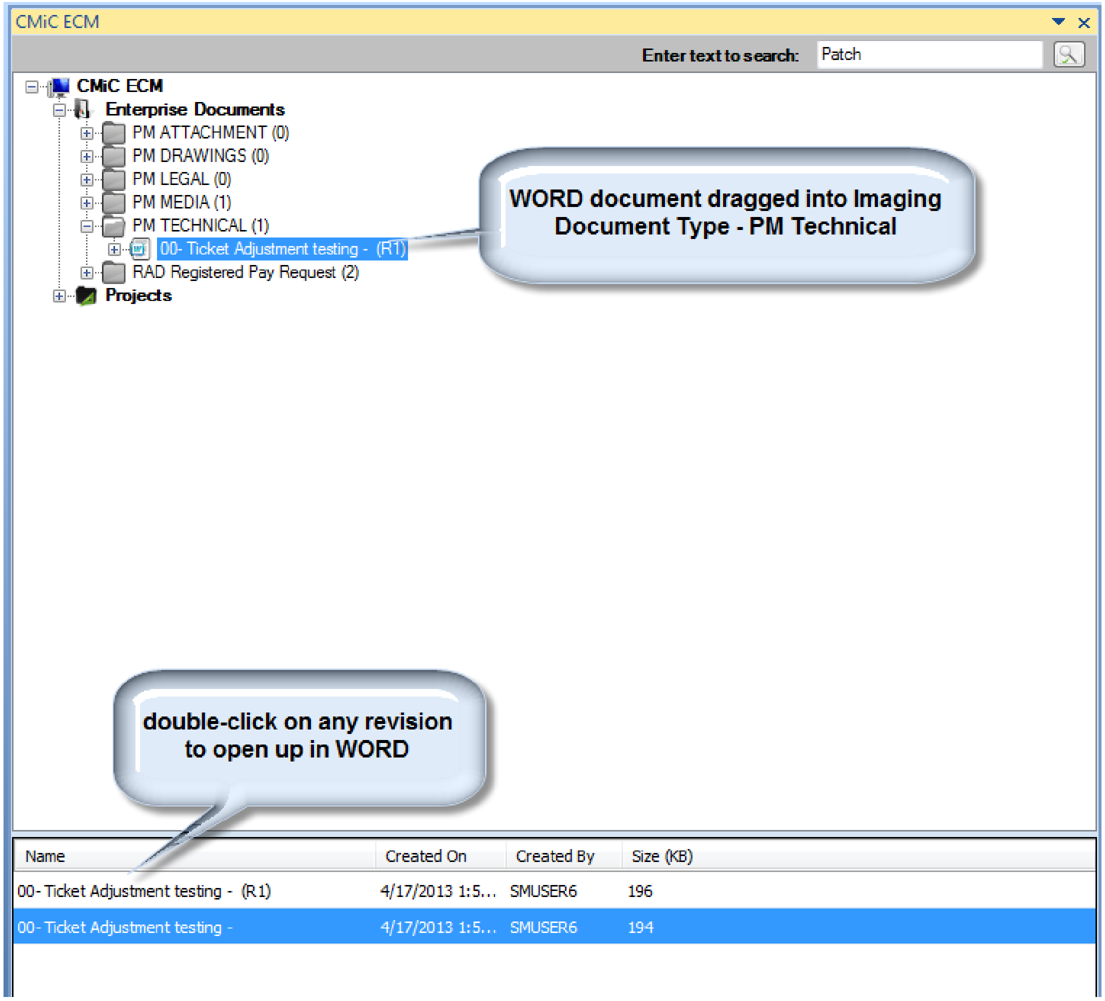
If the connection parameters are not correct, the system will inform the user later when the user tries to make updates during saving actions.

Activating the Document Types

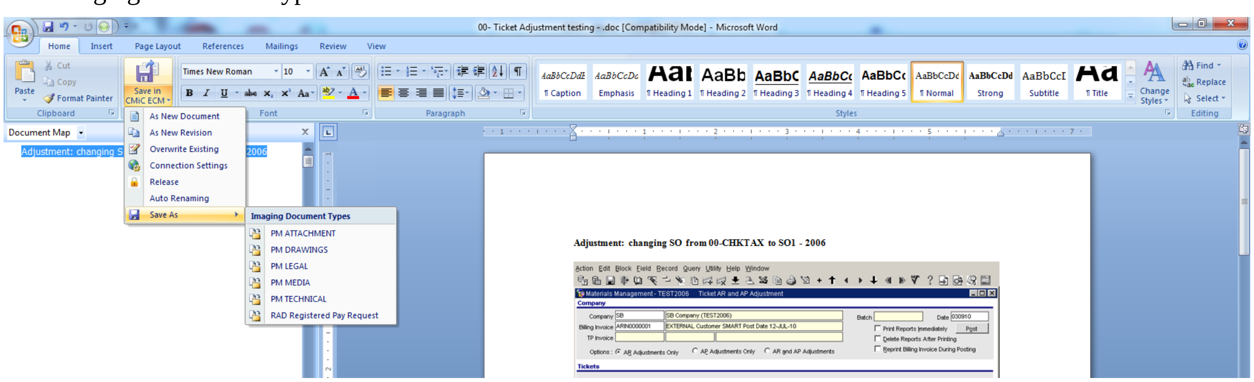
When Microsoft Word is opened after installing the plug-in, the Document Types are not initially shown (see 'Save As'). To get the Document Types active, open or print a PM object (Communications, RFI, PCI, Subcontract etc.) using an associated CMiC word template (created using the Microsoft Integration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



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 sub-menu 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:

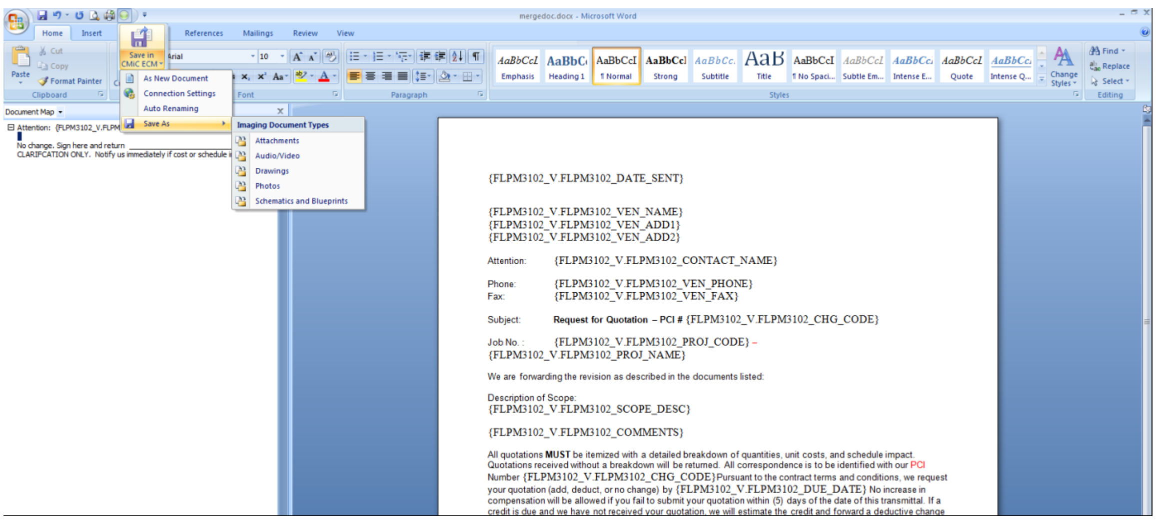
a) saved As New Document

b) saved As New Revision

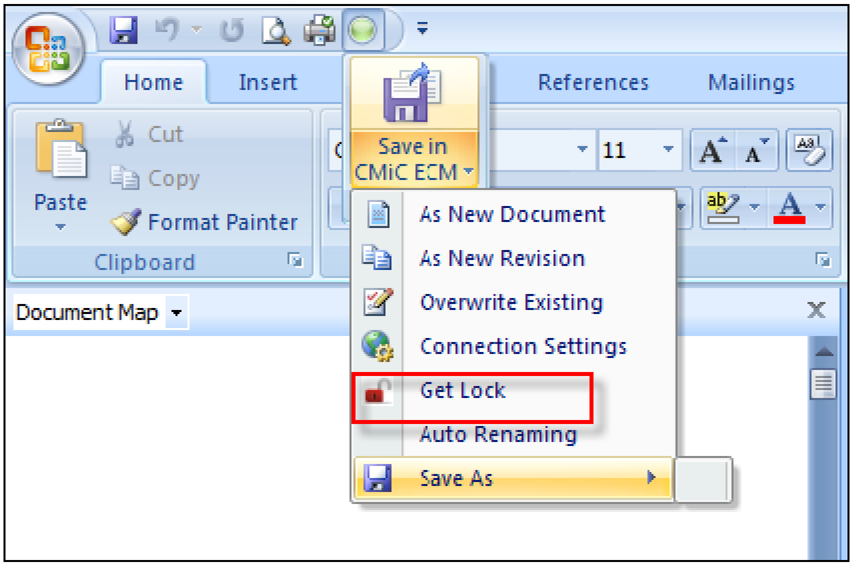
Both the original document and the revision are saved to the PM object.

Using the ‘Save As’ Option

‘**Save As’** allows the user to select the Document Type to which he wants the document saved.

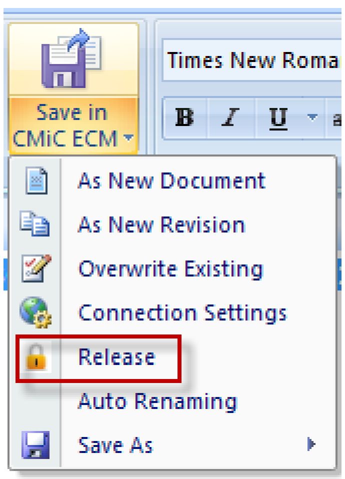


Document Locking



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 & Indexing

Overview – CMiC Search and Indexing

Search and Indexing are components of the Electronic Content Management module. These features are currently compatible with IE 9 and IE 10 browsers using Windows 7.

CMiC Indexer

The Indexer is useful in rebuilding indexes when changes have been made to the database structure, and also to improve search performance.

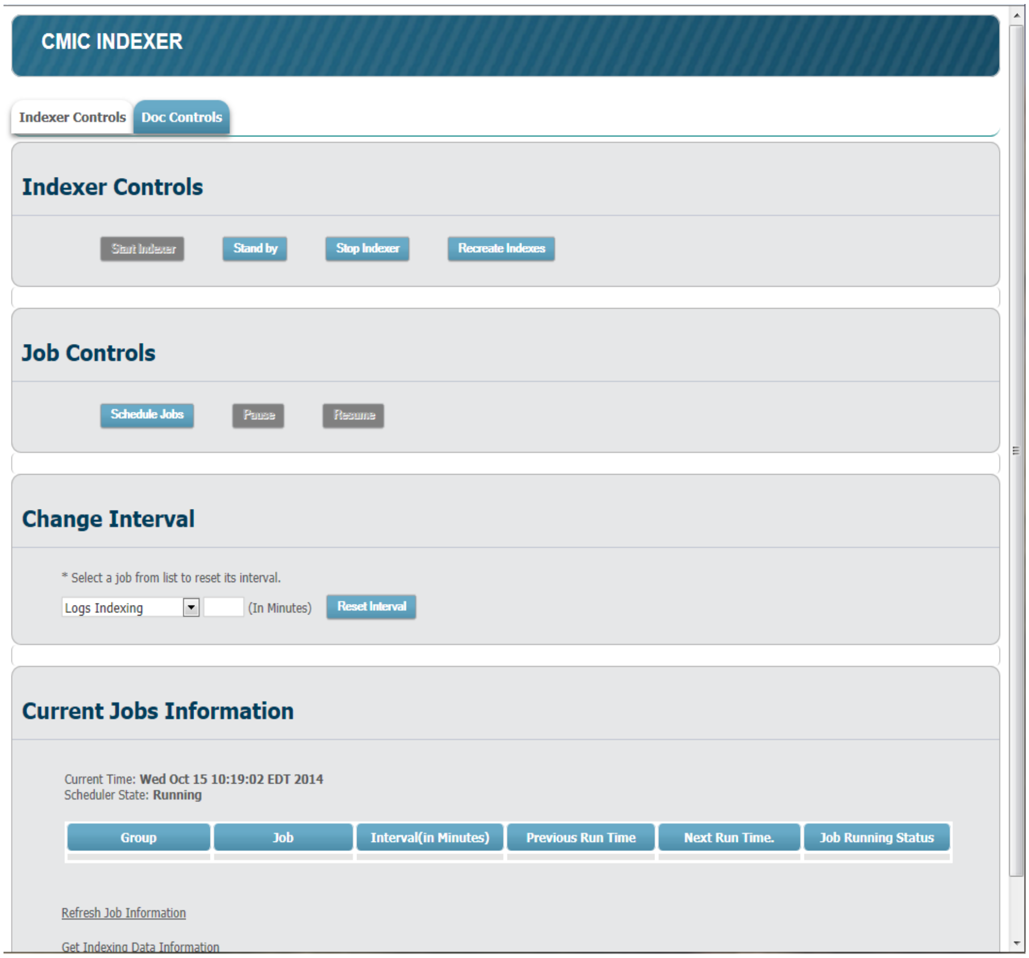
Launch the Indexer by typing the following URL in a new browser session, or manually add it to the Tree-View.

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

The Single Sign-On screen is displayed for user log in. Enter your login credentials.

