**User Reference** 

# **Getting Started v10x**

By CMiC



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# Contents

GETTING STARTED	1
OVERVIEW – GETTING STARTED	1
CMIC SOFTWARE ENVIRONMENT	1
Development Tools.	
Software V10	2
Login	3
ENTERPRISE CONSOLE	4
	1
ADE Forms & ISP Screens	+4 ۲
ADT, FOIMS & JSI Screens	0 8
UI Console	8 8
BI Dashboard Builder	
BI Dashoodra Bailder RI Catalog Ruilder	
Treeview Builder	
Lite Editor	
Log Builder	
Process Builder	
ADF SCREENS	
0	20
SCREEN LAYOUT	
Console Regions: Treeview & Dynamic Content	
100LBARS & BLOCKS	
Main Toolbar Options	
DIOCK TOOLOUT OPHONS	23
SCREEN MODES TARLE & FORM MODES	
Table Mode	
Form Mode	
SEARCHES TARI E FILTERS & SORTS	30
<i>Query by Example</i>	
Search.	
Sorting Displayed Records	
Advanced Searches	
Wildcards – Pattern Matching	
Advanced Search Mode	
CMIC LOGS & QUERIES	
CMiC Logs	
CMiC Queries	
Reports	
Printing Reports	
Reporting	
Help	40
FORMS SCREENS	43

Screen Layout	
Console Regions: Treeview & Dynamic Content	
Main Application - Menu Bar	
Sub-Application - Toolbar, Blocks & Status Bar	
TOOLBARS	
Menu Bar Options	
Toolbar Options	
TABS AND DATA FIELDS	
Tabs	
Data Fields – Types	
Navigation	
SCREEN MODES: INSERT & QUERY (DATA QUERY)	
Insert Mode	51
Query Mode (Data Query)	51
TABLE SORTING	
Advanced Searches	
Wildcards – Pattern Matching	
Query Mode	
Reports	
Printing Reports	
Reporting	
Help	61
ISP SCREENS	64
Overview – JSP	64
JSP Security	64
Reports	
Printing Reports	
Reporting	
INDEX	69

# **Getting Started**

# **Overview – Getting Started**

This Getting Started guide provides a general overview of CMiC Enterprise, specifically, Enterprise Console and running screens in ADF, Forms and JSP. It provides an overview of CMiC Enterprise's environment, navigation, and the functionality that is common to its screens.

# **CMiC Software Environment**

CMiC Enterprise is a web-based software package, meaning that it runs through an internet browser. As with all web-based software, the type of web browser and the version of the web browser is relevant to its smooth operation. Currently, Enterprise operates through Internet Explorer 11, and the latest versions of Firefox and Chrome.

The following screenshot is a sample of a screen used to launch Enterprise.



Sample screen allowing user to choose a version of Enterprise, and its software environment (database system)

### **Development Tools**

The left-hand section of the screen, **DEVELOPMENT TOOLS**, in the screenshot above, provides tools for customizing Enterprise software to suit your specific needs. For example, there are tools to build custom treeviews, queries, processes, dashboards, etc.

There are two lists of options available: **Tool**, and **Environment**. The first list is for selecting the development tool to run. Several of these tools are described in more detail under the "<u>Customizing</u> <u>Enterprise Console</u>" section in this guide. The second list is for choosing in which environment you want to operate the tool.

Once you have selected the two options, press the [**RUN DevTools**] button, underneath the **Choose An Environment** list, as shown in the above screenshot.

### Software V10

Under the right-hand section of the screen, **SOFTWARE V10**, in the screenshot above, there are two lists of options available: **Product**, and **Environment**.

The first list is for selecting the CMiC product to run, and its options depend on the products purchased by your company. The product covered in this manual is **Enterprise Console**. **Enterprise Console** launches screens in ADF, Forms and JSP.

The second list, the Environment list, is for choosing which environment you want Enterprise to operate in. There are at least two environments (i.e. two distinct databases) in which Enterprise can operate, for instance, PROD and TEST. One or more environments would be used for actual company operations, and others would be used for testing and training purposes. Once you have selected the two options, press the [**RUN Software**] button, underneath the **Choose An Environment** list, as shown in the above screenshot.

### Login

ORACLE <sup>®</sup> Identity Management		
Sign In		OK Cancel
Enter your Single Sign-On user name and password to sign in	in.	
U	User Name Password	
		OK Cancel
Unauthorized use of this site is prohibited and may subject you to civil and criminal prosec Copyright © 1999, 2008 Oracle. All rights reserved.	cution.	

Sample Login Screen

Above is the Single Sign-On Login screen. Enter your user name and password (password is case sensitive), and click [**OK**].

Depending on the product selected to run, the system will then display the corresponding CMiC product.

# **Enterprise Console**

# **Overview**



Sample of a customized UI Console, with a tab for CMiC Enterprise displayed



Sample of a customized UI Console, displaying a tab for Human Capital Management related news

Enterprise Console functions like a customizable window into the CMiC Enterprise system, or into any other system that may be reached via an internet or intranet address. Customized Consoles are designed to facilitate a user's tasks in Enterprise by providing menus and applications relevant to them, and to facilitate making informed business decisions by providing information relevant to their particular needs. To

achieve this, Consoles contain tabs, and the tabs contain customizable regions, such as a Menu region to launch Enterprise applications and a Dynamic region to display the launched applications. Additionally, regions can display items like a company's intranet home page, an RSS feed, or an internet site.

As an example, to further illustrate the potential of a customized Console, one tab could be customized to facilitate a user's PM related tasks, a second tab could facilitate a user's tasks related to PM Reports, a third tab could display the company's intranet home page, and a fourth tab could display web feeds.



Sample of a tab displaying some KPIs

To further aid the making of informed business decisions, Enterprise Console also includes intuitive Dashboard and Log Building solutions (BI Dashboard Builder and Log Builder) that are second to none in helping users bridge the gap between data and usable information in a manner that is flexible and accurate. BI Catalog Builder is also used in conjunction with BI Dashboard Builder to create a catalog of Data Sources used in the design process. Specifically, Enterprise Console can be configured to display customized logs of crucial information, and display Key Performance Indicators (KPIs) via dials, graphs (CMiC Analytics), alerts, and dashboards.

To simplify routine processes, Process Builder can be used to turn a multi-step process into a simplified process train linking a series of screens, so users will never miss a step.

Take advantage of Treeview Builder and Lite Editor solutions to further fine-tune your console. Treeview Builder allows you to customize the Treeview menu used to list and launch the applications of Enterprise, external URLs, and created UI Logs and Dashboards. The Lite Editor can be used to create customized versions of screens for specific users and UIC Groups. For example, you can customize existing fields, table columns or tabs, add a new field, or set a screen's initial display mode.

The combination of tools provided in this advanced toolset will help users tailor the Enterprise Console to meet their unique and individual business needs. Each of these innovative, cutting-edge tools is discussed in more detail in the "Customizing Enterprise Console" section in this guide.

## ADF, Forms & JSP Screens

ADF, Forms and JSP screens can all be launched from the Enterprise Console using the console tabs. JSP screens can also be launched from ADF and Forms Treeviews.

The screenshots below show examples of each of the screens being displayed in Enterprise Console.

	MISTY	Select tab to c	lisplay ADF screens.	Active tab is high	lighted in white.			••
ENTERPRISE V10X ENTERPRISE V	10 WKF R	ESOURCE PLANNER   TEST	РМ   ОМ-JSP   E	dit Mode		0.0//9/9/		
0	ACCOUNT S	TRUCTURE	ADF sc	reen			💾 Save 🌗 Exit	⑦ ⑦ ▲ ▷ ▽ ○
General Ledger     Setup     Setu User Defaults     Company Setup     Maintain Accounts     Maintain Budgets     Local Tables     Global Tables	SELECTION CRITER * Chart of ACCOUNT TYPE	Accounts CCCHART X A CCCS-C	Emic Chart Code					
Chart Codes Account Structure Period Dates	View - Y	Freeze The Detach Detach Search	<ul> <li>Insert Insert Multip</li> <li>* Base Account Type Code</li> </ul>	e 🖅 Delete 🥸 Work	cflows 🔻 🖨 Report Opt	Clear	Second Documents	상 전 전 진 User Extensions
Business Units Consolidation Codes Octailed Consolidations Account Access Groups Journal Names B Transaction Allocation B Period End El Logs	A L O R E X	Assets Liabilities Equity Revenues Expenses Conversion Accounts	Assets V Liabilities V Owners Equity V Revenue V Expenses V Assets V	Perform         Perform           1         1000         2           2         2000         2           3         3000         2           4         4000         2           6         9000         2	Image: Normal System         NA         NA           1999         D         NA         A           2999         C         NA         A           3999         C         NA         A           4999         C         NA         A           8999         D         NA         A           9999         D         NA         A			
Query  Reports	TAC Update TA	c						