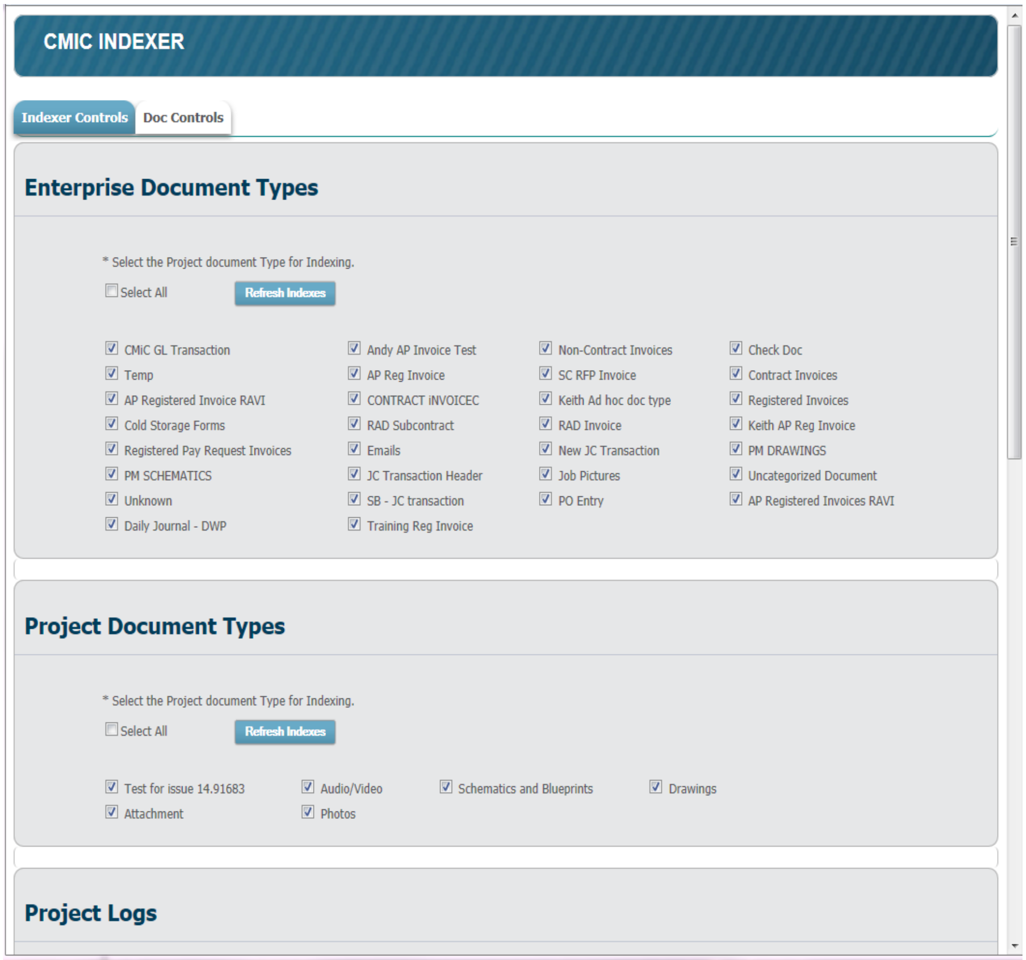
The Indexer Controls tab is displayed. The **Indexer Controls** tab is the main tab from which the indexer is executed and monitored.

Indexer Controls:



The **Doc Controls** tab is used to select the Document Types and Project Logs that are to be re-indexed. This action is expected to be carried out prior to starting the indexer.

Document Controls:



Using the Indexer

Click the **[Start Indexer]** button to initiate the indexing procedure. The '**Current Jobs Information**' section will display the current status of the process.

Click the '**Refresh Job Information**' link to see the latest status of the indexing procedure.

You can use the **[Stop Indexer]** button to stop the indexing procedure at any time.

When the Indexer has finished running, the running status changes from 'YES' to 'NO':

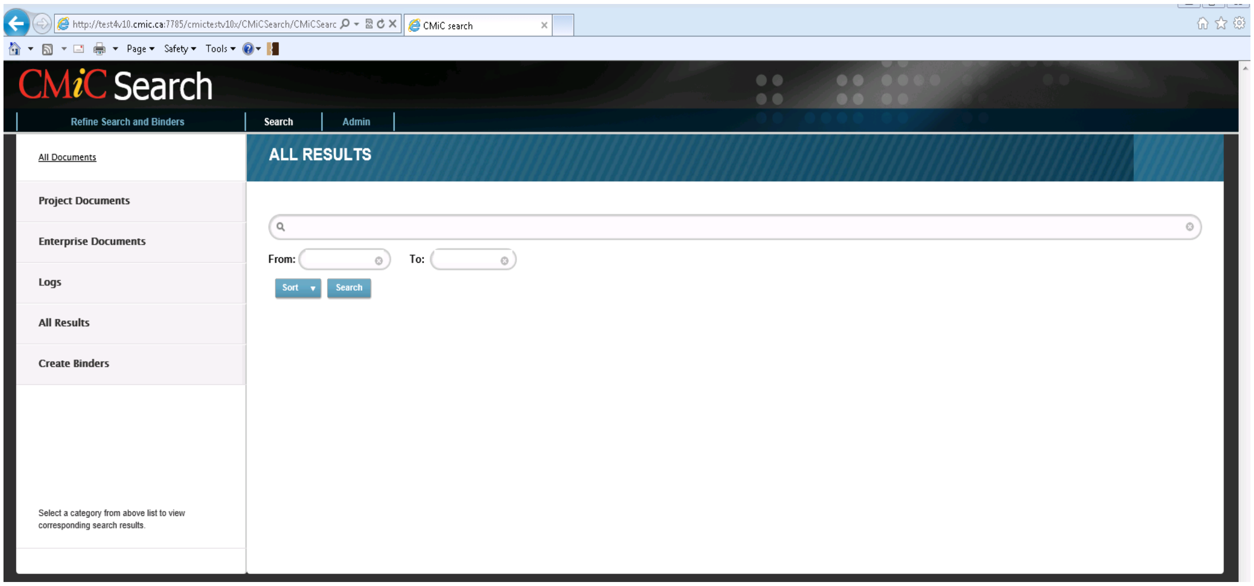
CMiC Search

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

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

The Single Sign-On screen is displayed for user log in. Enter your login credentials.

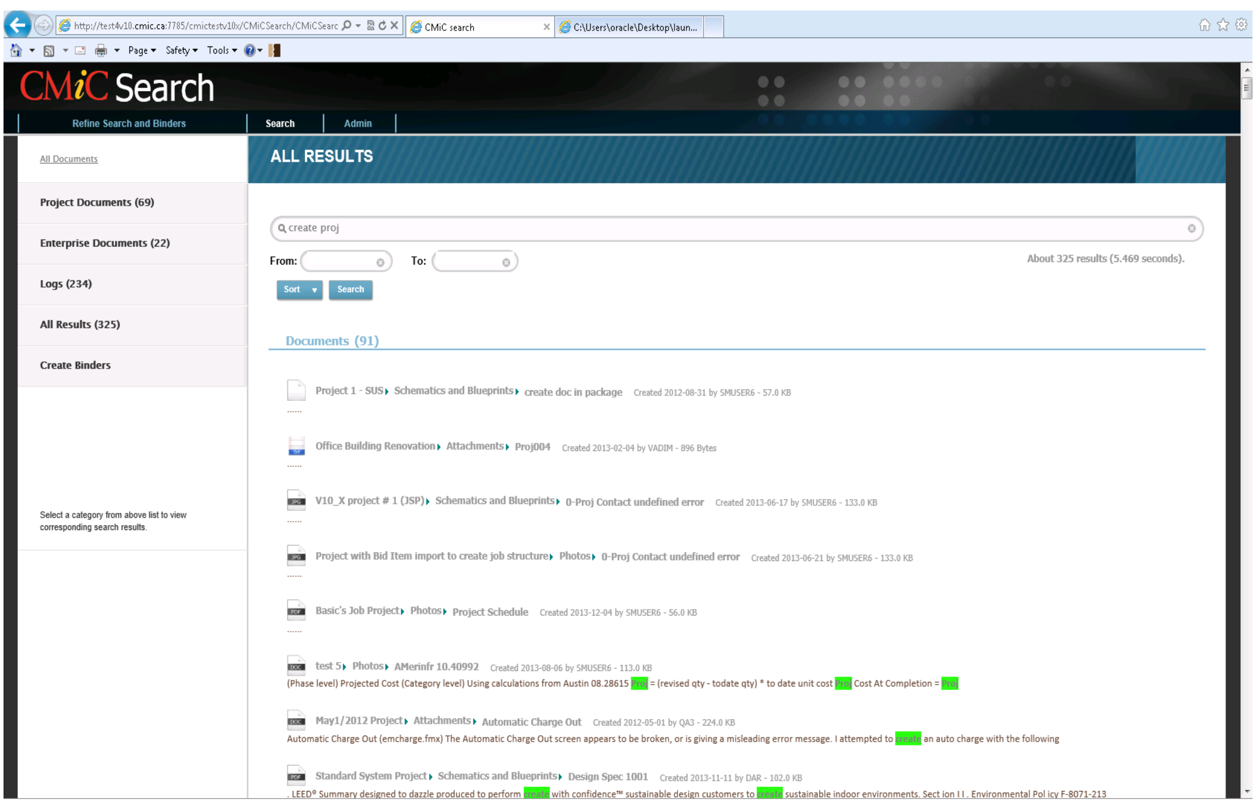
The following screen is displayed:



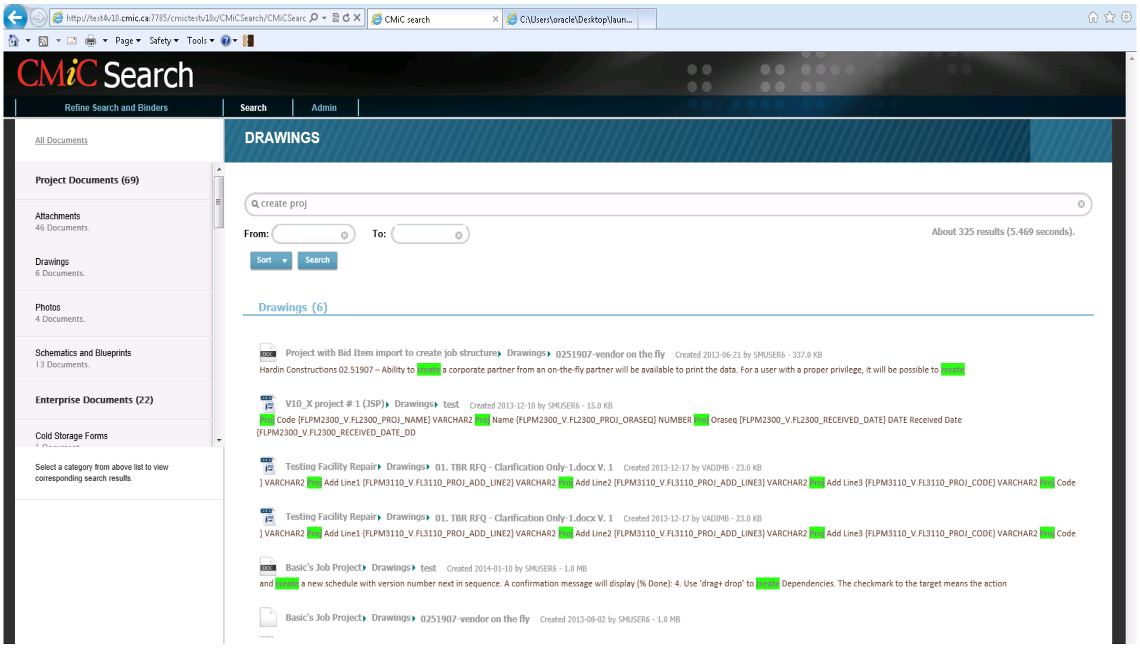
Enter the text to search beside the magnifying glass icon and press the 'Enter' key or click on the **[Search]** button. **DO NOT USE THE TAB KEY at this time as it is non-functional for this feature.**

Search results, if any, will be distributed appropriately to the four sections shown in the left column of the display: Project Documents, Enterprise Documents, Logs and All Results.

For example, if the search string "create proj" is entered, the results would show the following:



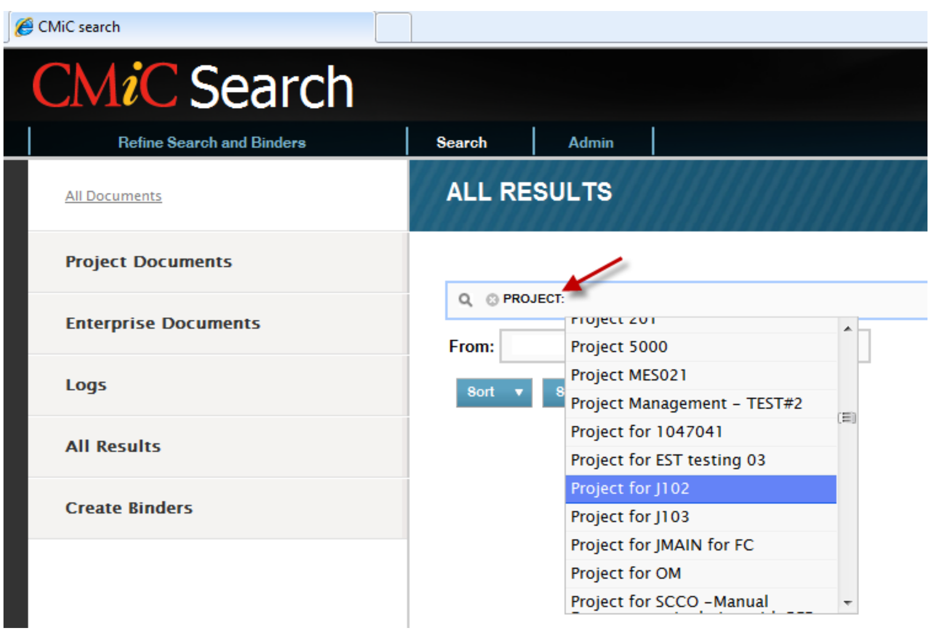
Clicking on the button for each category will give a further breakdown by document type or log type, and will show the records found for that type:



Clicking on a document icon allows you to ‘Download’ i.e. open the image, and clicking on the text beside the document icon gives you ‘More Information’, i.e. open up the record in JSP or Enterprise (Imaging).

Search Parameters

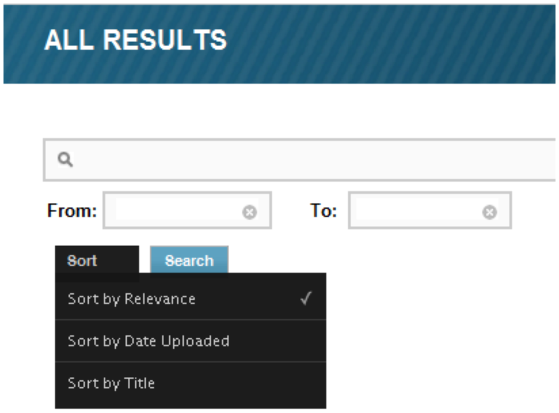
Search parameters are currently set up for **project** and **log**. If the word “project” (or part thereof) or “log” (or part thereof) is typed as a search string, CMiC Search will display a list of projects or logs from which the user can select the following text string to search.



Date parameters can also be entered. Click in the date fields (From and To) to get the calendar popup from which dates can be selected.

Sorting Search Results

Search results are sorted by the **Sorted by Relevance** sort order, by default. The user can change the sort order to either of two other options: **Sort by Date Uploaded** and **Sort by Title**:

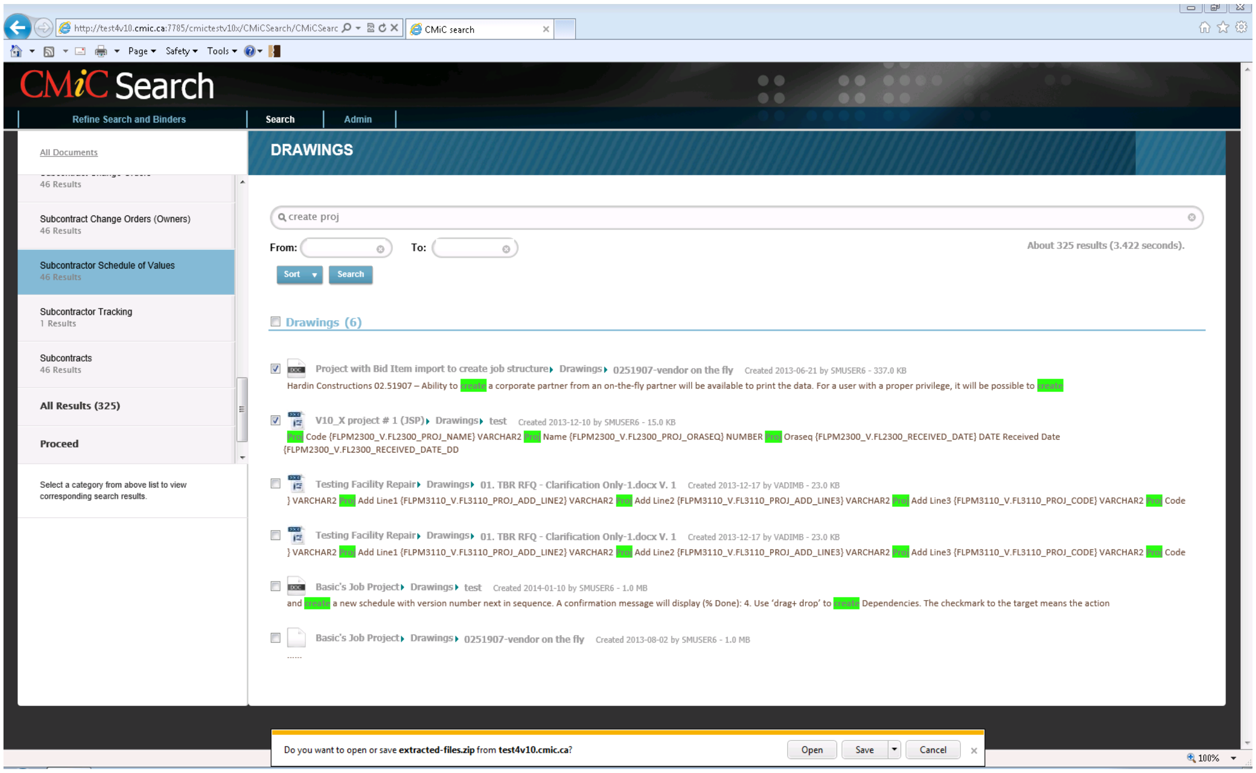


Creating Binders

This feature allows the user to create a zip file from a number of user selected document attachments, from search results.

The [**Create Binders**] button is applicable to Project Documents and Enterprise Documents. If the user is in any of these types at one of the lower levels and clicks the [**Create Binders**] button, checkboxes will be displayed to the left of every record in the search results for that document type. In addition, the Create Binders button has switched to the [**Proceed**] button.

Select one or more records and click [**Proceed**]. You will be asked whether you want to open or save the extracted files:



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

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

Stop Scheduler

<*Serverpath*>/SysRptParams/Schedule.do?stop

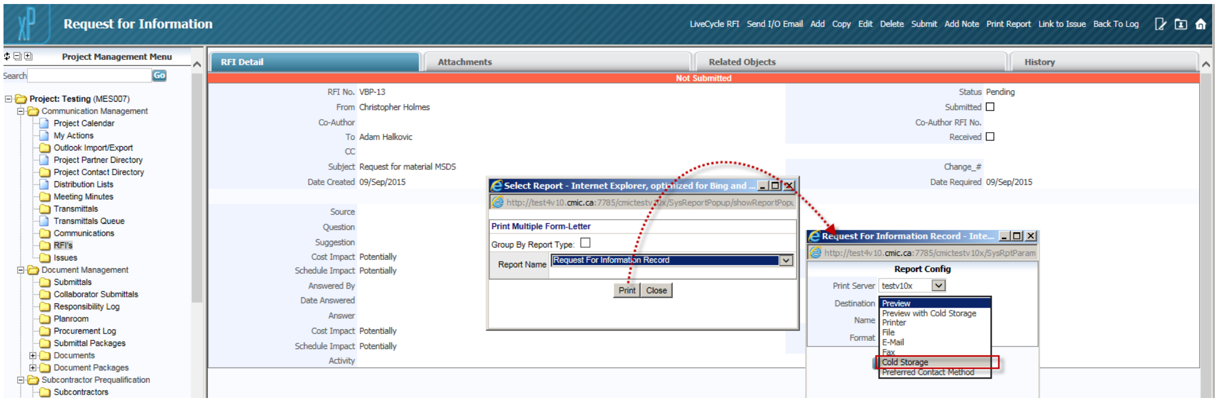
Get Status of Scheduler

<*Serverpath*>/SysRptParams/Schedule.do?status

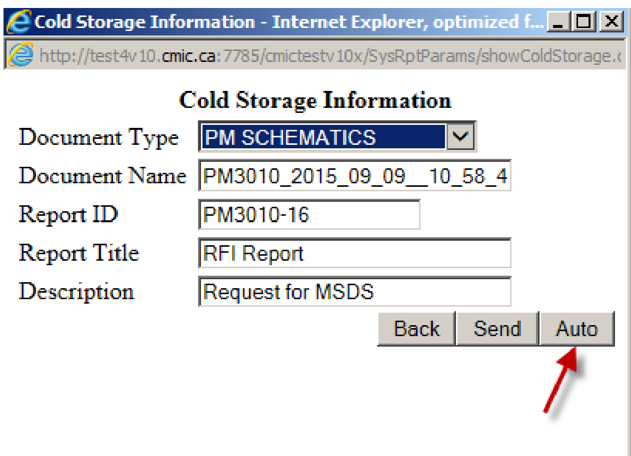
Defining Triggers for Automatic Report Generation

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

Step 1: Enter Report's Cold Storage Information

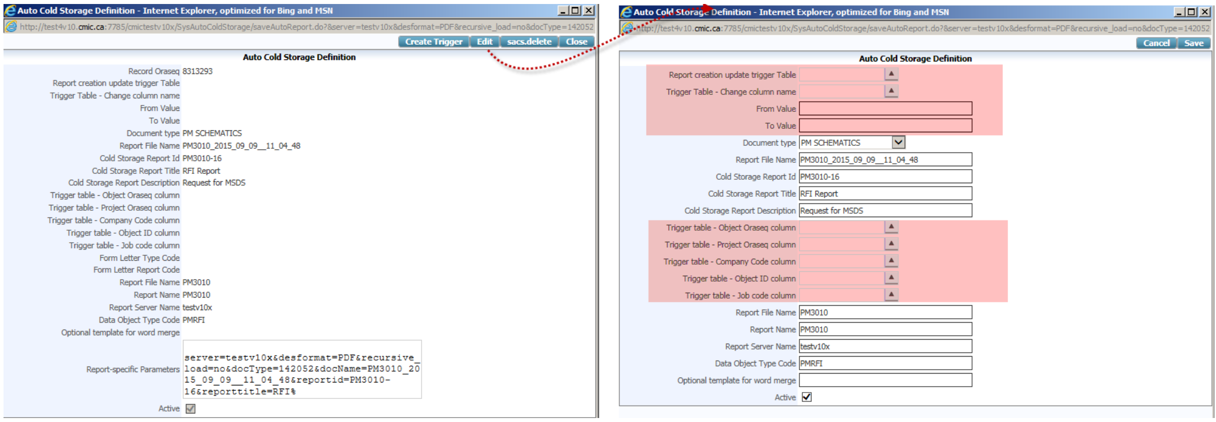


I) Run the desired report, and in the Report Configuration pop-up, select "Cold Storage" for the Destination field, as shown in the above screenshot, and click [Run Report].



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



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.

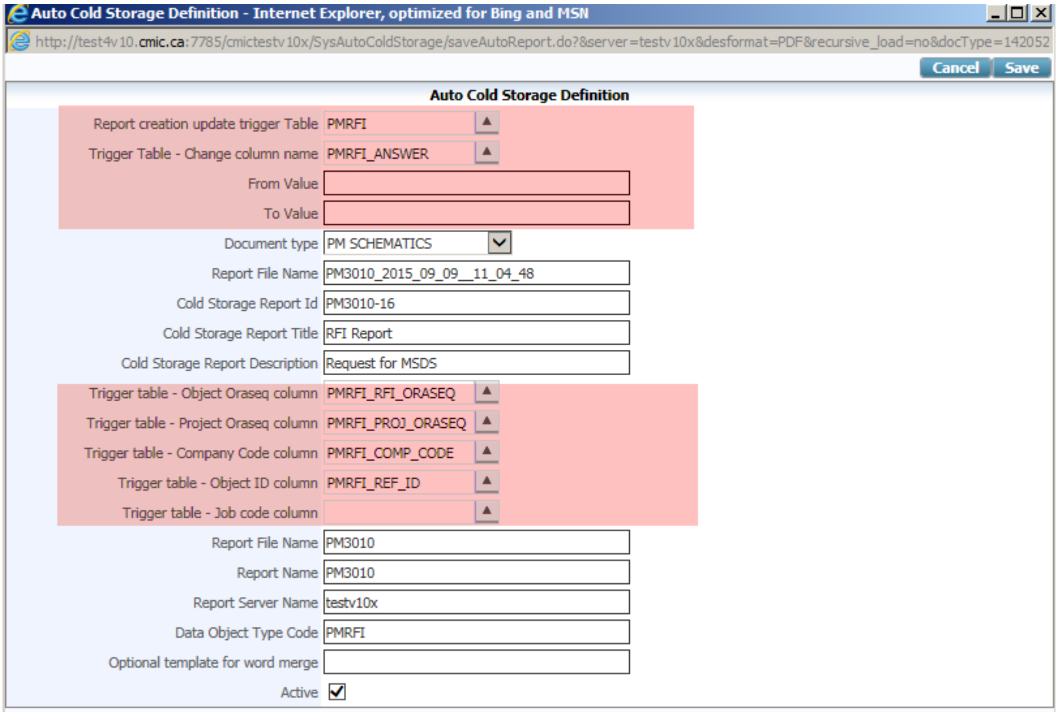
From Value, To Value

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.

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

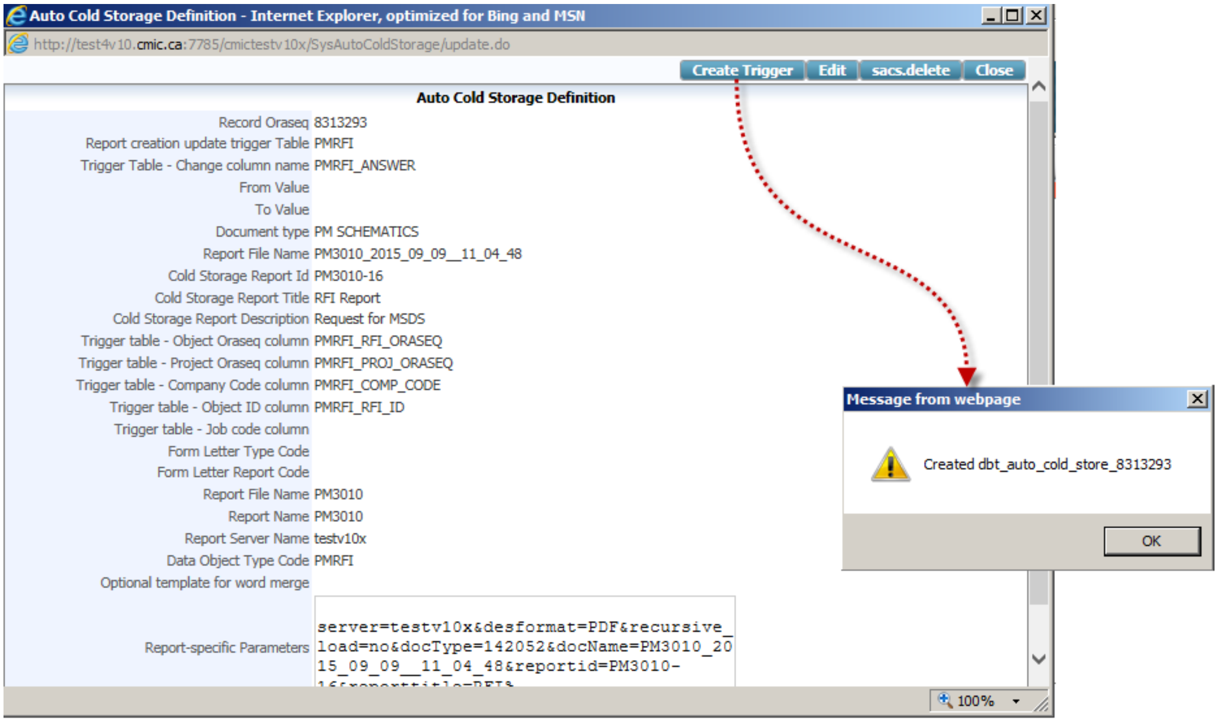


How Auto Cold Storage Definition Affects Trigger Logic

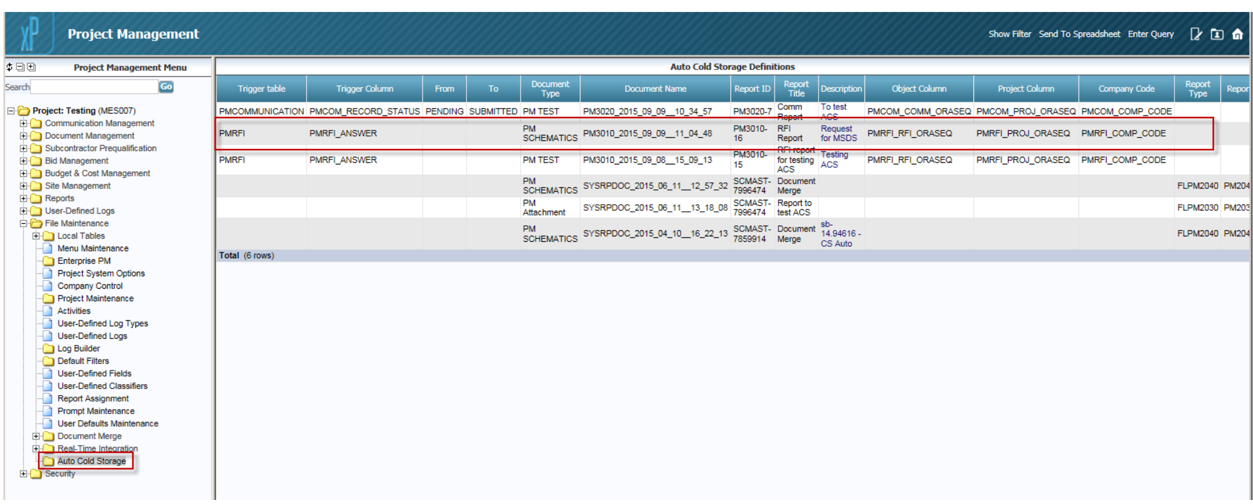
Auto Cold Storage Trigger Column Definition		**Values of the Column in the Updated Table**	
Old Column Value	**New Column Value**	**Launch Workflow when the old column value is**	**… and the new column value is**
Null	Null	Null	Not null
Null	Specified value	Null	Specified value
Null	Specified value	Anything 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:

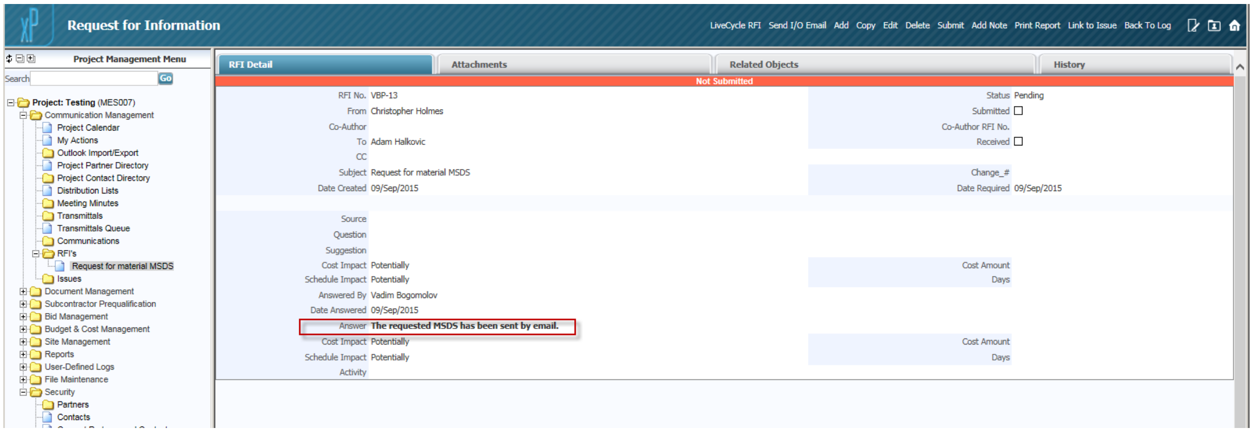


Upon clicking [**OK**], a new Trigger Definition record appears in the Auto Cold Storage Definitions log screen, in the File Maintenance node of the Tree-View, as shown in the left pane of the below screenshot. To customize the column headers, their order and visibility, the Auto Cold Storage Definitions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



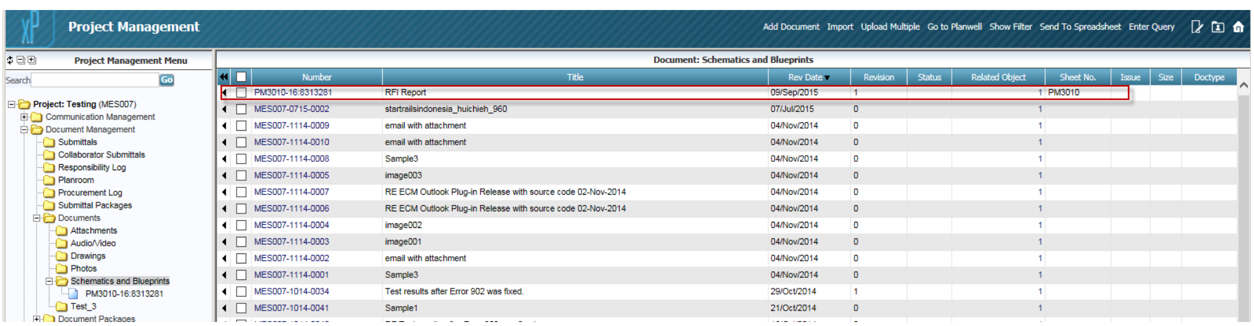
Sample of Auto Cold Storage Definitions Log screen, containing entries for each newly created trigger.

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:

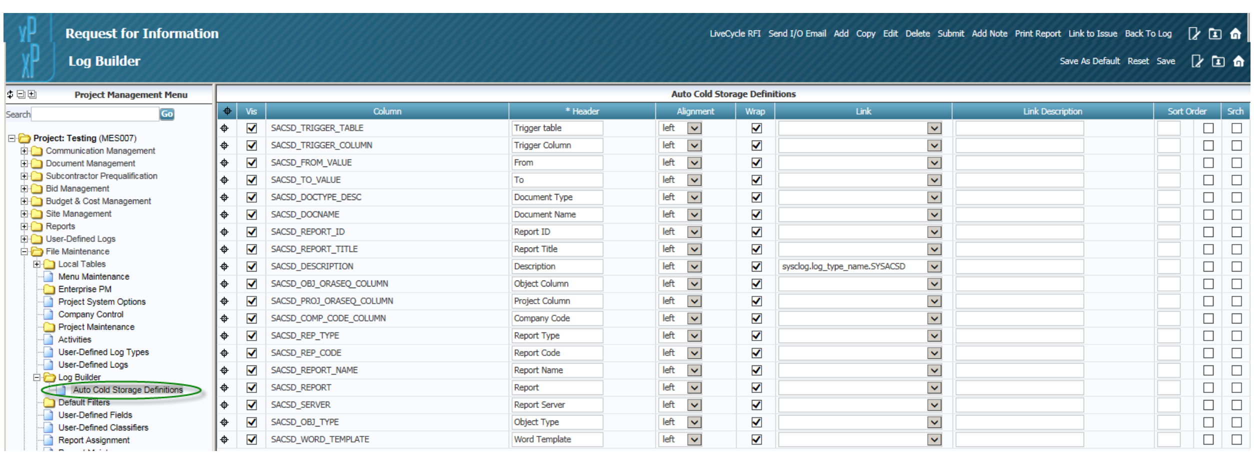


The report, as an RFI document, is added to the **Attachments** tab in the specified folder:

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



Log Builder for Auto Cold Storage



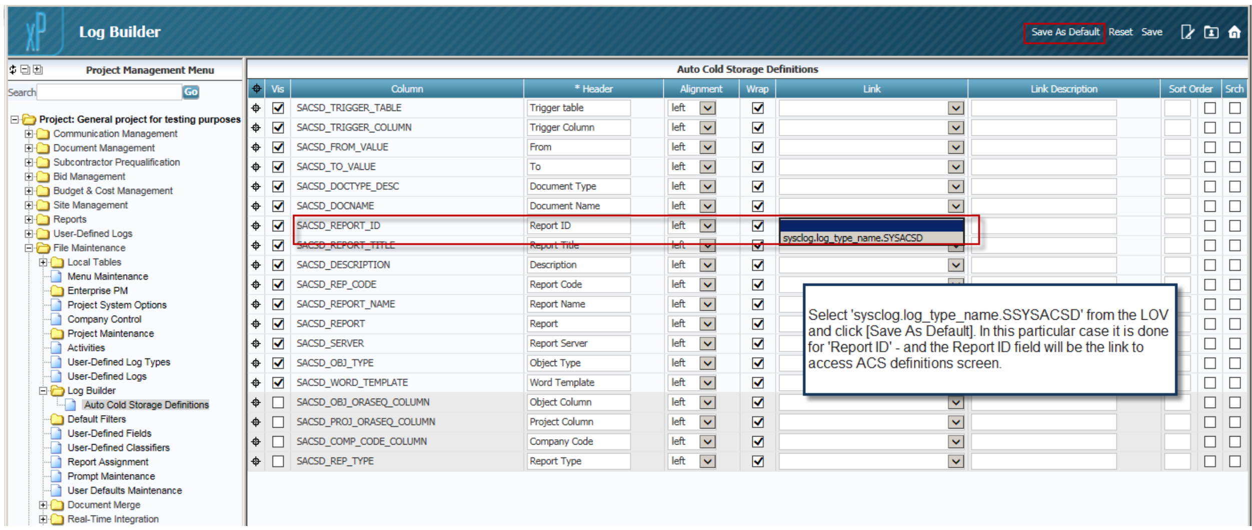
Sample of Auto Cold Storage Definitions screen, used to customize the Auto Cold Storage Log screen.

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.

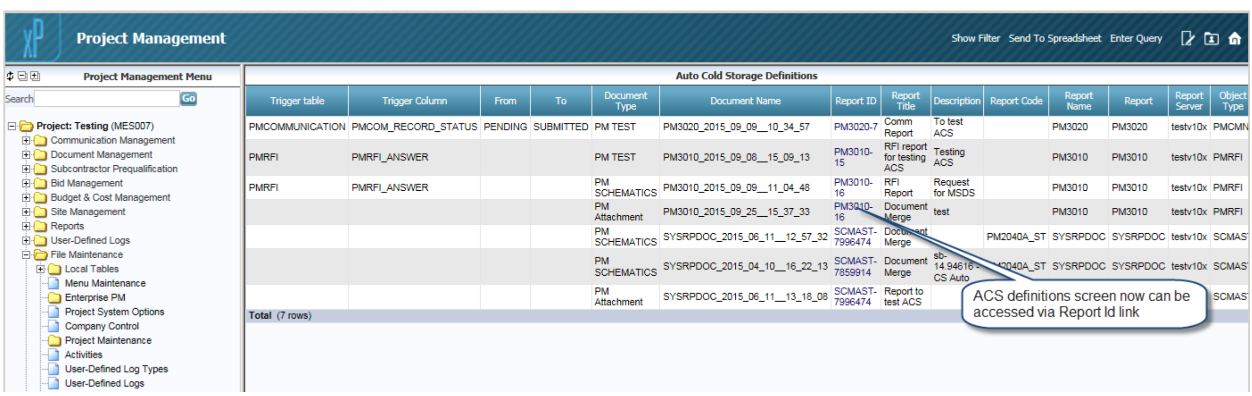
NOTE: Access to the Auto Cold Storage Definitions screen is determined by the user's security settings.

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.log_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**].