Example of ADF screen launched from console tab in Enterprise Console

CMiC Logged in as - MISTY	S	elect tab to display Fo	ms screens	. Acti	ive tab is	highlighte	d in	whit	e.	
ENTERPRISE V10X ENTERPRISE V10 WKF	RESOURCE	PLANNER   TEST   PM	OM-JSP	Ed	lit Mode					
C 0	Action E	dit Block Eield Record G 그 📭 Ma 🐨 端 🗞 🖄	uery Utility H	lelp ⊻ s≪c I	Vindow	. <b>+</b> 4		L		72BB/08
General Ledger				a anna a h-f				•		
□ Setup	Genera	ailedger-TESTVIU_X .	ACCOUNT STRUCT	ure w	aintenance					
Set User Defaults (F)	Chart Co	de	Forms s	cree	n					
Maintain Accounts (F)	Charteo									Jser Extensions <u>+</u>
		Chart Code CCCHART	CCS - Cmic	Chart	Code					User Extension1
Control (F)		-								User Extension2
Business Unit (F) (F) indicates	Account	Type							01	User Extension3
Chart Codes (F) Forms screens	Account			_	Low Acc	High Acc	Bal	VVm	Clear	User Extension4
Consolidation Codes (F)	Type	Name		Seq	Sequence	Sequence	Тр	eCode	iriag	Liser Extension5
Period Dates (F)		Assets				1999		INA	는 귀.	Upper Extension®
Maintain Companies (F)	L	Liabilities		2	2000	2999		NA		USEF EXTENSION
Account Structure (F)	0	Equity		3	3000	3999		NA		User Extension/
Journal Names (F)	R	Revenues		4	4000	4999	C	NA		More Extensions
Account Access Groups (F)	E	Expenses		5	5000	8999	D	NA		
Detailed Consolidations (F)	X	Conversion Accounts		6	9000	9999	D	NA		elated Screens +
Account by Department (F)										Poloted Coreen 4
Company Groups (F)					1	1		1		Related Screen I
Cost Pool Allocations (F)				1-				i—	ir I	Related Screen 2
Transaction Allocation				1-		1		i—	ie II	Related Screen 3
				╎──		-	╧	1-	ie II	Related Screen 4
Period End				╎──			╞		i- I	Related Screen 5
Document		<u> </u>		╟──		_			÷.	Related Screen 6
Queries				_	<u> </u>		_	<u> </u>		Related Screen 7
H Reports									<u> </u>	More Related
Utilities     Accounts Bruchlo								TAC	1	word ricialeu
Accounts Payable     Accounts Receivable	1							1710		
E Fixed Assets	Enter The A	ccount Type Code.								
Job Costing	Record: 1/6			<osc></osc>	•					

Example of Forms screen launched from console tab in Enterprise Console

JSP screens can be launched from the Enterprise Console tabs or from ADF and Forms Treeviews, as shown in the screenshots below.



Example of JSP module launched from console tab in Enterprise Console

Logged in as - MISTY Select tab to d	isplay Forms screens. Active tab is highlighted in white.
ENTERPRISE V10X ENTERPRISE V10 WKF RESOURCE PLAN	NER TEST PM OM-JSP Edit Mode
0	Forms screen
Equipment Costing	
Preventive Maintenance	
Materials Management	
E Payroll	
E Human Resources	
Personnel	
Benefit Administration	
Applicants	
Training/Certification	
Medical	
E Reports	This is a JSP module in a Forms Treeview. Clicking on this link
🗄 Utilities	will open the JSP module in a new Windows tab.
Copy Irades to Positions (F)	
Processing Eligibility (F) Repetit and Deduction Export (F)	
Year-End Lindate (E)	
Plans Conversion From Payroll To Herman Capital (F)	
Human Capital Management Employee Console	
E-Time	

Example of JSP module listed in Forms Treeview

CMiC Logg	ged in as - MISTY Sele	ct tab to display ADF screens. Active tab is highligh	ted in white.
ENTERPRISE V10X	RPRISE V10 WKF RESOURCE PLANNER	TEST PM OM-JSP Edit Mode	
°	O y SysCalendar	JSP screen	Outlook Import/Export Add Action Item Edit Preferences 🏼 📝
General Ledger     Accounts Payable     Accounts Receivable     Job Costing	Daily Calendar	012418 👸 Go	^
Subcontract Management     Change Management     Job Billing	<	Wednesday January 24, 2018	Add
Work Order Billing Requisitions	All Day 12:00am 01:00am		
Equipment Costing	02:00am 03:00am 04:00am		
Preventive Maintenance     Material Sales     Fixed Assets	05:00am 06:00am		
US Payroll     International Payroll     Human Resources	07:00am 08:00am 09:00am 10:00am	This is a JSP module in an ADF Treeview. Clicking links will open JSP screens in the ADF Dynamic	on these Region.
<ul> <li>Opportunity Management</li> <li>Calendar</li> <li>Outlook Import Export</li> </ul>	11:00am 12:00pm 01:00pp		
Organizations Opportunities Contacts	03:00pm 04:00pm 04:00pm		
My Action Items Projects Proposal Workspace	05:00pm 06:00pm 07:00pm		
Proposal Maintenance Opportunity Forecasting Setup	08:00pm 09:00pm 10:00pm		v

Example of JSP screen launched from ADF Treeview

# **Customizing Enterprise Console**

The following tools are used to customize your Enterprise Console.

## **UI Console**



After privileges to UI Console are granted, the [**Edit Mode**] button used to launch UI Console tool becomes available to the user, as shown in the screenshot above. Clicking on the [**Edit Mode**] button launches a screen where a new customized console can be created.



Sample display of Enterprise Console in Edit Mode: regions are split, and their content is defined

A new tab is created for each new customized console. Each tab is composed of different regions that can contain a variety of content. A new region can be added by splitting a single region into two regions using a region's **Edit Region** drop-down menu. A region's content can be selected and defined using a region's **Region Content** drop-down menu.

In the screenshot above, the console's Dynamic Display Region is one region, and Menu/Treeview Region is split into two regions. The content of each region is user defined.

CMiC Logged in a	ns - MIKEFER1	:	
ADF   FORMS   RESOURCE PL	ANNER   OM JSP   XPROJECTS	HCM INTRANET JB DASHBOARD	ADF - HISTORY Edit Mode
C 0		Clicking on tab opens customized disp	ay 💾 Save 🕞 Exit (j) ⑦ ⚠ 🛛 マ 🔾
General Ledger REGION 1	SELECTION CRITERIA	REGION 3 Dynamic Region (Region 3) application selected in Menu	displays (Region 1)
Company Setup Maintain Accounts	Company ZZ A CMiC Co	onstruction Inc.	List Accounts of
Local Tables Control File Options		111	,
Maintain Companies — Maintain Departments Department Dick Lift	View - Y 🖪 Freeze 🖷 Detach	👩 Search 🛛 Insert 👩 Insert Multiple 🛞	Workflows 🛛 👻 🔒 Report Options 🖌 🗮 Export 👋
Account Pick List	* Pick List Code	Description	* Dynamic
Cost Pool Allocations	PICK2	Pick List2	
Transactions     Period End     Menu Type	Selection Criteria Delete Pick List	1	
E Logs selected     Was v10x	FIXED ENTITY LIST		
History REGION 2	View 🔻 🍸 🌇 Freeze 🖷 Detach	👼 Search 🛛 🖶 Insert 📲 Insert Multiple 👼	Delete 💩 Workflows 🖛 🖶 Report Options 🖛 🏾 🎽
Setup   Set User Defaults	* Code	Description	
Setup   Maintain Accounts	1500.100	Current Receivables	
Setup   Maintain Budgets	1000.200	Bank of America (Payroll)	
Setup   Local Tables   Maintain Companies	1500.300	Interest Receivable	
Setup   Company Set       History lists         Setup   Set User Defa       screens the user         Setup   Local Tables       has visited	Populate by selection criteria		

Sample of a customized console

The above screenshot shows a sample of a customized console.

For instructions on customizing the Enterprise Console, please refer to the UI Console Tool Reference Guide.



# **BI Dashboard Builder**

Sample of a Dashboard in BI Dashboard Builder

BI Dashboard Builder is launched from CMiC Enterprise's launch page. It is listed in the **Development Tools** section. Users need to select **Dashboard Builder** under 'Choose A Tool', choose an environment under 'Choose An Environment,' and then click on the [**RUN Dev Tools**] button.

BI Dashboard Builder is a powerful business intelligence tool for building custom dashboards with interactive charts, gauges, and tables that use real-time data directly from your CMiC system to:

• consolidate and visualize large amounts of data from departments to provide high-level overviews that display current statuses and reveal insights and trends

- provide operational metrics and KPIs to monitor and track performance and progress, and to measure the impact of activities and investments
- provide real time monitoring of any data in your CMiC system
- help make informed and effective decisions

Since these dashboards use data directly from your CMiC system and are native to it (i.e., use same data formats), no data synchronization is required between the dashboards and your system, as would be for third-party BI dashboards, which means better performance and reliable up-to-date data. Furthermore, links to created dashboards can be added to Treeviews using our <u>Treeview Builder</u> tool, or to new Enterprise Console tabs using our UI Console tool.

For more information, please refer to the BI Dashboard Builder Reference Guide.

### **BI Catalog Builder**

		Create Dat Source	a Edit Data Source	Modify Folder Joins
Create Data So	ource			
Data Source Name:				
	Select Tables/Views:			
	Owner: DA Query Available Tables/Views	Filter: %JC	#%	
	Available:		Selected:	
	DA.JC#TIMESHEETPOSTDATES	*	DA.JC#JOBCATBILLCODE	
	DA.JC#TPHS		DA.JC#JOB	
	DA.JC#TRANH			
	DA.JC#TRNDET			
	DAJC#TRNDETT			
	DA IC#LITRAN			
	DA.JC#WBS			
	DA.JC#WIN_LOSE_BID			
	DA.JC#CTRL			
	DA.JC#CONTF_BILL_CHANGE_ORE	DERS		
	DA.JC#CONTFORECASTSTAFF			
	DA.JC#DETAIL	=		
	DA LOWTDAND			

Sample of BI Catalog Builder - ADF Tool

BI Catalog Builder is launched from CMiC Enterprise's launch page. It is listed in the **Development Tools** section. Users need to select **Catalog Builder** under 'Choose A Tool', choose an environment under 'Choose An Environment,' and then click on the [**RUN Dev Tools**] button.

BI Catalog Builder, shown above, works in conjunction with BI Dashboard Builder to create custom, dynamic dashboards, as shown in the <u>BI Dashboard Builder</u> section. BI Catalog Builder is used to create a catalog of Data Sources, and the BI Dashboard Builder tool uses these Data Sources to create custom dashboards that provide high-level overviews, operational metrics and KPIs.

For more information, please refer to the BI Catalog Builder Reference Guide.

### **Treeview Builder**

Treeview Builder is launched from CMiC Enterprise's launch page. It is listed in the **Development Tools** section. Users need to select **Treeview Builder** under 'Choose A Tool', choose an environment under 'Choose An Environment,' and then click on the [**RUN Dev Tools**] button.