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



ECM Explorer

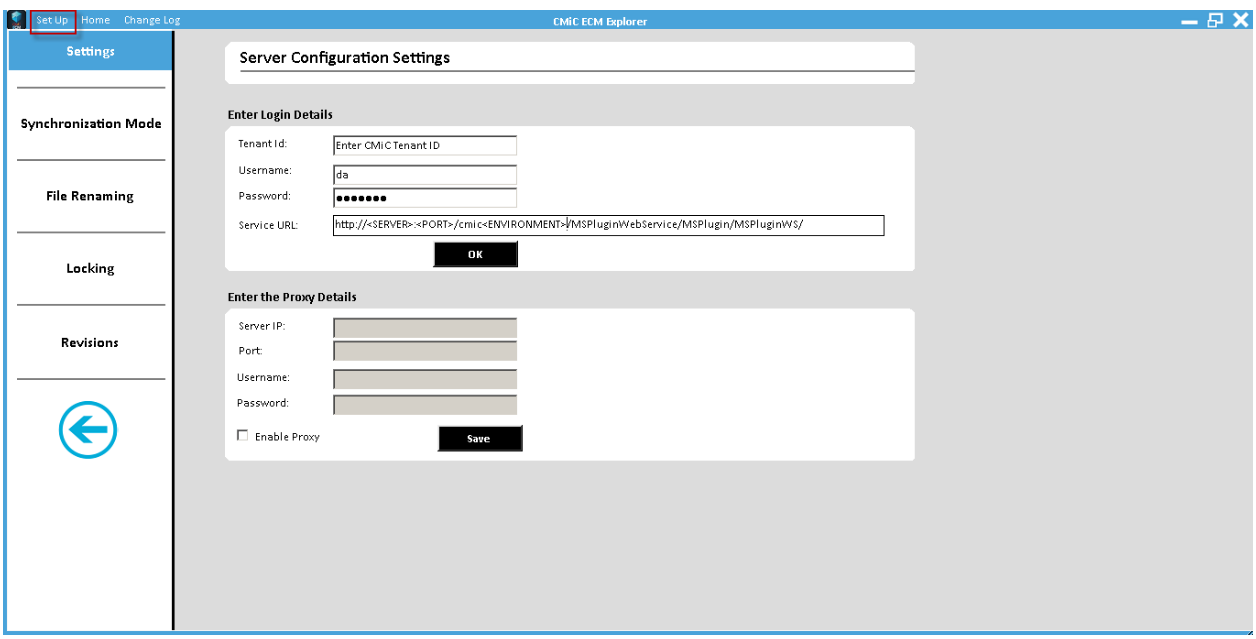
Installation

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

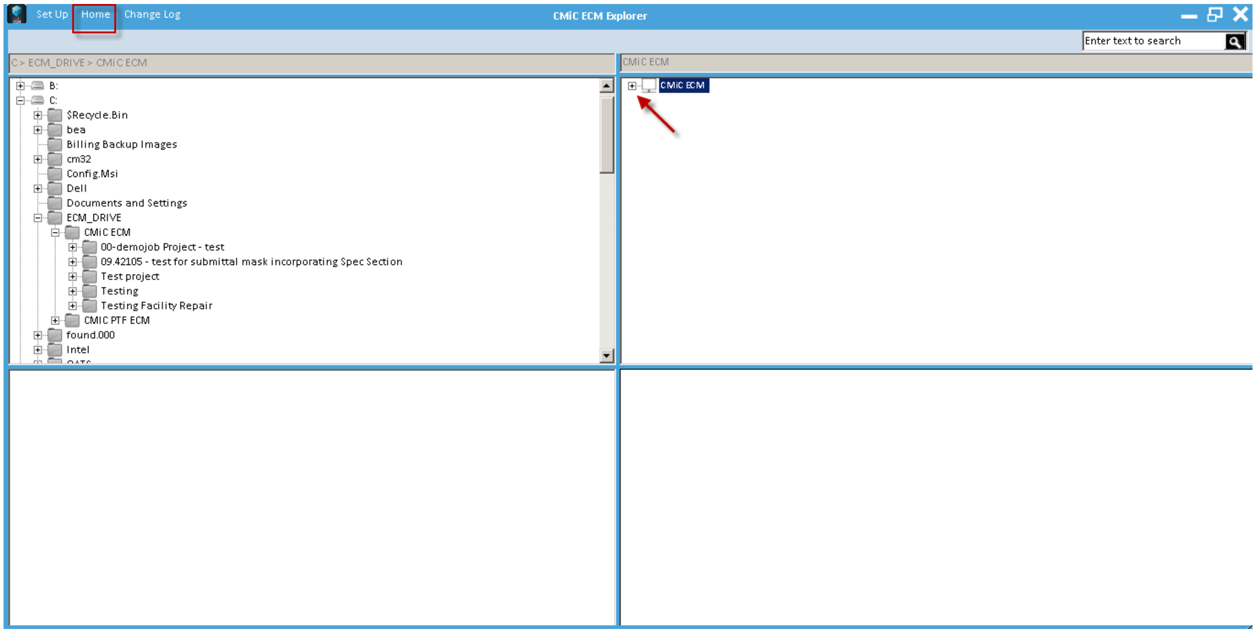
Settings

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

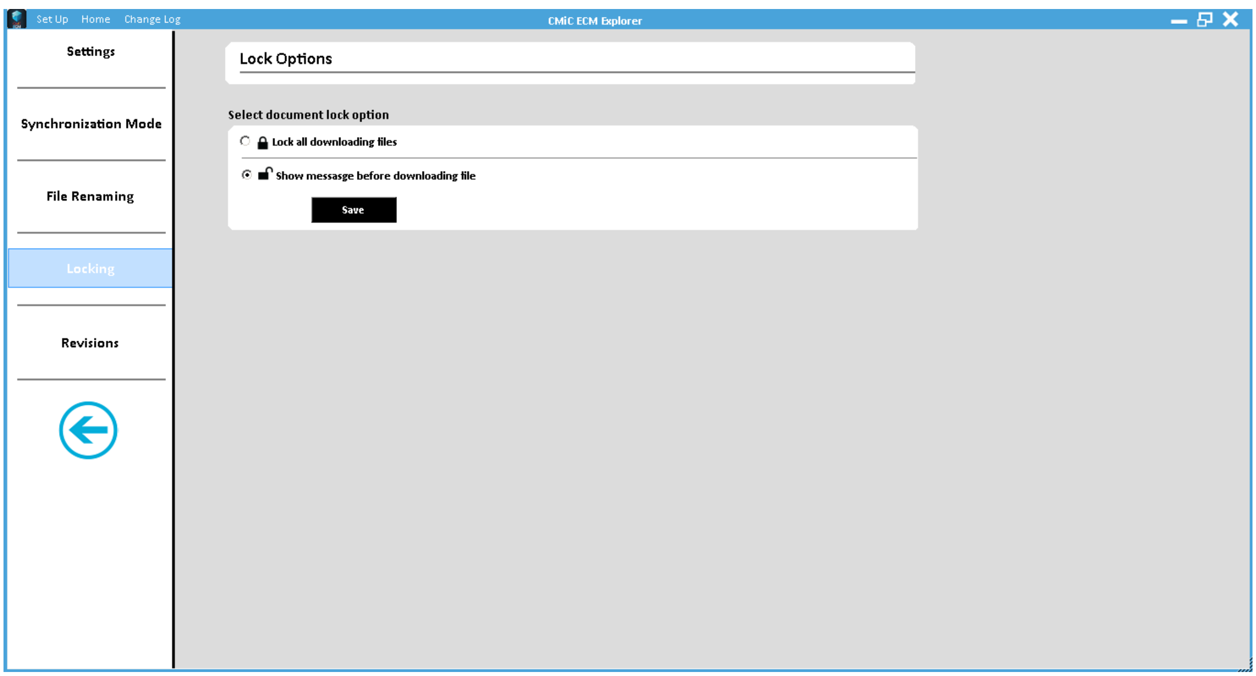


Enter Single Sign On user ID, password and applicable URL for ECM service and click [**OK**].

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



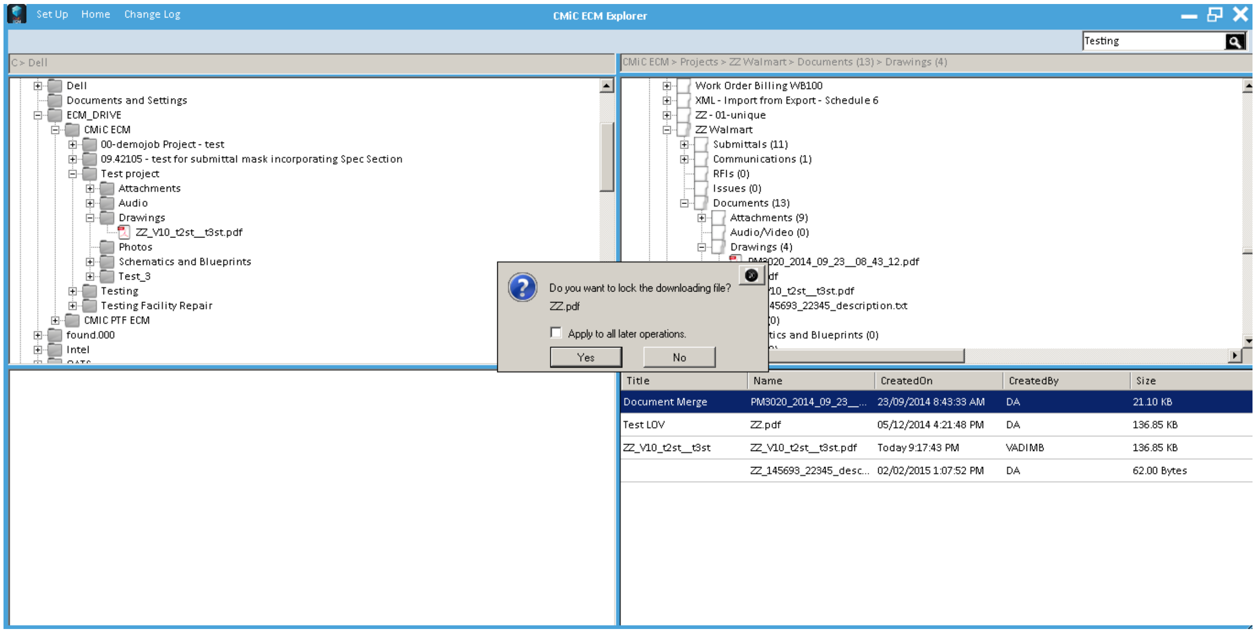
Locking



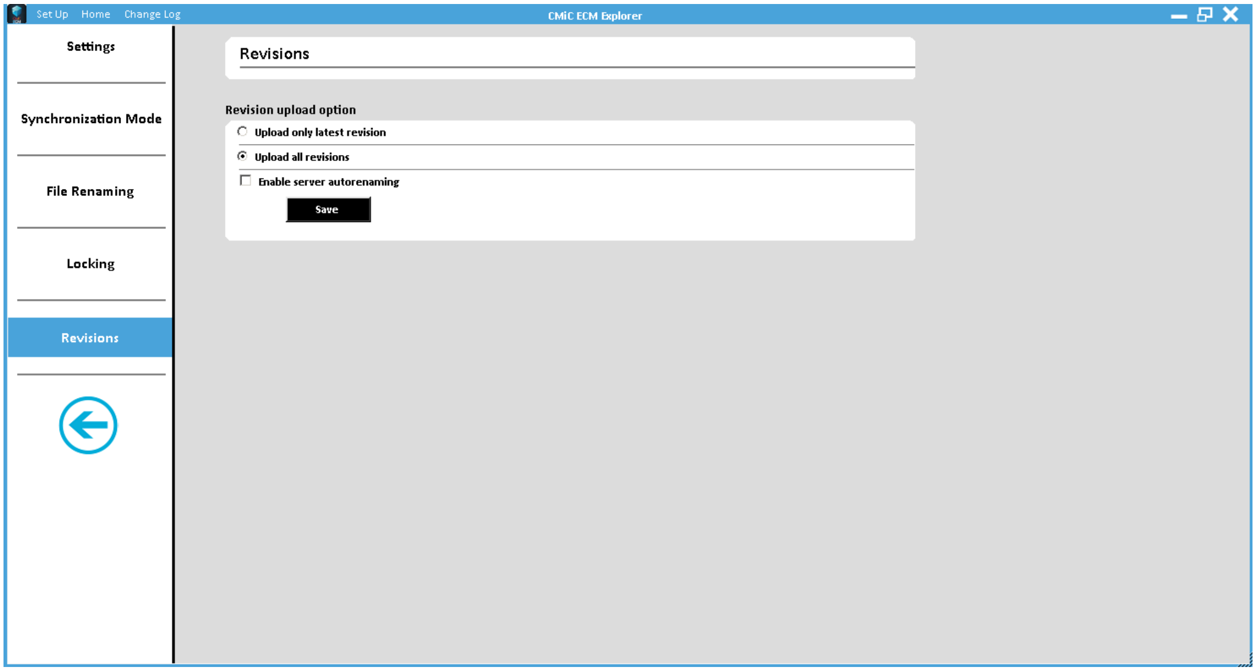
Files which are being downloaded can be locked/unlocked based on this setting.

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

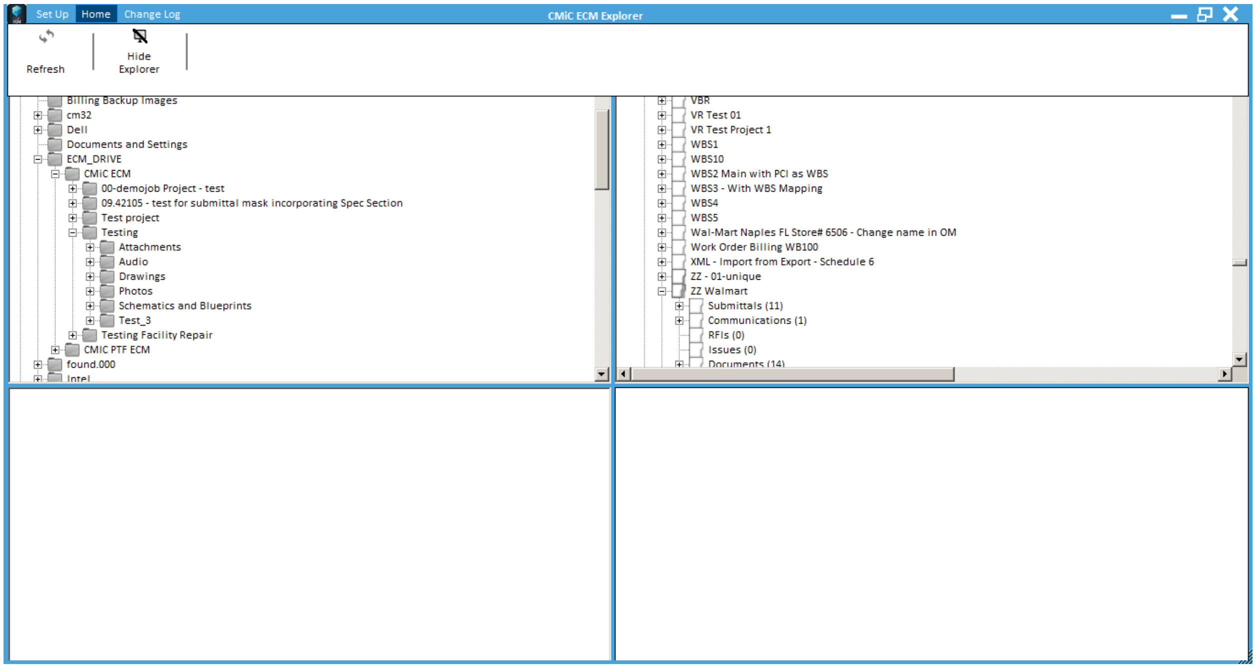


There are two revision options for the documents to be uploaded:

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



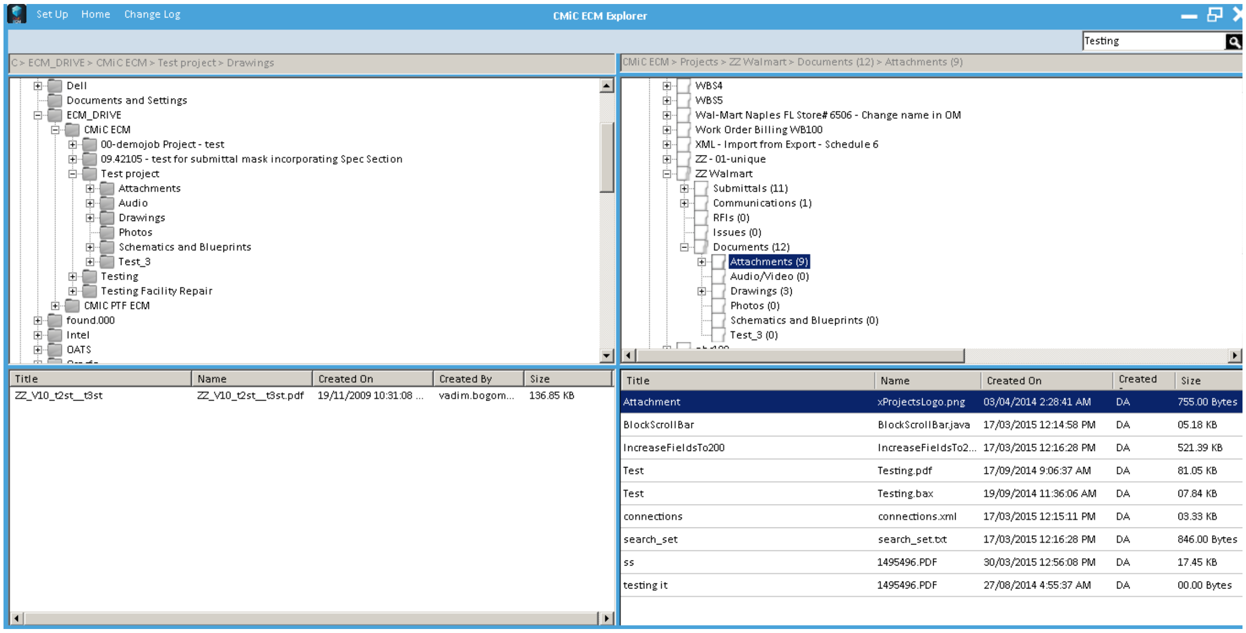
There are two controls on the Home screen:

[**Refresh**] – Button

Updates the ECM treeview content in the panes.

[**Hide Explorer**] – Button

Removes the local drive pane.

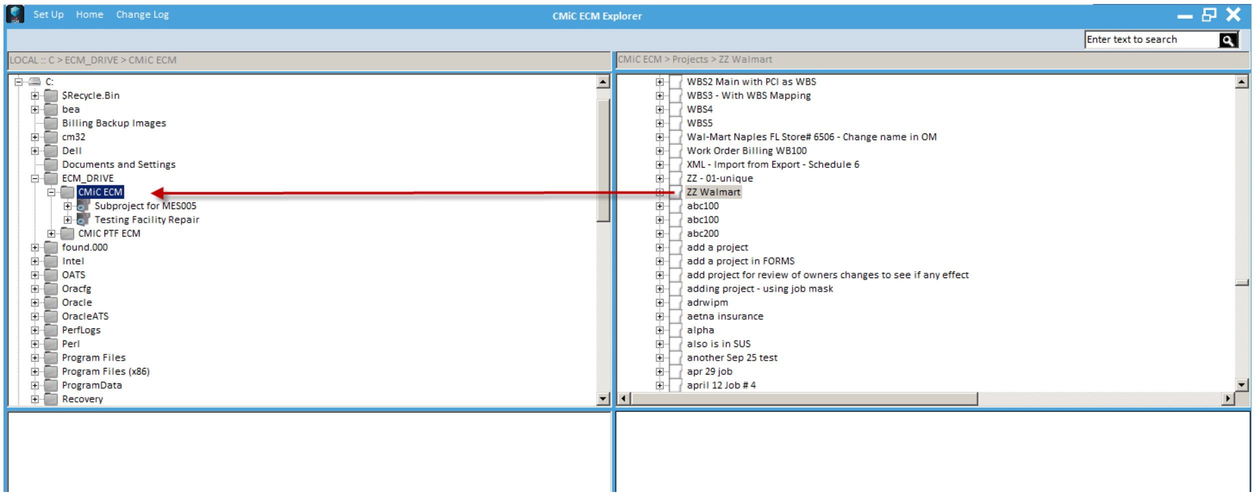


The main window is split in 4 panes. The top-left pane shows the treeview of the local drive. The ECM treeview from the server is displayed on the top-right pane. The bottom panes show details for the selected items.

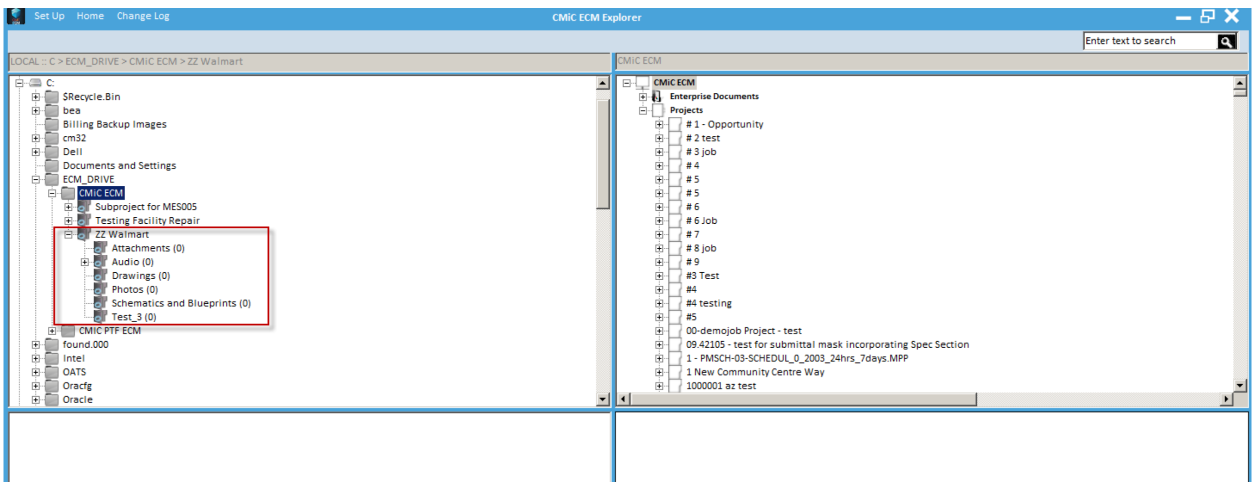
Document Synchronization

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

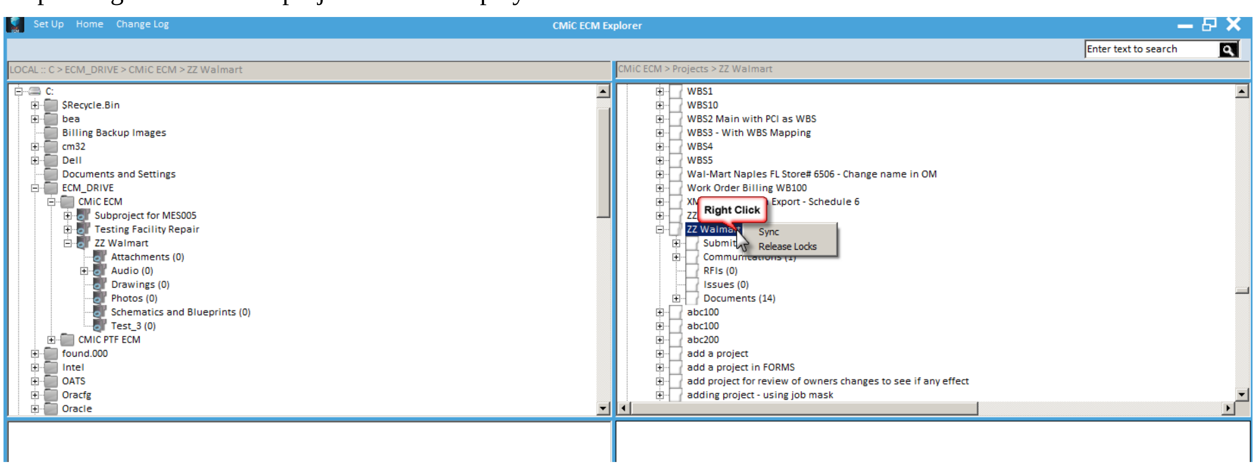
Step 1: Create folder for the project – drag and drop the project node to the ECM folder on the local drive:



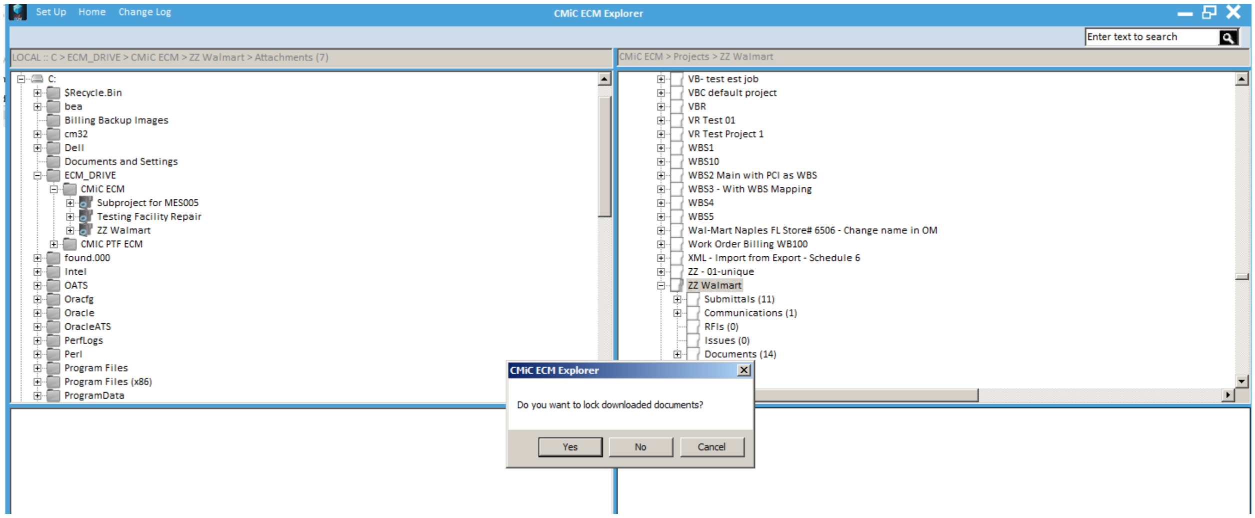
This operation creates the document folders structure (without documents) for the project as it exists on the server:



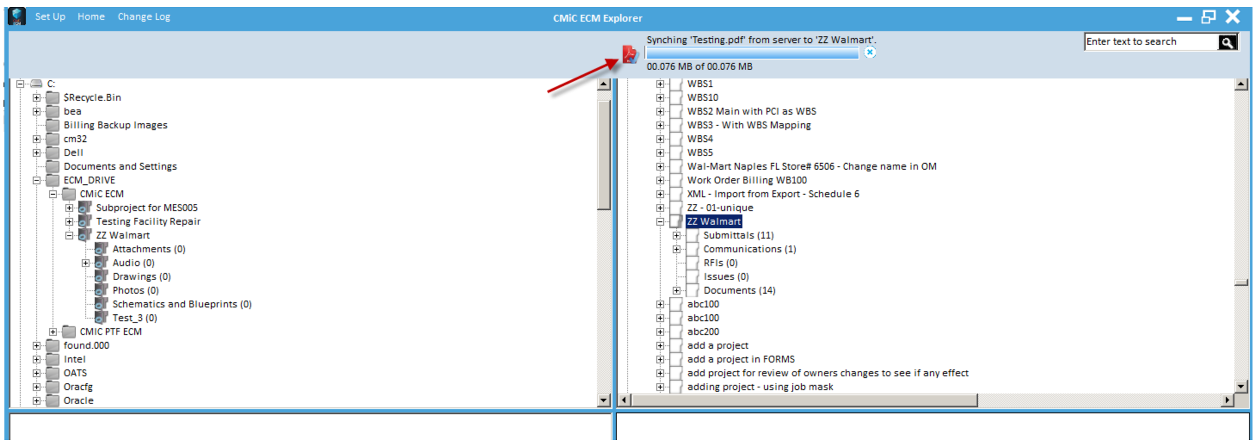
Step 2: Right click on the project node to display the context menu:



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 syncronization:



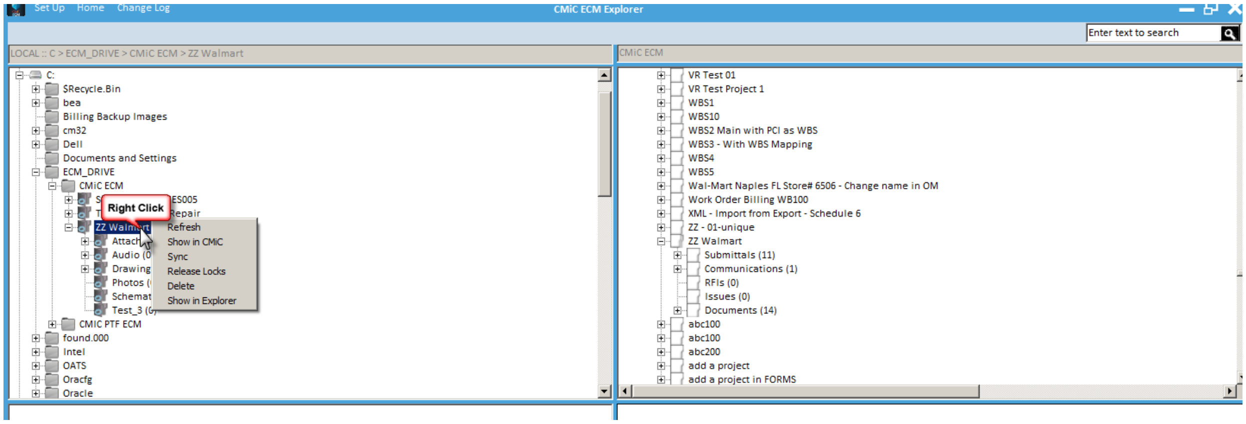
File Operations

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**



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.

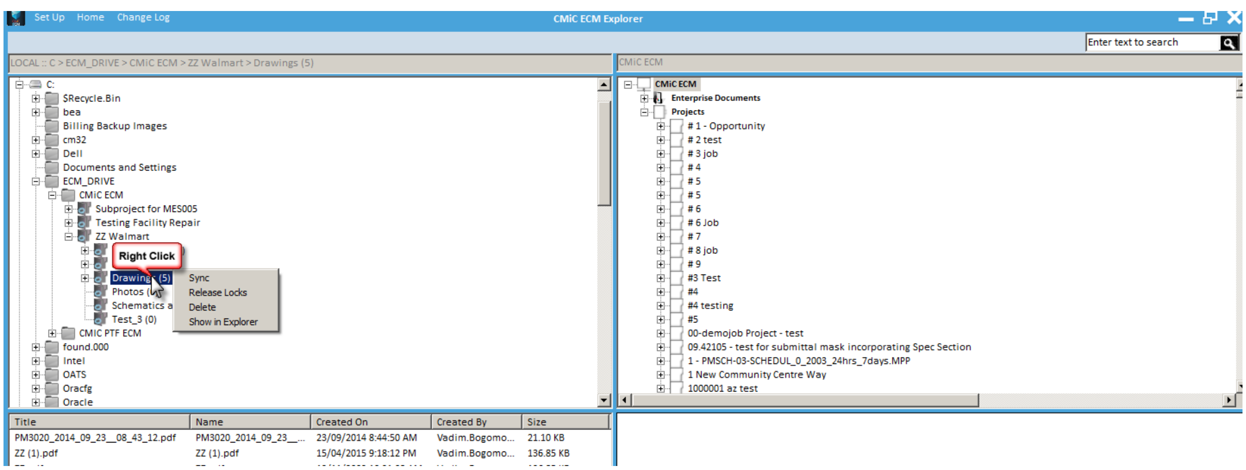
Synch: performs the document syncronization for current project.

Release Locks: unlocks the documents.