Treeview Builder allows an administrator to customize the Treeview menu used to list and launch the applications of Enterprise, external URLs, and created UI Logs and Dashboards. Also, it allows Treeviews to be saved at either the User, Group, or Site Level, so that Treeviews can be customized for just one user, a group of users, or for all Enterprise users. Its functionality is similar to that of the JSP Menu Maintenance tool for JSP based applications.

The following sections provide examples of configuring treeview menus. These new treeview menus can be easily added to Enterprise Console.

For more information, please refer to the UI Treeview Builder Reference Guide.

### Adding a New Menu Item



Example of adding a new menu item to Treeview

To add a new menu item to the Treeview being configured, left-click the node to contain the new menu item to bring up the context menu and select **Add New**. A new menu item will be added to the selected node, as shown in the above-right screenshot.

### Linking Menu Item to External URL

[	CURRENT MENU ZA -MENU FOR TEST - TEST FOR ZOHREH	ලි Search	ITEM PROPERTIES				
I	TEST FOR ZOHREH     General Ledger	-	System				
	<ul><li></li></ul>		Label E	External URL			
I	<ul> <li>              € Period End      </li> <li>             Query         </li> </ul>		Icon Type (	) Menu () Icon			
	Report     Jasper Reports     Itilities	*	Target Type	External URL	-		
	Copy Account Copy Dept/Account Security		Target Name				
	Foreign Batch Import Recalculate Balances	Search and Select: Targe	tName			×	
	Balance Table Verification Delete Batches Inter Departmental Clearing	Search Match  All  Any				Advanced	Edit
	Reverse/Recreate Posted Transa Update Transaction Tax, Values	App Code					
l	Print Posting Reports External URL	Target Name Customization Level					
1	<ul> <li></li></ul>					Search Reset	
	<ul> <li>Job Costing</li> <li>Subcontract Management</li> </ul>	App Code Ta	arget Name		Customization Le	vel	
	🗄 Change Management	AF	P Executive Query		CLIENT		
	⊡ Job Billing	Ð	(TERNAL URL		UIC		
	Work Order Billing     Requisitions	PN	4 - Communications Det	ail	STANDARD		
	Requisitions     Purchase Order	SY	/S - Customer Support		STANDARD		
	Inventory	SY	rS - xProjects Dashboar	D	STANDARD		
	Equipment Costing     ■	go	oogie		UIC		
	Dreventive Maintenance	po	17-2		UIC		



Sample of an External URL opened through a configured Treeview's menu item.

## Lite Editor

ORGANIZATION	MANAGEMENT	Та	ble Mode 💾 Save 🍺 Exit 🤇	∂ @ ∆ [/ -
ORGANIZATION	Lite Editor Remove Program Customizations Fields Tabs Table Mode	Editing Leve	I USER MIKEFER1	× eries Inc.
Detail Opportu	Block OMORGDETAIL Field Pa Table Name OM#ORGANIZATION Column Name OMO_PARENT_NAME Field Widget InputText	arent Name	Advanced	, 
Contr AKA Organiz	Row Prompt Controlling Parent Column Title Controlling Parent Visible Disabled Width 50 Height 1 Display Order 45 Single Row -Rows Per Table Default 20 Custom	New Row Free-Form Row Link with Previous Field Column Span Tooltip Default Value Required		Client rce Repeat Clien ass Retailer ion D99 tity
COMPANY TYPES	Move Tab Name Detail Position () After () Before Position Field	Remove Field Custor	nizations Add Field Undo Save	SN  icy  t Export  *
Client		<b>A</b>		

CMiC's Lite Editor is used to create customized versions of screens for specific users and UIC Groups. Via the editor, various properties of a screen's fields and tabs can be modified, new tabs and fields can be added to the screen, and the screen's startup mode (Table Mode or Form Mode) can be altered.

### Launching Lite Editor for Customizations

Table Mode Save Exit	ⓒ ⑦ ▲ 🔽 🤜 Site DA	70
	Group OMADMIN	<u>^</u>
cflows 🛛 👻 🔒 Report Options 🛛 👻 🖉 Attachments (8) 📄 Notes (3) 🔗 ECM Documents	User MIKEFER1	

Step 1: Load Screen at Level to Customize Screen

The first step in launching the Lite Editor to customize a screen is to load the screen at the level you wish to customize it.

This is done by clicking the down-arrow on the Lite Editor icon 22, which causes a list of the customizable versions of the screen available to you to be displayed (as shown in above screenshot). Via the list, select the desired version. The blue dot indicates which version of the screen is displayed.

ORGANIZATION MANA	GEMENT			Table Mode Save	
Controlling Marcket Sector Name					
ORGANIZATION					
👩 Search 🛛 🖶 Insert 👼 Dele	te 👍 Previous 🌩 Next 🏽 🇞 Wo	orkflows 🛛 👻 🔒 Report Options 🛛 👻 🖉 Attach	ments (4) 🗐 Notes (1	1) 🚱 ECM Documents 🛛 👻 🖧	User Extensions
Organization	Name: Twain Alliance - Mas	sachusetts	Legal Name		/
Detail Opportunities Cla	assification Addresses Conta	acts Action Items Notes Attachmen	click any	Edit icon to launch Lite mize screen's tabs	Editor to:
Controlling Parent	]	A	Z. set so	creen's initial display mo	ode: Table or Form Mode
AKA Organization Name:	1	/			
Street:	92 Salamander Lane	/ Suite:	Previous Client	Current Client	
City:	l	/ State/Prov: MA	lassachusetts		
Country:	USA	Zip/Postal Code:		Source	A 🧷
Phone #1:		Customer		Class Electrical Items	<u> </u>
Phone #2:	1	Vendor 🗸		Registration 22222	/
Phone#3:		Organization (Only)		1099 1099 Other	· /
Fax:		/ Top X Account		Legal Entity	· /
Web Site:	]	Active Flag		SSN 📃	
Email:		National Account		Ethics Policy	
courses click a fie	eld's Edit icon to launch Lif	te Editor to edit it, or to add new fie	ld to its section	(block)	
			1 -		
View 🔻 🍸 🌇 Freeze 🖀	Detach 🔯 Search 🖶 Insert	Insert Multiple 🚓 Delete 🛞 Workflows	🛛 🖛 Report Optic	ons 🛛 🔻 🌇 Export 🛛 🖓 ECM Doc	cuments   국 Kan User Extensions
	Description		to make Edit	t icon visible for table's	columns.
No rows yet.		•	- insert new r	ow; at least 1 row is req	uried to
MARKET SECTORS			make Edit ic	on visible, as shown be	elow
View - The Freeze	Detach 👩 Search 👼 Insert	🗿 Insert Multiple 🛛 👼 Delete 🛛 🗞 Workflows	💌 🖨 Report Optic	ons 🛛 👻 🌉 Export 🛛 🔗 ECM Doc	cuments 🚽 🖧 User Extensions
• •• ••				i ma i str	1 00
Ctrl. Mark	let Sector	* Name			

Step 2: Switch Screen to Edit Mode & Click Relevant Edit Icon

Once the screen is loaded at the level it is to be customized, for the target user or UIC Group if at the User or Group Level, it can be switched to Edit Mode via the Lite Editor.

To switch the screen to Edit Mode, as shown above, click the Lite Editor icon  $\square$ . Then, to launch the Lite Editor, click the relevant Edit icon  $\checkmark$ . Below are details about how to click the relevant Edit icon:

#### **Customize Existing Fields**

To customize an existing field, click the field's corresponding Edit icon.

#### Customize Table's Columns

To customize a table's column, click the column's corresponding Edit icon.

**NOTE**: The Edit icon will only be available if the table has at least 1 row. As shown in the above screenshot, if a table has no rows, click the table's **[Insert]** button to insert a row and make the Edit icon available.

#### Add New Field

New fields can only be added to sections with existing fields. They cannot be added to tables or any area in which there are no other fields.

To add a new field, click the field which will be before or after the new field.

#### Customize Tabs: Add New Tab

To customize or add new tabs, click any Edit icon.

#### Set Screen's Initial Display Mode: Table Mode or Form Mode

To set a screen's initial display mode, click any Edit icon.

For more information, please refer to the Lite Editor Reference Guide.