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

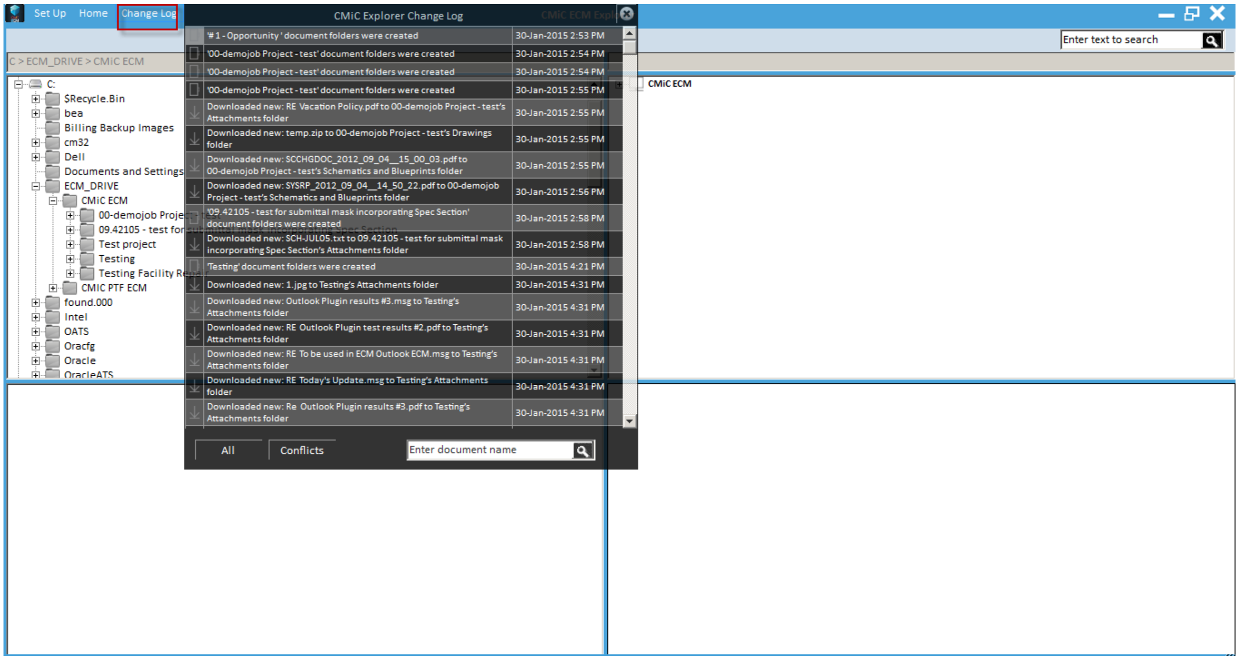
Show In Explorer: shows the current folder in Windows Explorer.

2. **For Document Folders**



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.

CMiC Mobile Approvals for Android

Setup – Settings Screen

The Setup screen can be accessed via the **Settings** menu on the top-right of the login screen:

LOGIN SETTINGS – Section

Tenant ID

If you are a CMiC Cloud client, this setting must be on. It turns on/off the multitenancy mode of the application. The **Tenant ID** field will be displayed on the login screen, and it needs be entered to log into the multi-tenant environment.

SERVER CONFIGURATION – Section

Server

The Approvals app does not use the Mobile server like Mobile Field and the other mobile apps. It connects to an app server. The URL will be the root URL of what the user sees when looking at their Workflow Notifications screen in desktop, excluding the environment. For example, if their browser shows http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole?_adf.ctrl-state=yrbefigvb_6, then for Mobile Approvals the root URL will be http://test4v10.cmic.ca:7785/cmictestv10x/. Without the environment, the URL will be http://test4v10.cmic.ca:7785/.

> **NOTE**: For MDM portals, the XML tags that the CMiC Approval app supports are:
>
> • publicCloud - for public cloud URL
> • environmentURL - for server URL

Environment

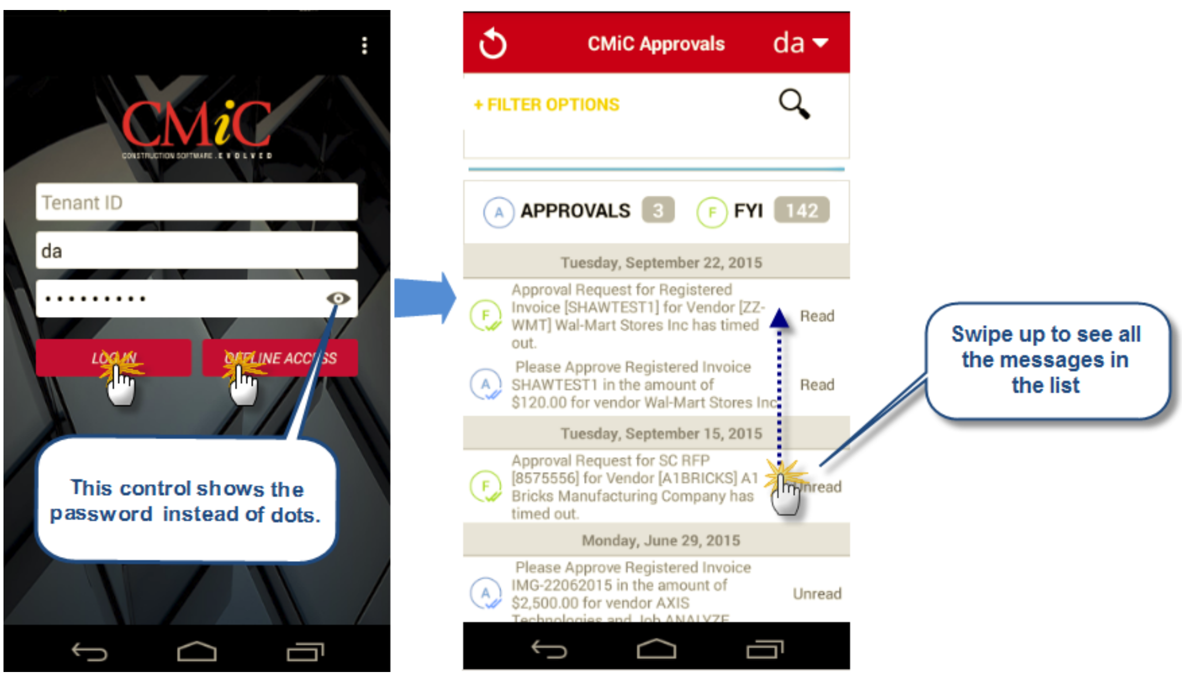
Enter the part for your environment. Please contact the administrator for configuration of the mobile server access for your company.

PROXY SETTINGS – Section

If the application requires access to the proxy server, set the **Enable Proxy** switch to **ON** and enter the credentials to access the proxy server.

Login

Enter the **Tenant ID** (for CMiC Cloud clients), the **Username** and **Password** that you use to access CMiC Enterprise, and tap [**LOG IN**].



If there is no network connection, use the [**OFFLINE ACCESS**] button to access the workflow notifications list which was loaded in the previous online session. All changes will be saved to the devices and uploaded to the system when a connection becomes available.

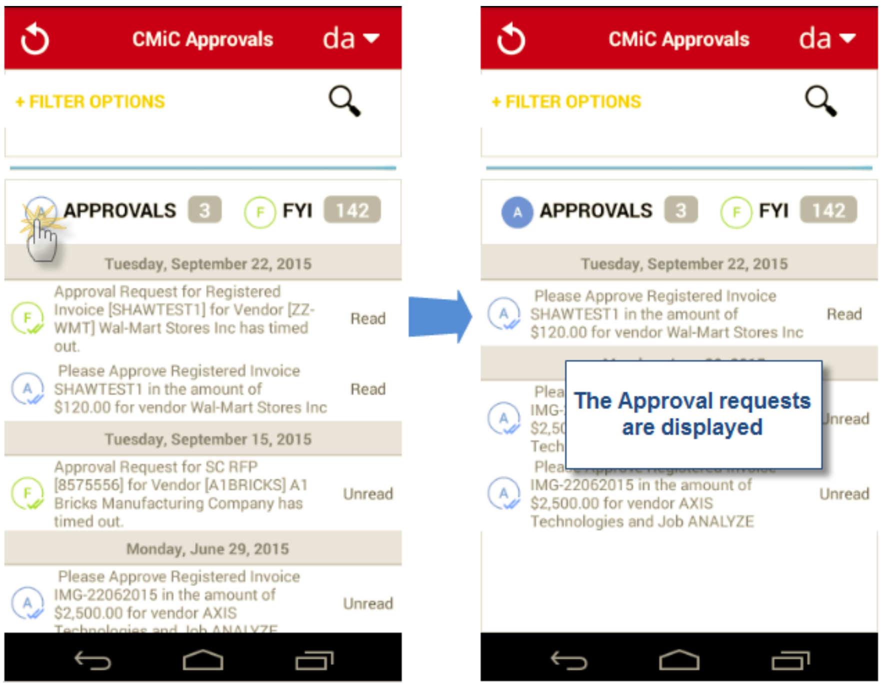
Main Screen

The main screen displays list of the approval requests and FYI messages sent to the user.

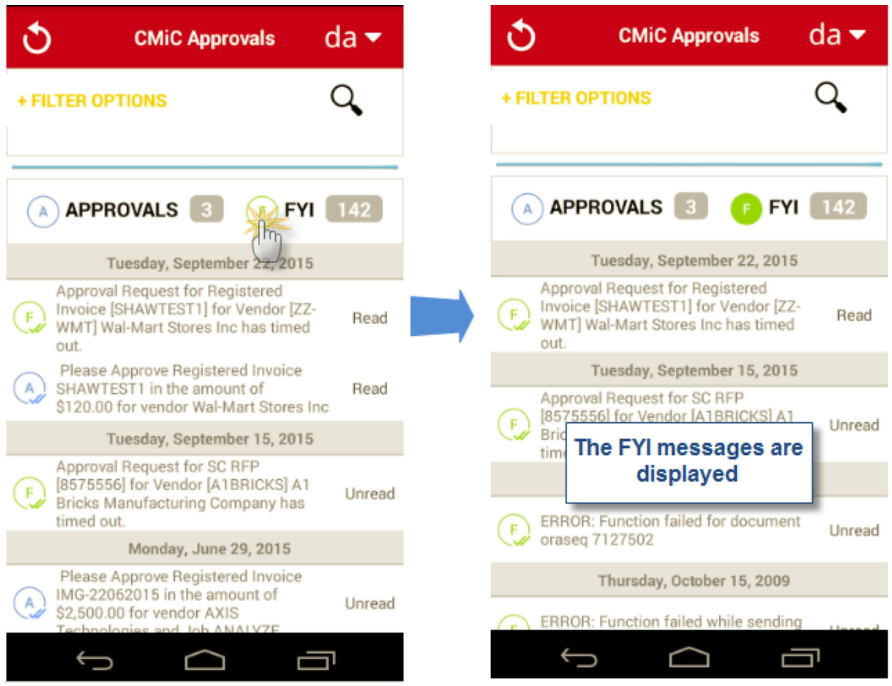
Filter Options

Three filters can be applied to the list:

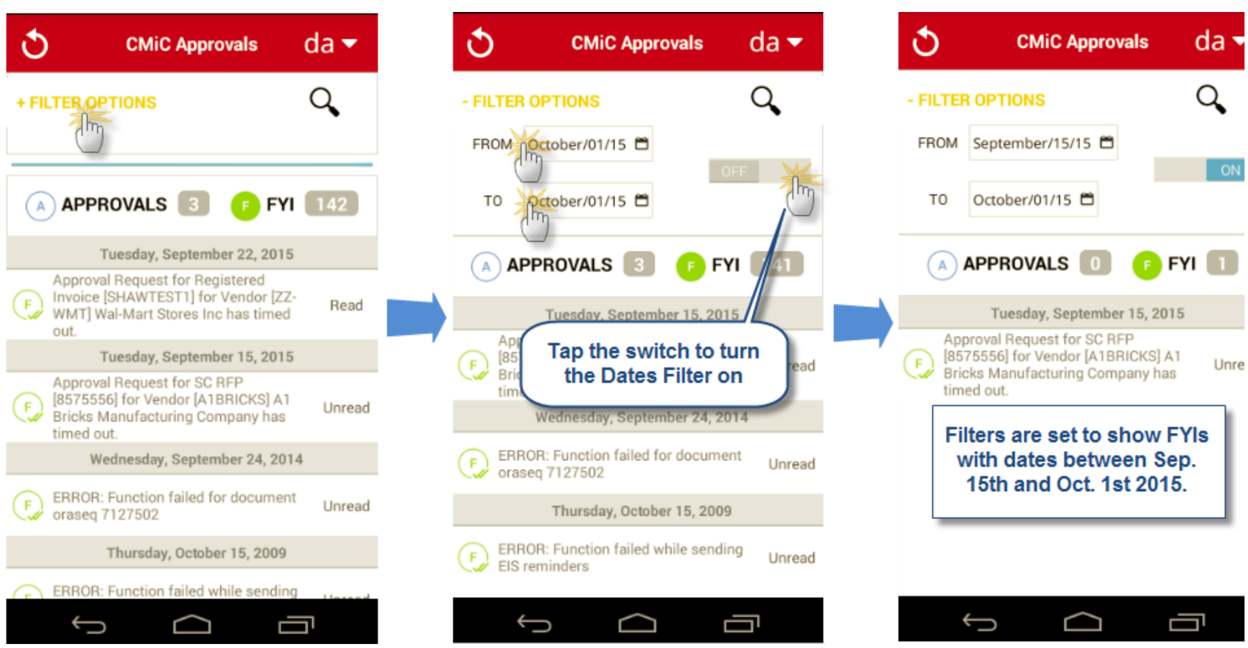
Display Approval Requests



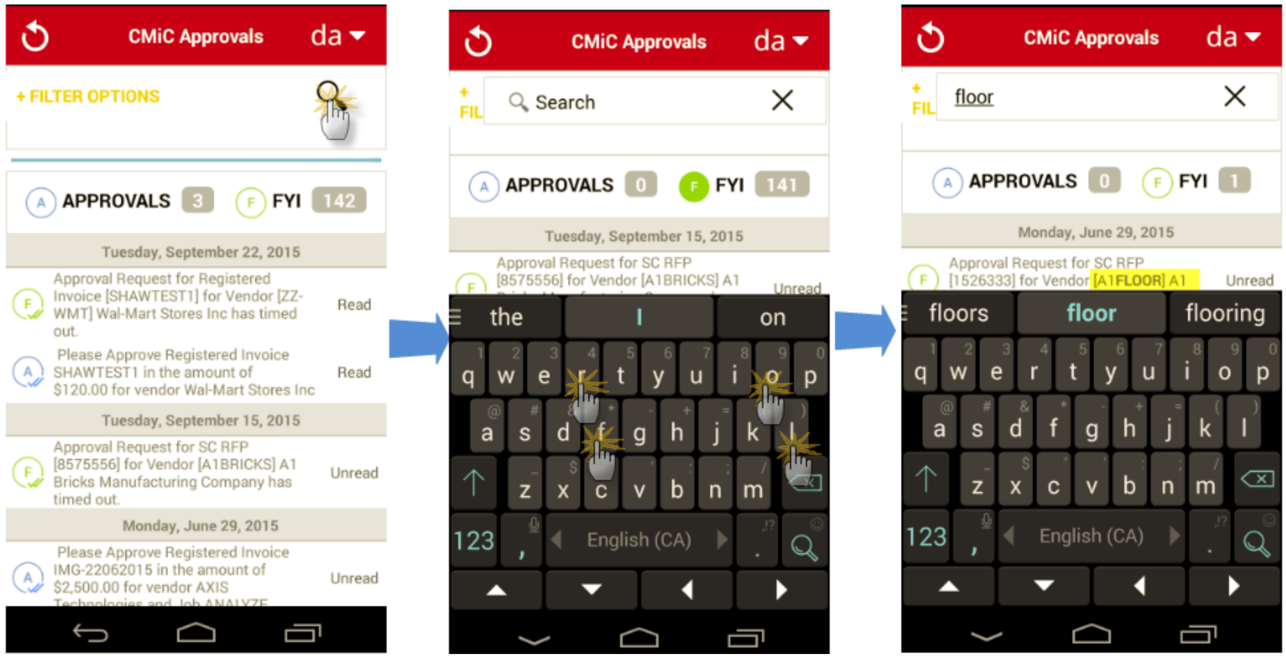
Display FYI Messages



Filter List by Date Range

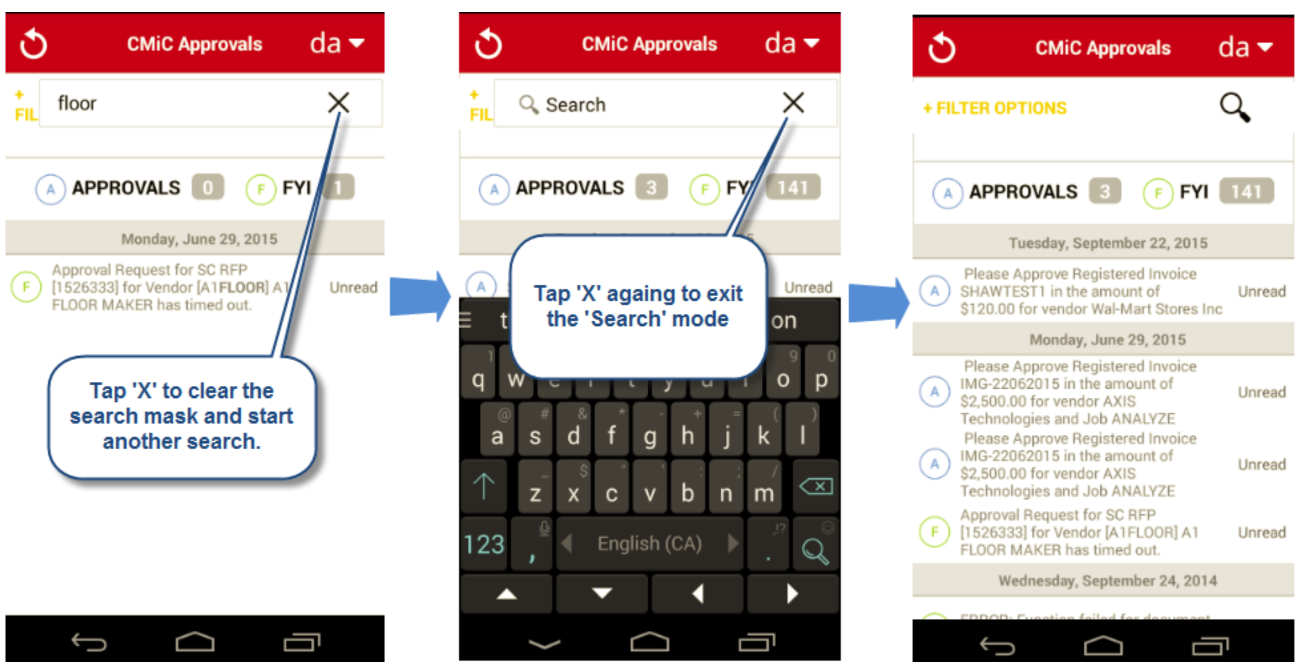


Searches



To search for an item, tap the Magnifying Glass icon and enter the search text. Matched records will be displayed while typing.

To clear the search text, tap the 'X' next to the search line. To exit the search mode, tap the 'X' when there is no search text entered (Search is displayed):



Refresh, Drop-Down Menu & Indicators

Refresh

Updates the notification list from the server.

da Drop-Down Menu

Available Offline

If on, notifications and their details, not just their subject lines, are saved to the device so that they are accessible when there is no connection to the server. As shown above, indicators show if the information for an item is accessible when working offline:

No checkmarks – only subject of the notification is downloaded.

Double checkmarks – the detail information of this notification is available offline.

Clear Data

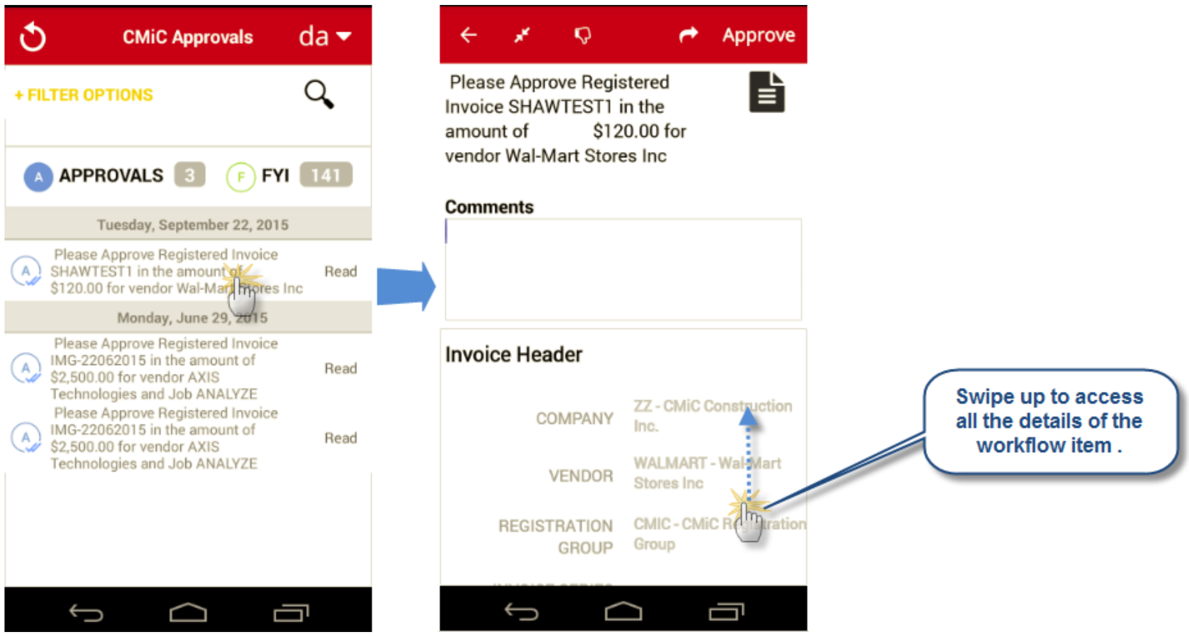
Deletes all the local data for this user. Tap the Refresh icon to load the notification list.

Log Out

Exits the application.

Working with Notifications

Approvals



Tap a request to access the details screen, which consists of three sections: a section of controls (along top of the screen), a section for the message, **Comments** and an icon to access the files attached to the workflow, and the workflow information in the lower part of the screen.

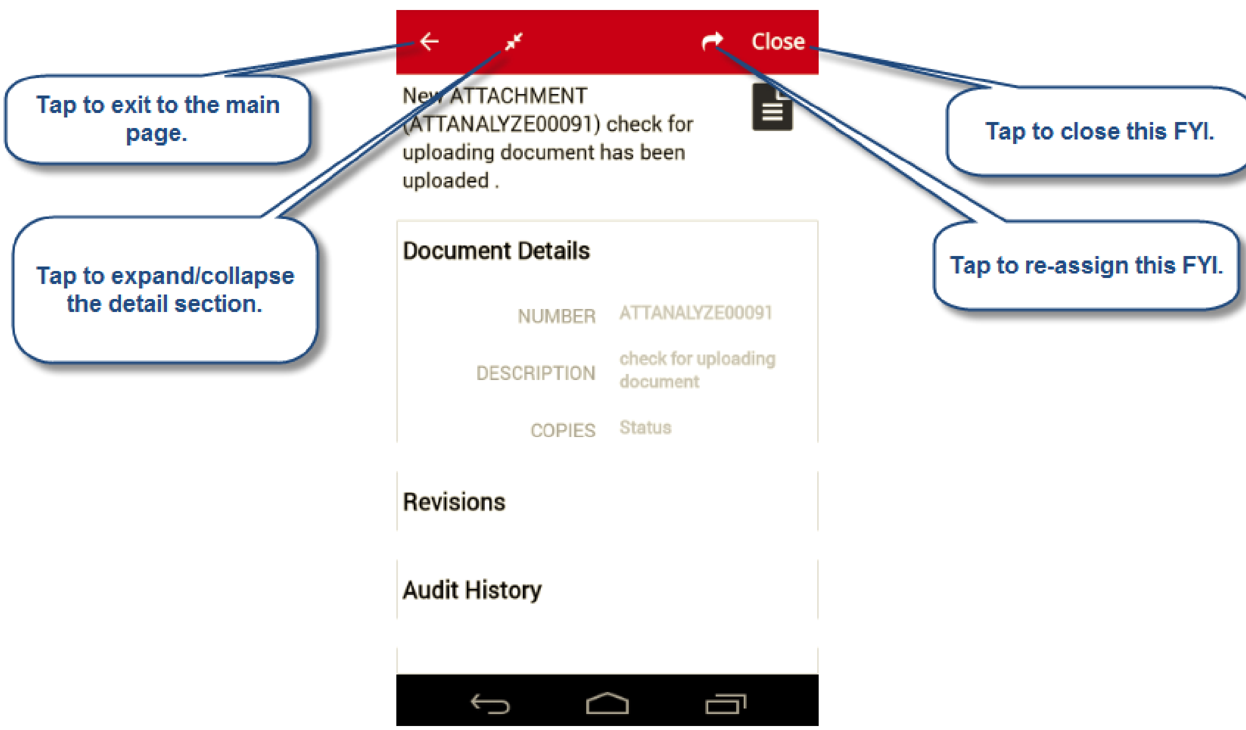
Working with Notifications

Depending on the settings in the Imaging Controls/Workflow Notifications and Display options, a **Comment** may need to be entered when approving/rejecting the workflow.

Upon tapping [Re-Assign], shown below, the application opens the screen where the workflow can be re-assigned to another user:

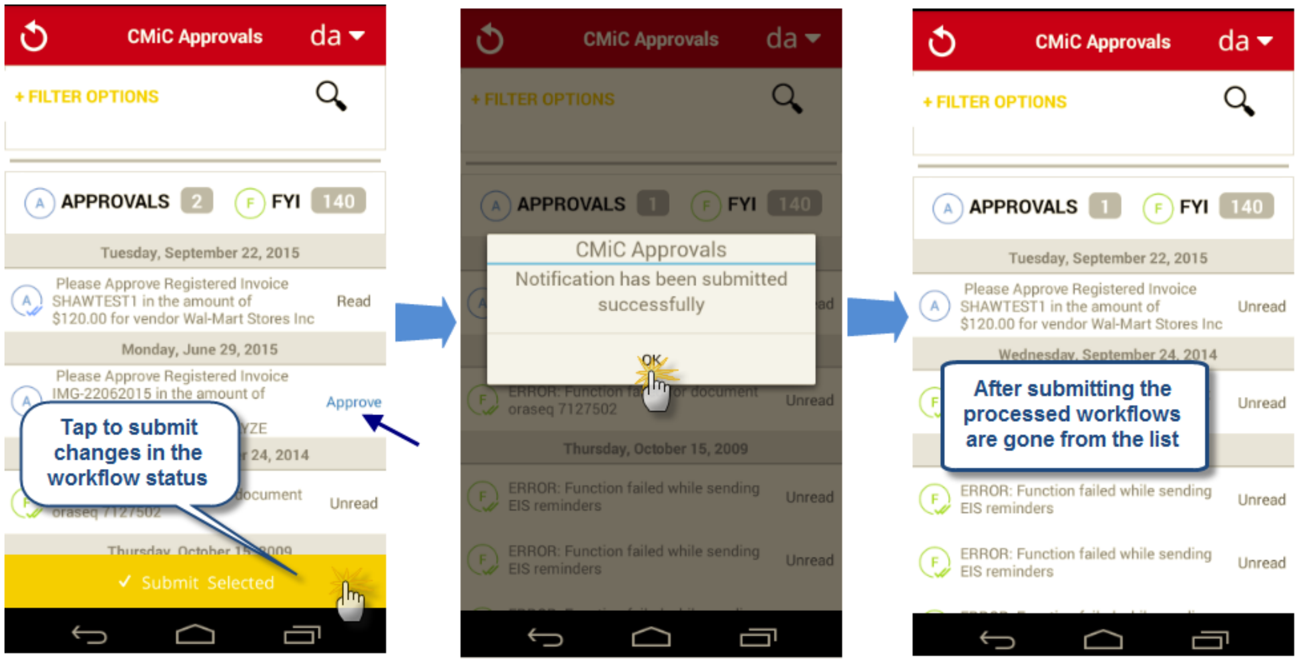
When the workflow gets approved, rejected or re-assigned the application returns to the main screen. The status of the workflow will be changed accordingly and displayed in the status column:

FYI Messages



The controls available on the FYI details screen are similar to the ones for Approvals, except there are no Approval/Rejection buttons. The only difference is the [**Close**] button, which is used to close the screen.

Submitting Changes



To submit the changes, tap the [**Submit Selected**] button. The approved, rejected and re-assigned notifications will be processed and removed from the list.

When submitting changes offline, the application creates a queue of the notifications with changed statuses, and once a connection to the server is restored, they will be submitted to and processed by the system.

PM Role Privilege - Disallow Creating Contacts For Company

This enhancement includes a PM Role privilege in the MAINTENANCE section of the PM Role Privileges screen: "**Disallow User From Creating Contacts For Company**".

When checked, this privilege **prevents** the user from **creating** new contacts for a Company (C-Type partner). The user can only **add existing contacts** for a Company by selecting them from the contact LOV.

If the user tries to **create** new C-Type contacts with this privilege assigned to his PM Role, a message will be displayed, and the user will be required to **select** a contact from the Contact LOV instead.

On selection of the contact code, it will back-fill the company/partner of the selected contact code (i.e. act as if the company code was not entered and left blank).

Also added the following columns to the Contact LOV:

Abbrev

Company Code

Company Name

Type

Index

A

C

D

E

F

H

I

L

M

O

P

R

S

U

W