# Log Builder

LOG BUILDER															
Create Delete Remove Customizations Copy Search Save Run Screen Calls Standard Filters															
Log Code FASSETLOG							Where	lause							
* Description Fixed Asset Log															
* Application FA	<ul> <li>Fixed Assets</li> </ul>														
Timestamp Nov 02, 2015 at	04:19:19 pm Custom Log? 🗹	1													
COLUMNS				1	1			1	1						
Visi Column Name	DB Column Name	Display Order	Header	Header Alignmen	t Width	1	Alignment	Format Mask	Frozen	Wrap	Searchable	Total	Sort Order	Sort Direction Link	
FastAccDep	FAST_ACC_DEP	20	Accumulated Depredation	Center		20	Right		0		V			Ascendr	
FastActivDate	FAST_ACTIV_DATE	30	Activation Date	Center 💌		- 201									
						20	Left	DD-MOIN-RR	0		V			Ascendir	
✓ FastAdAccCode	FAST_AD_ACC_CODE	40	Ad Acc Code	Center	,	20	Left 💌	DD-MON-RR •	0		V V			Ascendir 💌	
FastAdAccCode      FastAdAccName	FAST_AD_ACC_CODE FAST_AD_ACC_NAME	40 50	Ad Acc Code Ad Acc Name	Center Center		20 20 20	Left 💌 Left Left	DD-MON-RR 💌	0		V			Ascendir Ascendir	
Image: PastAdAccCode       Image: PastAdAccName       Image: PastAdDeptCode	FAST_AD_ACC_CODE FAST_AD_ACC_NAME FAST_AD_DEPT_CODE	40 50 60	Ad Acc Code Ad Acc Name Accumulated Depreciation	Center Center Center		20 20 20 20	Left Left Left Left		0		V V V			Ascendir Ascendir Ascendir Ascendir	1
✓     FastAdAccCode       ✓     FastAdAccName       ✓     FastAdDeptCode       ✓     FastAdJCostBase	FAST_AD_ACC_CODE FAST_AD_ACC_NAME FAST_AD_DEPT_CODE FAST_AD_COST_BASE	40 50 60 70	Ad Acc Code Ad Acc Name Accumulated Depredation Adj Cost Base	Center Center Center Center		20 20 20 20 20	Left Left Left Right	DD-MON-RR 💌	0		V V V V			Ascendir Ascendir Ascendir Ascendir Ascendir	:
✓     FastAdAccCode       ✓     FastAdAccName       ✓     FastAdDeptCode       ✓     FastAdJcostBase       ✓     FastAreaWmCode	FAST_AD_ACC_CODE FAST_AD_ACC_NAME FAST_AD_DEPT_CODE FAST_ADJ_COST_BASE FAST_AREA_WM_CODE	40 50 60 70 80	Ad Acc Code Ad Acc Name Accumulated Depreciation Adj Cost Base Weight/Measure Code	Center Center Center Center Center Center		20 20 20 20 20 20	Left Left Left Right Left		0		V V V V			Ascendir Ascendir Ascendir Ascendir Ascendir Ascendir	
Image: wide of the state o	FAST_AD_ACC_CODE FAST_AD_ACC_NAME FAST_AD_DEPT_CODE FAST_AD_COST_BASE FAST_AREA_WM_CODE FAST_ASET_TYPE	40 50 60 70 80 90	Ad Acc Code Ad Acc Name Accumulated Depreciation Adj Cost Base Weight/Measure Code Type	Center Center Center Center Center Center Center		20 20 20 20 20 20 20	Left  Left Left Right Left Left Left Left Left Left Left							Ascendir Asc	
Image: set address of the set addr	FAST_AD_ACC_CODE FAST_AD_ACC_NAME FAST_AD_DEPT_CODE FAST_ADD_COST_BASE FAST_AREA_VIM_CODE FAST_ASSET_TYPE FAST_ASSET_TYPE FAST_ASSET_TYPE	40 50 60 70 80 90 100	Ad Acc Code Ad Acc Name Ad Acc Name Adj Cost Base Weight/Measure Code Type Assigned to	Center Center Center Center Center Center Center Center		20 20 20 20 20 20 20 20 20	Left Left Left Left Left Left Left Left Left							Ascendir Asc	

Sample of Log Builder screen

Log Builder is launched using the following Treeview path: System > Logs > Log Builder.

Log Builder is an Enterprise business intelligence tool that enables users to filter, organize and present a complex table's data in a manner that helps them make informed business decisions. In this way, customized Logs are similar to reports, and if required, their data can be exported to a spreadsheet.

Log Builder can be used to create a new log or edit an existing log. One way that users can customize their log is by editing column definitions.

LOG BUILDER													
Create Delete Remov	ve Customizations Copy Search	Save Run Screen Calls Standam	d Filters										
Los Code ACCOUNT LOG1				Whe	re Clause								
Description Accounts Log													
Application GL	General Ledger												
Timestamp Oct 06, 2015 at 11	:47:26 am Custom Log? Y Show I	Record Count? N											
LUMINS													
Visi Column Name	DB Column Name D	isplay Order Header	Header Alignment	Width	Algnment	Format Mask	Frozen	📰 Wrap	Searc	hi Total	Sort Order	Sort Direction	Link
AccConschartCode	ACC_CONSCHART_CODE	10 AccConschartCode	Center	20	Left		0					Ascending	
AccCode	ACC_CODE	20 AccCode	Center	20	Left		0		2			Ascending	
AccName	ACC_NAME	30 AccName	Center	20	Left		0		7			Ascending	
AccCounterAcc	ACC_COUNTER_ACC	40 AccCounterAcc	Center	20	Left		0					Ascending	
AccDistCode	ACC_DIST_CODE	50 AccDistCode	Center	20	Left		0					Ascending	
AccTypeCode	ACC_TYPE_CODE	60 AccTypeCode	Center	20	Left		0		<b>V</b>			Ascending	
AccSafCode	ACC_SAF_CODE	70 AccSafCode	Center	20	Left		0		V			Ascending	
AccCompressCode	ACC_COMPRESS_CODE	80 AccCompressCode	Center	20	Left		0		V			Ascending	
AccNormalBalCode	ACC_NORMAL_BAL_CODE	90 AccNormalBalCode	Center	20	Left		0		V			Ascending	
AccSequence	ACC_SEQUENCE	100 AccSequence	Center	20	Right		O		V			Ascending	
AccSubledgCode	ACC_SUBLEDG_CODE	110 AccSubledgCode	Center	20	Left		0		V			Ascending	
AccSummaryCode	ACC_SUMMARY_CODE	120 AccSummaryCode	Center	20	Left		0		7			Ascending	
AccWmCode	ACC_WM_CODE	130 AccWmCode	Center	20	Left		0		V			Ascending	
AccLongCode	ACC_LONG_CODE	140 AccLongCode	Center	20	Left		0	<b></b>				Ascending	
AccCtrlCode	ACC_CTRL_CODE	150 AccCtrlCode	Center	20	Left		0		V			Ascending	
AccLevelCode	ACC_LEVEL_CODE	160 AccLevelCode	Center	20	Right		۲					Ascending	
AccLowFlag	ACC_LOW_FLAG	170 AccLowFlag	Center	20	Left		0		V			Ascending	
AccMonetaryFlag	ACC_MONETARY_FLAG	180 AccMonetaryFlag	Center	20	Left		0					Ascending	
AccInterCompAccPlag	ACC_INTER_COMP_ACC_FLAG	190 AccInterCompAccFlag	Center	20	Left		0					Ascending	
AccOfConcatenatedSegm	er ACC_OF_CONCATENATED_SEGMENTS	200 AccOfConcatenatedSegments	Center	20	Left		0					Ascending	
AccHier	ACC_HIER	210 AccHier	Center	20	Left		۲		V			Ascending	
AccTavCode1	ACC_TAV_CODE1	220 AccTavCode1	Center	20	Left		0		7			Ascending	
AccTavCode2	ACC_TAV_CODE2	230 AccTavCode2	Center	20	Left		0					Ascending	
AccTavCode3	ACC_TAV_CODE3	240 AccTavCode3	Center	20	Left		0		V			Ascending	

Example of Log Builder screen showing column parameters

The Log Builder screen will display every column for the selected table, in rows, with parameters for each column that control how the Log displays them. Basically, a Log is defined (customized) by defining how each of its columns are displayed, such as setting their visibility, their header title, width, whether or not their values are hyperlinks, and the order of their values (ascending, or descending).

The following table provides descriptions of the parameters used to control a column's display by the log:

Field	Description
Visible	Specifies whether the column is visible in the Log.
Display Order	Order in which the column will be displayed by the Log.
Header	Column's header, as it is to be shown by the Log.
Header Alignment	Column header's alignment (left, center, or right).
Width	Maximum number of characters that can be displayed by the column.
Alignment	Alignment for the data displayed in the column (left, center, or right)
Format Mask	Only relevant to columns with numeric values; this mask is a character literal that describes how numeric values should be formatted.
Frozen	This radio button is used to determine which of the first columns, with respected to the order of their display, are to be fixed (always displayed) when the table is scrolled horizontally. Only one column can be selected. The result is that the first column up to the column with this radio button selected remain fixed, when the remaining columns are horizontally scrolled through.
Wrap	Indicates whether the column data can wrap to the next line.
Search	Indicates whether the column can be searched against or not; only columns with this check-box checked and that are visible are searched against when a user performs searches.
Total	Only relevant to columns with numeric values; if checked, the column will have a total of all of its values at the end of it.

Sort Order	For columns with numeric values, the entered value specifies the starting value from which the Log will begin displaying the column's values, in the order set by the Sort Direction field. For example, if a user would like to view Account Code column entries that start with a minimum value of 1000, and sorted by the direction specified by the Sort Direction field, enter 1000 for this parameter, for the Account Code column.
Sort Direction	Value that specifies how the column data should be sorted (ascending or descending)
Link	This field is used to specify an Enterprise application, using a Screen Call, to display information associated with the column's value. If an application is specified, this column's value, in the Log, becomes a hyperlink to launch the selected application to display its associated information.

Users can make custom logs accessible by adding them to Treeview using <u>Treeview Builder</u> or to the UI Console Region.

For more information on Log Builder, please refer to the Log Builder Reference Guide.

## **Process Builder**

Save Run							
Process Definition Crea	ate Delete Co	py Search					
Process Code AP_ADD_PAYMEN	TS_PROCESS						
Application AP							
Description AP - Process - Pro	cess Payments						
Process Steps     Create	Delete						
				10.1.0.1			
* Step Name	Target Type	* Target Name	Program/Report Nan	* Display Order	Step litte	Default Step?	
Prenare Checks	UIRuntime Progra	m AP - Select Payments	APCHOPRE	2		N	
Print Checks	UIRuntime Progra	m AP - Print Check	APCHQPRT	3	Print Checks	N	
Post	UIRuntime Progra	m AP - Post Check Run	APCHQPST	4		N	
4							4
Process Flows Create	Delete						
From Step Name	Te	Sten Name	To Step Ena	bled Condition		Condition Check When C	ode .
Post	Pr	int Checks	To step End	bica contaition		Contrador Criccic When C	
Post	Pr	epare Checks					
Post	Se	elect Payments					<b>•</b>
Prenare Checks	Pr	int Checks					× =
Prepare Checks	Se	elect Payments					
Prepare Checks	Pr	st					*
Print Checks	Se	elect Payments					
Print Checks	Po	ost					-
Print Checks	Pr	epare Checks					<b>•</b>
	s create Delet	le l				4	
From Step Name To	o Step Name	To Step Parameter N	lame Param	eter Order From S	tep Block Name	From Step Block Field Name	Parameter Default Value
Post Pr	rint Checks	p_comp_code	1	Criteria	3	CompCode	
Post P	rint Checks	p_grp_code	2	Criteri	3	SelCode	
Pi dati Pi	in checks	p_sel_code	5	Citteri		Jereoue	

Sample of Process Builder

ENTER VC	DUCHER			Table Mode	💾 Save 🛛	🕞 Exit	<i>i</i>	?∆	[≱∣≂ Q
	Enter Invoices	O Print Edit List Post Inv	oices	- Process					
SELECTION CRI	TERIA								
* Company Z	Z	CMiC Construction Inc.							
* Batch	35718 🔺	MIKEFER1 2016-07-29 V		Create Batch					

Sample of a Process, on Enter Voucher screen (VOUCHENT)

Process Builder is launched from CMiC Enterprise's launch page. It is listed in the **Development Tools** section. Users need to select **Process Builder** under 'Choose A Tool', choose an environment under 'Choose An Environment,' and then click on the **[RUN Dev Tools]** button.

CMiC's Process Builder is used to create a Process, which is comprised of a series of links to screens used to complete a particular process, such as the one required to enter, review, and post invoices.

Users also have the option to create a copy of an existing Process, including CMiC's standard Processes (provided with system). This is useful if you would like to create a customized version of a standard Process or of a user-defined Process, by adding steps to, or removing steps from the copy.

When finished, users can add new Processes to Treeview using Treeview Builder.

For more information, please refer to the Process Builder Reference Guide.

# **ADF Screens**

# **Screen Layout**

### **Console Regions: Treeview & Dynamic Content**

CMiC Logged in as - DA ENTERPRISE V10 ENTERPRISE V10X Edit M	
C 0	JC DEFAULT COMPANY
E General Ledger El Accounts Payable El Accounts Receivable El Job Costing El Setup	DEFAULT COMPANY Search 🖶 Insert Record 🗃 Delete Record 🏟 Previous Record 🔹 Next Record 🚳 Workflows 🛛 👻 🕀 Report Options 🖉 🥵 ECM Documents 🖉 🌾 User Extensions
Extreme Contract Selected Local Tables application Job Transactions Forecasting Logs Query Reports	User (DA     In Procession (Company)       ** Default Company     In Procession (Company)       job Security Group     In Procession (Configuration)       Default Executive Query Configuration     Colic Default Configuration       Default Procession (Configuration)     Colic Default Configuration       Default Procession (Configuration)     Colic Default Configuration
BU Utilities     Subcortract Management     Change Management     Dyb Billing     Metry Crider Billing     Metry Crider Billing     Metry Crider Conting     Preventory     Enquipment Costing     Preventive Maintenance     Material Sase     Metry Assets     Urs Payroll	Dynamic Content Region: displaying application chosen from Tree View

Sample display of Enterprise Console, showing selected application in Treeview Region (Path: Job Costing > Setup > Set User Defaults) and ADF application in Dynamic Content Region

Like other menus, the Treeview Region is used to launch the applications of Enterprise. The Treeview is structured using nodes, which have a '+' or '-' symbol. Each node represents a main application, or in other words, a module of Enterprise. The '+' symbol means that the node is expandable, to reveal other nodes or actual menu options for launching applications. If the node has a '-' symbol, it means it is collapsible, hiding any of its child nodes or menu options. The options given by the Treeview are dependent on a user's security rights, and it only shows applications for which the user has rights.

The system is delivered with some standard Treeview configurations to choose from, however, functionality is provided for creating customized Treeviews for all users, user groups, or specific users. For details about building Treeviews, please refer to the UI Treeview Builder Reference Guide.

# **Toolbars & Blocks**

WORKFLOW MAINTENANCE			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	💾 Save 🕞 Exit 👔 🕐	∆ ₽⊽O
SELECTION CRITERIA				1	
* Program ARINVFM	AR Invoice Entry			Main Too	olbar
* Block ARINVOICE	A Riock 1	Dies	k Teelhor		
Workflow Privileges	BIOCK	BIOC			
WORKFLOW PROCESSES			•		
View 🔻 🝸 🌇 Freeze 🖷 Detach	🔯 Search 🛛 🖶 Insert Record 🛛 🗿 Insert Multiple Records	🖶 Delete Record 🛛 🗞 Workflows 🛛 🖛	🔒 Report Options 🛛 🔻 🌉 Export	용 ECM Documents 🛛 👻 Kaser Extensio	ons
* Item Type	Item Description * Process Na	me Input Prefix	c Condition	Active	
CMARMON	CMiC AR Monitor (24-Jun-2) Block 2	<b>A</b>	Condition		
ATTRIBUTE MAPPING					
View 🔻 🍸 🌇 Freeze 🖀 Detach	🔯 Search 🛛 🖶 Insert Record 🏻 🎒 Insert Multiple Records	E Delete Record 🛛 🖓 Workflows 🖛	🔒 Report Options 🛛 🖛 🎚 Export	용 ECM Documents 🛛 👻 🖧 User Extensio	ons
* Attribute Name	* Source Type Source Name o	r Value Active	<b>•</b>	1	
APPROVER_1	Field Block 3 OICE_CArLessHit	dbk 🔺 🗸	Block T	oolbar	

Sample screenshot of an application with three blocks (sections) and the two main toolbar types used by Enterprise Console

**NOTE**: In CMiC reference guides, the terms "screen", "application" and "program" are used interchangeably, as are the terms "block" and "section".

The screens (applications) of Enterprise Console use two main toolbar types: **Main Toolbar** and **Block Toolbar**. The Main Toolbar handles the broad functionality of the screen, and the Block Toolbar handles block-specific functionality. The options available in these toolbars can vary.

### **Main Toolbar Options**

### **About – Current Application**



**About**, on the Menu Toolbar, displays information about the current application and the editing privileges of its current user. It also displays the name of a selected table or field. This function is particularly useful to retrieve information about the current application in case you need to communicate with CMiC about it.

About	×
Workspace Code	CMICSTANDARD
Application Code	JC
Program Name	JCJOBFM
Screen Name	Main
Block Name	CONTROL
Table Name	
Field Name	CompCode
Field Oraseq	309096
Column Name	
Last Modified	29-JUL-2015 18:56:46 -04:00
Program Pin Number	78
Custom Program Pin Number	1
Editing Privileges	Insert Update Delete
	Launch Originating Form Launch Standard Program

### Main Toolbar Icons

Main Toolbar							
lcon	Name	Usage	Function Key				
Add New	Add New	Add/Insert a new record.					
Table Mode	Table Mode	Switch from displaying a single record to displaying a table of records.					
E Save	Save	Save the record(s) in the current application.	Ctrl-S				
Exit	Exit	Exit the current application.	Ctrl-Q				
١	About	Displays information about the current application and the editing privileges of its current user.					
?	Help	Launches Help for the current application in a new browser window. Refer to the ADF <u>Help</u> section of this guide for further details.					
	Error Details	Displays details about any errors that may been encountered in the current application.					

Main Toolbar								
lcon	Name	Usage	Function Key					
₽⊲	Toggle Edit Mode	Used to customize the application's display for a user. After clicking this option, click any of the Pencil icons to bring up the customization screen. The screen will display up to 3 tabs: <b>Fields, Tabs</b> and <b>Table Mode</b> . You can then customize how the application displays its records, such as what fields or tabs to display, and whether you want the application to start in Table Mode or Form Mode. Note: Application must be in Form Mode to customize the tabs.						
0	Restart	Restarts the current application.						

### **Block Toolbar Options**

This section provides further details about the more involved options of the Block Toolbar.

### **Attachments and Notes**

С О	JOB SETUP	Screen in Form Mode:	Table Mode	💾 Save 🕞 Exit 🕡 🍞 🛆 🄀 🗢 🗘
General Ledger		Single Record		
Accounts Payable	SELECTION CRITERIA	Single Record		
Accounts Receivable			Attachments:	Notes: showing
Job Costing	Company ZZ	CMiC Construction Inc.	showing 1 file	2 notes attached
Setup			etteched to record	to record
🖃 Job	IOD DETAIL		allached to record	to record
Enter Project	JOB DETAIL			
Assign Project Contacts	lob Detail Settings Account	ts AP Taxes lob Billing WIP Payroll	Bank Security Equipment Locations Com	Diance
Enter Job			7 11	· 🖌 🕴 👘
Setup Job Pick List Block Toolbar-	🚽 🔊 Search 🛛 🖶 Insert Record 🚛	Delete Record 🛛 🔶 Previous Record 👘 Next Record	🗞 Workflows 🔻 🖨 Report Options 💌 🖉 Attac	hments (1) 🗐 Notes (2) 👋
Assign Cost Codes	-			
Assign Templates To Multiple Jobs	* Job	Code CENTRALSQR Central Square	•	
Enter Budget	* Contr	rol Job ALL All Bid Job	Bid Date Status Pend	ing
Assign Overhead Cost Rates				3
Start Job	Billing M	ethod Job Billing Contract CEP	VIRALSQR * Valid Y	
Add Categories To Jobs In Process	* Cust	tomer AXIS AXIS Technol	ogies Update Custo	omer
Win/Lose Bid	Deployt Mar		Contact Name	

Sample of a screen in Form Mode, displaying a record with associated attachments and notes

C O General Ledger O Accounts Payable Accounts Receivable	JOB SETUP	Screen in List of	Table Mode: Records	Attachn showing attached	nents: 1 file d to record	■ Save → Exit (2) ⑦ Δ 2/ マ Q
Job Costing     E Setup	View - Y 🛱 Freeze	Detach 🛛 🗖 Search 🖶 Insert Re	cord 🖽 Delete Record 🔞	Workflows 🔻 🖨 Report	Options 🔻 🌇 Export 🖉 Attachmer	nts (1) 🗏 Notes (2) 🖓 ECM Documents 🛛 👻 👋
⊟ Job	Edit 🔹 Job Code 🔺	Job Name	* Control Job	* Customer	Customer Name	1
Enter Project Assign Project Contacts	Z C1044183	Ctrl job	ALL	KINGCEME	King Cement	Notes: showing
Enter Job	CANNIST	Cannistraro TEst	ALL			2 notes attached
Setup Job Pick List	CANNISTRAR	Cannistraro TEst	ALL			2 notes attached
Assign selected row	CENTRALSQR	Central Square	ALL 🔺	AXIS 🔺	AXIS Technologies	to record
Enter Budget	CFJOB100	cfjob100	ALL	ZZ-ACME	ZZ-Acme Supply	
Assign Overhead Cost Rates	n	-				

Sample of a screen in Table Mode, displaying a record with associated attachments and notes

Attachments and Notes enable the storing of additional information related to Enterprise objects, such as Projects, Jobs, Contract Forecasts, and Work Items. Attachments can be any type of file format (XLS, CSV, DOC, PDF ...), and require an appropriate application to open and view them. Notes, in comparison, are like Post-It Notes, and their text is displayed by their Enterprise application.

Screens displaying records that can have associated notes or attachments, or both, have the **Notes** or **Attachments** option on the Block Toolbar. Also, if a record has any associated notes or attachments, the

[Notes] or [Attachments] buttons will display how many, within brackets, as shown by the above screenshots.

### Notes



The above screenshot shows the Notes pop-up screen that is displayed when the **Notes** option is selected. In the Notes Block area, the fields displayed for each note are for display only.

The Closed field indicates if the note's status is Closed or Open. The Closed status can have different meanings for different companies. One meaning, for instance, is that the note is no longer current.

To edit or view a note, click the corresponding Pencil Icon. To permanently delete a note, click the corresponding Delete Icon ('X').

Notes are added using the Add Note Block area. Enter the note's subject line (if enabled in System Options), and enter the note into the note's text area. The **Closed** check-box is available if the note's entry is belated and no longer current, but could still be helpful. Once the note's information has been entered, click the [**Add**] button to save and add the note. The note will be displayed in the Notes Block.

Click the **[OK]** button to close the window, but note, this will not save the note. To save the note, the **[Add]** button must be used.

**NOTE**: The subject line for notes is optional. It will appear, system wide, if it is enabled by the flag, **Subject Line Appears In Notes Entry**. The flag is found on the **General** tab of the System Options screen (**System > Setup > System Options**).

### Attachments



The screenshot above shows the Attachments pop-up screen that is launched when the **Attachments** option is selected. This pop-up is comprised of two sections.

#### Attached Files - Section

The list of attached files can be collapsed or expanded using the  $\ge$  and  $\ge$  icons, respectively.

To view an attached file, simply click the file's name (file names are hyperlinks).

To delete an attachment, click on its corresponding Delete icon (X).

#### Upload - Section

To upload an attachment, there are two options:

#### **Upload Option 1**

Use the [**Browse**] button to bring up a File Manager window to search for and select the file to upload.

#### **Upload Option 2**

If you have a File Manager window already open, you can use the Drag-and-Drop method to attach the file by clicking and holding the mouse button on the file to attach, and then dragging it over to the drop area in the Attachments window, as shown in the below screenshot.



For both methods, once the green Upload Status Bar is full, showing that the upload has finished, click okay to complete the attachment.

		Block Toolbar
lcon	Name	Usage
View 🕶	View	Control how records are displayed in a table, such as how they are sorted, how the columns are ordered, and what columns are displayed. Refer to the " <u>Searches, Table Filters &amp; Sorts</u> " section of this guide for further details.
►	Query by Example (Filter)	Available in Table Mode, and used to filter the records displayed by the table. Refer to the " <u>Searches, Table Filters &amp; Sorts</u> " section of this guide for further details.
Freeze	Freeze	Prevent current record from being altered.
🖷 Detach	Detach	Detach the corresponding screen or block from the console.
D Search	Search	Similar to Query by Example, but has more options. Used to find and display a record or a group of records. When activated, a Filter (Search) section will appear with key fields that correspond to the fields of the records handled by the current application. Enter the particular value or text in the field(s) that you want to match records against and press the [Go] button. Refer to the " <u>Searches, Table Filters &amp; Sorts</u> " section of this guide for further details.
🖶 Insert Record	Insert Record	Create a new record for data entry and insertion into the system.
Insert Multiple Records	Insert Multiple Records	Bring up a table of new, empty records for data entry and insertion into the system.

### Block Toolbar Icons

		Block Toolbar		
lcon	Name	Usage		
🔁 Delete Record	Delete Record	Delete selected record from the system.		
Previous Record	Previous Record	When in Form Mode (displaying a single record), this option displays the record that is before the current record.		
Next Record	Next Record	When in Form Mode (displaying a single record), this option displays the record after the current record.		
© <sub>∞</sub> Workflows   ▼	Workflows	Deals with the workflows defined for the current application, block and row. Please refer to the Workflow manual for further details.		
Report Options		Used to set up and print reports for the screen or block. Please refer to the Form Letters manual for details about Form Letters.		
Export	Export	Creates an Excel, XLS file of the records handled by the current application or block within an application.		
₽ Import	Import	Used to import records into the system through an Excel, XLS file.		
Attachments	Attachments	Add or view attachments associated with the current record. Refer to the " <u>Block Toolbar Options</u> " section for further details.		
Notes	Notes	Add or view notes associated with the current record. Refer to the " <u>Block</u> <u>Toolbar Options</u> " section for further details.		
ECM Documents   ECM Documents		Enterprise Content Management		
User Extensions	User Extensions	Display user extensions, which are custom fields that have been added to the records handled by the current application. Refer to the "User Extension" section of the System Data manual for further details.		

# Tabs and Data Fields

JOB SETUP												Tab	le Mode	💾 Save	Exit	1	? 🛆	₽ ~	0
SELECTION CRITERIA																			
Company ZZ	▲ CMiC	Test Company	/																
JOB DETAIL												Tab	s grou	)					
Job Detail Settings Acco	ounts	AP Taxes J	Job Billing	WIP	Payroll	Bank	Security	Equipment	Locations	Compliance	-	rela	ted dat	a					
🔯 Search 🛛 🖶 Insert Record	🖶 Delete	Record 🔶	Previous Reco	ord 🗭	Next Record	🗞 Work	flows 🖛	🔒 Report Opt	ions 🖛 🖁	Attachments	Notes	Sec.	Documents		r Extensior	IS			
Asterisk	* Job Code	ZZ-WMT			Wal-mart Sto	ores - West C	hicago												
indicates a	Control Job	ALL			🔲 Bid Job	Bid Date			🖄 Status	Pending									
field	ng Method	Job Billing		•	Contract Z	Z-WMT		* Valid Y											
*	Customer	ZZ-WMT		۸	Wal-Mart S	tores Inc			Updat	te Customer									
Project	t Manager					Contact I	Vame					_							
White fields are	Terms	NET30			Net 30				-	Ligh	t blue	fields	are for						
for data entry 🦟	Location			۸						aisp	lay on	iy							
and display	Warehouse																		
Accountin	ng Method	Billing and Co	osts	-	* Default De	epartment	30												
* Revenue G	Generation	As Costs Incu	irred (Without	GL) 🔻															
Mar	rket Sector																		
Estimated	Start Date	01-Feb-2005	20			Estimated	End Date		14	5									
Inter-Branch Expense	e Category					Spread	Rule Code			-	— Drop	p-dow	n list						
Original Contrac	ict Amount		20,000,000	0.0000		Effe	ctive Date		14	5									
Current Contrac	ict Amount		20,087,668	8.0000		Project	Start Date		1	Ь									
Origina	al Earnings		C	0.0000	P	Projection Th	reshold %		0.00		- Text	t box							
		Show Graph	WBS	Notes	5														

ADF screen showing tabs and data fields

### Tabs

For applications that deal with a large number of fields, related fields are grouped into tabs, as shown in the above screenshot.

For Enterprise Console, the tabs displayed by the application can be customized, per user, using the Toggle Edit Mode option in the Main Toolbar.

### **Data Fields – Types and Navigation**

As shown in the screenshot above, data fields that are light blue are for display only, and white data fields are for both display and data entry. Data fields that are marked with an asterisk (\*) are mandatory fields.

#### Drop-Down Lists and List of Values (LOV)

Data entry fields that are drop-down lists, as shown in the screenshot above, have a pre-defined list of values called **List of Values** (LOV). Drop-down data fields limit the data that can be entered for that field by forcing the user to choose one of the predefined values.

#### **Data Field Navigation**

To move from one data entry field to the next, you can use the Tab keyboard key, and use the Shift-Tab keyboard keys together to move to the previous data entry field.

# Screen Modes: Table & Form Modes

To greatly enhance a user's experience with viewing, inserting or editing an application's records, Enterprise Console takes full advantage of Oracle's ADF technology to allow the user to specify how a screen (application) displays its records. Depending on a user's preference and task, a user can choose whether the screen displays all of its records in a table (Table Mode), or just one of its records (Form Mode).

To set which of these modes is the default for a screen, use the **Toggle Edit Mode** icon on the Main Toolbar. Then click one of the Pencil icons that appear, and in the pop-up, click the **Table Mode** tab, then check or uncheck the **Start This Screen in Table Mode** flag.

### Table Mode

с 📃	0	ASSET MAINTENANCE				Id New 💾 Si	ave 🕞 Exit 👔	© ▲ [≱ ≂ Q	
General Ledger     Accounts Payable     Accounts Receivable		Enter The Capital Approval Number	r	Screen in					
Job Costing     Subcontract Management	a.	Company ZZ	CMiC Construction Inc.	Table Mode	Multiple records are displayed in rows				
Change Management     Job Billing     Work Order Billing	Selection	ASSET DETAILS				B			
Requisitions  Purchase Order	Column	View • •	Detacn Disearch and Insert Record and Di	elete Record 🛛 🥹 Workflows 🛛 👻	Report Options        Export SELM Documents	· 중국 User Extension	s		
Inventory     Equipment Costing     Revention Maintenance		Edit * Asset	FastName		Description	Capital Approval Code	Insurance Group	PO Number	
Material Sales	Display record in	618301	WATER TANK-LODI (21000 GAL)	Equipment		4543			
Fixed Assets     Setup	Form Mode by	618302	WATER TANK-LODI (21000 GAL)	Equipment 💌		4543			
Assets	clicking Ealt Icon	BENZ33	BENZ33	Equipment	BENZ33	4543	EQUIPMENT		
Enter Assets Enter Additions and	Betterments	BENZ44	BENZ44	Equipment	BENZ44	4543	EQUIPMENT		
Dispose of Assets		BENZ56	BENZ56	Equipment 💌	BENZ56	4543	EQUIPMENT		
Assign Cost Codes t	Assign Cost Codes to Equipment		Cell Phone - Blackberry	Equipment	company cell phone - Blackberry	5643	EQUIPMENT		
⊞ Query Sel			Cell Phone - iPhone	Equipment 💌	company cell phone - iPhone	5643	EQUIPMENT A	<b>A</b>	
Report FCC     Utilities with			Series 400 Crane with Bucket	Equipment	Std Crane with extra addons	5643	EQUIPMENT	PO1	
US Payroll	init and italieu alea	HOFFICE	Head Office	Building	Head Office in Orlando				
International Payroll		<						Þ	

Sample of a screen in Table Mode, displaying multiple records in rows

The Table Mode displays multiple records in rows. Depending on the screen, the fields of these records can be edited in this mode, or just viewed. To view a single record in Form Mode, click the record's corresponding Edit icon, as shown in the above screenshot.

Operations related to the records can be done through the Block Toolbar, just above the table. To select a record (for deletion, for instance), click the area in the Selection Column (framed by red rectangle) that corresponds to it. To filter the displayed records, or to search for a record or group of records, refer to the following "Searches, Table Filters & Sorts" section in this guide.

# Form Mode

0	ASSET MAINTENANCE	Table Mode 🗎 Save 🕩 Exit 🚯 🕐 🛆 ⊉ 🗢 🔾
General Ledger     General Ledger     Accounts Payable     Accounts Receivable     Job Costing     Job Costing     Subcontract Management	Enter The Capital Approval Number SELECTION CRITERIA Company ZZ	Screen in Form Mode
Change Management     Job Billing     Work Order Billing	ASSET DETAILS	▶ Next Record : ®L, Workflows   ▼ ⊕ Record Octions   ▼
Requisitions     Purchase Order     Inventory	Asset CELL-8  Cell Phone - Blackberr  Description company cell phone	y *Type Equipment
Equipment Costing     Tabs group     Material Sales     Tabs group     related data	General Depreciation Distribution Note Real Estate	Equipment Detail Tosurance Graph FOUIDMENT a
Fixed Assets     Setup     Assets     Assets	PO Number Activation Date 15/Jun/2015	
Enter Additions and Betterments Dispose of Assets Anima Cast Codes to Environment	* Date Entered 29/Jun/2015 18	Interest Type   Fixed  Interest Rate Override 5
Transaction	Replacement Value 450	
ш керот Ш Utilities П US Payroll	IM ■ Tax Exempt I = Is there a Lien?	Lien Notes

Sample of a screen in Form Mode, displaying a single record

The Form Mode displays a single record, and it may group the record's data into tabs. To switch the screen back to Table Mode, click the [**Table Mode**] button on the Main Toolbar, encircled by green oval in the above screenshot.

Operations related to the record can be done through the Block Toolbar. To search for a record or group of records, refer to the section below, "Searches, Table Filters & Sorts".

# Searches, Table Filters & Sorts

Enterprise Console takes full advantage of Oracle's ADF technology to simplify and enhance advanced searches, customize how tables display their records, and enhance how a table's records are sorted (ability to sort records by up to 3 columns).

In this section, the Block Toolbar options, **Query by Example** and **Search** are explained, which includes a section detailing how the Search option can be used to set a default filter for a screen's table. The Query by Example option is only available for a table of records, when the screen is in Table Mode, while the Search option is available when the screen is in Table Mode or Form Mode.

## Query by Example

Э [	0	EMPLOYEE PROFILE				Add New 💾 Sav	re 🕞 Exit 🕡 🕐 🛆	[≱ ≂ Q
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Accounts Payable								
Accounts Receivable								
		Country US						
Subcontract Management					entered.	search parameter		
Change Management	Juany by	EMPLOYEE PROFILE MAINTENANCE	E					
E Job Billing	auery by		Stand Street Street Street Street St	water In Du		0.554.0	Para de la composición de la	
Requisitions	Example	View The Preeze	Jetach I I Search am Insert Record am Delete Record 66 t	voricitows  * 😁	Report Option + By Export By Ini	port & ECM Documents   * 45 User	extensions	
Requisitors     Purchase Order								
Inventory ro	ow of empty	<b>X</b>			smith			
E Equipment Costing								
Preventive Maintenance	elus to		res	suit				
Material Sales	nter search	Edit * Employee	EmpFullName		* Last Name	* First Name	Initial	
Fixed Assets	arameters							
US Payroll	anametera	1044589	Smith George		Smith	George		
International Payroll			anne acorge			area ge		

Sample of using Query by Example

The **Query by Example** option is on the Block Toolbar that corresponds to a table of records. It is used to filter the records displayed by the table.

When activated, empty fields (columns) that correspond to the fields of the records will be displayed. Enter the particular value or text in the field(s) that you want to match records against and press Enter to have the matched records displayed. To remove the filter, click the Query by Example icon again. This option is a basic filtering method; however, it supports the use of wildcards. For details about the use of wildcards, please refer to the "Wildcards – Pattern Matching" section of this guide.

For advanced filter (search) operations, which use relational operators (>, >, >=, ...) and variables, and to allow for more search options such as searching for blank fields, Enterprise Console provides an Advanced Search Mode. As documented below, the Advanced Search Mode is found in the **Search** option of the Block Toolbar. For details about the Advanced Search Mode, however, please refer to the "<u>Advanced</u> <u>Search Mode</u>" section of this guide.

### Search

0	EMPLOYEE PROFILE		Ad	swe De Exit ① ⑦ ▲ 🖓 🗢 🔾
General Ledger     Accours Payable     Accours Payable     Joc Costing     Joc Costing     Subcontract Management     Least 1 of the     Joc Diars     Paratase Order     Intervention     Intervention     Requestions     Selected search	Country US EMPLOYEE PROFILE MAINTENANC Filter Match @ Al O Any Employee Name Name Hourly V	Peyroll Company A Pey Stun A Pey Group A	Search section in Basic Mode	to switch search to Advanced Mode
E Fixed Assets parameter	Hire Date	Work Location		
International Payroll     Human Resources     Search     Personnel	View - T La Freeze	Jean 🌳 🏾 Search 🚓 Insert Record ক Delete Record 🕲 Workflow	click to per	form search $\rightarrow$ Go Reset Sove
Employee Profile Education Memberships Documents Emologies Dolthing	Edit * Employee	EmpfullName	* Last Name	* First Name
Relative Relationship Codes	ALT-WK-ASHBY	Ashby Martin	Ashby	Martin
Asset Tracking     Discipline Tracking	ALT-WK-JESSUP	Jessup Dave	Jessup	Dave
Suitable Positions for Employees	ZZ-9876	Trucker John	Trucker	John
Benefit Administration Applicants	📓 VA-100	Victor Vicram	Victor	Vicram V
Training/Certification	ALT-WK-AUTRY	Autry Scott	Autry	Scott

Sample of a search section in Basic Mode

The **Search** option is also on the Block Toolbar, and it is available when the screen is in Table Mode or Form Mode. When activated, a Filter (Search) section will appear with key fields that correspond to the fields of the displayed records. It is similar to Query by Example, in that it is also used to find and display a record or a group of records, but it has more options, such as simplifying the use of relational operators and multi-variable searches. Also, it has two modes: Basic Mode and Advanced Mode. The Advanced Mode handles multi-variable searches and the use of relational operators in a simplified manner.

To do a basic search, enter the particular value or text in the field(s) that you want to match records against and press the **[Go]** button. To match all or at least one of the search parameters entered in multiple fields, select either **All** or **Any** from the **Match** option, as shown in the above screenshot. To remove the search section, re-click the **[Search]** option on the Block Toolbar.

Wildcards (%, \_) can also be used, and their use is covered in the "<u>Wildcards – Pattern Matching</u>" section of this guide.

For advanced searches, using relational operators, and to search for blank fields, click the [Advanced] button to switch the section to Advanced Mode. In Advanced Mode, the search (filter) section contains drop-down lists of search operators for each field to search on. The use of Advanced Mode is covered in the "Advanced Search Mode" section of this guide.

#### Saved Searches and Default Table Filters

Personalize Saved Searches	6
Saved Searches	
Quick12	
Delete	
* Name	
Quick12	
Set as default	
	Apply OK Cancel

To save a specified search and set it as a default filter for the current application and user, click the **[Save]** button. On subsequent uses of the application, the saved search will act as a filter, filtering the

records displayed by the table. To remove the saved search as the table's default filter, or to change which saved search is to be the table's default filter, click the arrow for the **Saved Search** drop-down list, encircled by the green oval in the second screenshot above, and select **Settings**. In the pop-up window that appears, as shown above, select the saved search from the drop-down list and check or uncheck the **Set as default** flag. To use a saved search, use the **Saved Search** option, encircled by the green oval in the previous screenshot, to select and load a saved search.

## **Sorting Displayed Records**

View - Freeze	🚡 Detach 🛛 🗖 Searc	ch 🖶 Insert Record 👼 Delete Record 🛛 🗞 Workflows 🛛 💌 🖨 Report Options 🗍 💌	Export	Import 💡 ECM Docu	ments 🛛 👻 모양 Extensions	
Freeze Detach	View opt	ion of Block Toolbar	* La	ast Name	* First Name	
Sort +	Ascending	View's Sort option: Typically, table will have mo	re than			
Reorder Columns	Descending 21	one column, and Sort's Advanced option must b	e used		Daniel	-
77 10/ 101	Advanced		laborer.		Carab	

To sort the records displayed by a table, click the **View** option on the table's Block Toolbar, then select **Sort** and choose the **Advanced** option (typically, tables will have more than one column, and Sort's **Advanced** option must be used).

Ad	vanced Sort				$\times$
	Sort By * Last Name	•	<ul> <li>Ascending</li> <li>Descending</li> </ul>		
	Then By Next Review Date	<b>-</b>	<ul> <li>Ascending</li> <li>Descending</li> </ul>	records can be sorted by up to 3 columns	
	Then By	•	<ul> <li>Ascending</li> <li>Descending</li> </ul>		
				OK Canc	el

In the pop-up window that appears, choose up to three columns by which to sort the table. You can also choose whether you want the columns to be sorted in ascending or descending order.

# **Advanced Searches**

This section details the use of more advanced searches, which use wildcards, relational (comparison) operators, and variables. The use of wildcards is the same for both ADF and Forms, however, the use of relational operators and multi-variable searches differs between the two products. As documented below, ADF simplifies the use of relational operators and multi-variable searches through the Advanced Search Mode option.

## Wildcards – Pattern Matching

Wildcards can be used in the search parameters entered into the fields to search against.
с	0	EMPLOYEE PROFILE				Add New 💾 Save 🕞 Exit	0 • 1 A  🛈
General Ledger     Accounts Payable     Accounts Receivable     Job Costing     Subcontract Management     Change Management     Job Billing     Work Order Billing     Banuitions	Query by Example	Country US EMPLOYEE PROFILE MAINTENAN View	Se: ce the Detach @ 5 arch ⊕ Ins	arch parameter using • "%" wildcard ert Record 🚳 Workflows	▼ ↔ Report Options  ▼ 🎧 Export 😵 ECM Documents	$  = \frac{Q}{\delta T_0}$ User Extensions	
Requisitions     Purchase Order     Inventory     Equipment Costing     Preventive Maintenance     Material Sales     Fixed Assets	row of empty fields to enter search parameters	Edit * Employee	tijohntis matched records	EmpFullName	* Last Name	* First Name	Init
US Payroll     International Payroll     International Payroll     Human Resources     Setup     Personnel     Employee Profile     Education     Memberships	P	ZZ-WK-HR1 ZZ-JOHNJOYCE ZZ-9876 ALT-WK-LOUIS ( ) )	Johnson Sarah Joyce John Trucker John Louis John		Johnson Joyce Trucker Louis	Sarah John John John	

Sample screen of Enterprise Console, in which the "%" wildcard was used in a query (filter)

When entering a search parameter in a search/query field, wildcards can be used to create a pattern to match against the pattern of the corresponding field of the records. They are used when exact matches are not sufficient. There are two wildcards: one represents any *single character*, and the other represents any *string of characters*. They are used with regular characters to create a pattern, as a search parameter, and the pattern is used to match fields that follow the specified pattern.

#### Wildcard Characters

Single Character: "\_"

String of Characters: "%"

#### **Example Patterns and Possible Matches**

Example Patterns	Possible Matches
JON_S	JONES, JONAS, JONOS, JON-SRA
JON%S	JONSTONES, JONES, JONAS
ENTER%	ENTER, ENTERS, ENTERTAIN
S_AR_	SHARE, SMART, SHARP, SNARE
S%AR_	SAMARTRA, SHARE, SMART

# **Advanced Search Mode**



Sample of a search/filter section in Basic Mode

Advanced searches have been simplified and enhanced through the Advanced Mode of the **Search** option on the Block Toolbar. To switch the Search (Filter) section from Basic Mode to Advanced Mode, click the **[Advanced]** button, as shown in the above screenshot.

C (	EMPLO	OYEE PROFILE					///////////////////////////////////////	Add New Save	Exit (j)		0
General Ledger     Accounts Payable     Accounts Receivable     Match option:     match all or at -	⊻ Filter Match @	All 🔿 Any	Sea	arch option o ock Toolbar	f			Ba	sic Saved Sear	ch Quick •	•
Joe Control Kanagemen least 1 of the Charge Managemen least 1 of the pho Billing Work Order Billing Purchase Order Invertery Preventery	Employ Nan Tyj Hire Da View <del>v</del>	e Starts with Starts with Ends with Equals Does not equal Less than or equal to Greater than or equal to Between Not between	to Search The Insert R	Payroll Company Pay Run Pay Group Work Location	Equals Equals Equals Equals	▼ ▼ ▼ ▼	Seal	cch section in vanced Mode	click to to Basic	switch Mode	2
Pied Assets     US Payrol     Us Payrol     Userational Payrol      Human Resources     Seque     Personnel     Employee Profile     Education     Memberships	Edit	Does not contain Is blank Is not blank -WK-ASHBY // -WK-JESSUP J 9876	Ashby Martin Jessup Dave Trucker John	EmpFullName			* Last Name Ashby Jessup Trucker	* First N Martin Dave John	ime		* E
Documents	VA-	100	Victor Vicram				Victor	Vicram	v		

Sample of a search (filter) section in Advanced Mode, which has drop-down lists of search operators for advanced searches

In Advanced Mode, the search section contains drop-down lists of search operators and options like "Is blank" to search fields against, as shown in the above screenshot. Enter in the search parameters, and choose whether all of them or at least one of them must match a record via the **Match** option. Click the **[Execute]** button to run the search.

#### **Date Formats**

For dates, use either the format DD-MON-YY (01-JAN-15) or DD/MON/YY (01/JAN/15).

# **CMiC Logs & Queries**

CMiC Logs and Queries augment the standard reports delivered with each module in a more dynamic fashion. Both provide the ability to:

- Filter the data
- Rearrange the data
- Export the data to Excel

Logs are lists of data, some with hyperlinks. Queries are more structured and have additional programmed functionality.

# **CMiC Logs**

CMiC Logs support the ability to enter and save filters so they can be recalled and executed repeatedly.

Filter       Exter with       Image: Starts with       Exter with       Image: Starts with       Ima	JC - TRAN	SACTION DETAIL	LOG												(i) (i)	
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Job     Starts with     Ctrl Cat     Starts with <ul> <li>Rev Num</li> <li>Equals</li> <li>Charts with</li> <li>Creater than</li> <li>Creater than</li> <li>Source Description</li> <li>Starts with</li> <li>Creater than</li> <li>Contains</li> <li>Source Description</li> <li>Starts with</li> <li>Charts with</li> <li>Charts with</li> <li>Charts with</li> <li>Creater than</li> <li>Contains</li> <licontains< li=""> <licontains< li=""></licontains<></licontains<></ul>	JcdtOraseq	Equals	-	Ctrl Phase	Starts with	•			Draw Num	Equals	•		Quantity	Starts with	•	
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Sparale     Sparale     Post Date     Equals        •     Mome Comp     Starts with        •        j.cdt/m/kum       Starts with        •         Ref. Date       Less than       Batch       Equals        •        Less than        j.cdt/m/kum       Starts with        •        j.cdt/m/kum       Starts with         class with         class with        vither and the starts with	Phase	Starts with Ends with	r <sup>2</sup>	Reference Description	Starts with	•			Defer Bill	Starts with	•		JcdtAmtSecure	Starts with	•	
Ref Date     Less than *     Less than *     Less than *     Home Dept     Starts with     •     Less than *     Less than * <thless *<="" th="" than=""></thless>	Cat	Equals		Post Date	Equals	•	10		Home Comp	Starts with	•		JcdtInvNum	Starts with	•	
In the second region to equal to a control region to equal	Ref. Date	Less than	B	Batch	Equals	•		<b>A</b>	Home Dept	Starts with	•		JcdtBillAmt	Equals	•	
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Not between Source Contains Does not contain	Amount	Greater than or equal to Between		Source Description	Starts with	•			Memo	Starts with	•		JcdtWbsvCode2	Starts with	•	
Does not contain	Source Code	Not between Contains		Source Document	Starts with	•			Change Orders	Starts with	-		JcdtWbsvCode3	Starts with	-	
Reference Code Is blank Unbilled Revenue Amt Equals 🔹 PCI Line Num Equals 🔹 🖨 jcdtWbsvCode4 Starts with	Reference Code	Does not contain Is blank		Unbilled Revenue Amt	Equals	•		\$	PCI Line Num	Equals	•		JcdtWbsvCode4	Starts with	•	
Is not blank Curreny Starts with Curreny Starts with Island Starts Wit	Crew Code	Is not blank Starts with		Currency	Starts with	•			IcdtlourCode	Starts with	•		IcdtWbsvCode5	Starts with	•	4
Ouantity Equals   Excho Curr Starts with   Kottinicodese: Starts with    Kottinicodese: Starts with    Kottinicodese: Starts with    Kottinicodese: Starts with    Kottinicodese: Starts with    Kottinicodese: Starts with     Kottinicodese: Starts with     Kottinicodese: Starts with      Kottinicodese: Starts with	Ouantity	Equals	•	Excha Curr	Starts with	•			cdtSrcCodeSec	Starts with	•		- IcdtWbsvCode6	Starts with	•	4
WM Starts with	WM	Starts with		Excho Rate	Equals				IndtSrcDesc	Starts with			- IcdtWbsvCode7	Starts with		1
(rith) Satu wh	Ctri Joh	Starts with	•	Excha Amount	Equals				ledti init	Fouals			IcdtWbsvCode8	Starts with		1
entre mue des la Varia rite des	carjoo			excity Anounc	equilib				Juconic	edoorg				Starte With		4
Go Reset Save Add Fields	_												Go	Reset Save	Add Fields	z

In addition, the QbyX icon allows you to further query and refined the records displayed.

View 🕶	Format 👻 🕎 🛱	Freeze 🖷 Detach 📱 V	Vrap 🐺 Cle	ar Query 🖪 Export 🔗 g	ECM 🔻									
Search	1	Go												
	cm1001	1	L	From: 1/1/2015 🚯										
Attachmen	it Job	Phase	Cat	Ref. Date	Туре	Amount	Source Code	Reference Code	Crew Code	Quantity	WM	Ctrl Job		Ctrl Phase
	CM1001	00015	L	31-Jan-2015	в	20,260.00	GSACH	CM1001-0011		225	HR	ALL	00	
	CM1001	00020	L	31-Jan-2015	в	197,130.00	GSACH	CM1001-0011		1798	HR	ALL	00	
	CM1001	01130	L	31-Jan-2015	в	98,556.00	GSACH	CM1001-0011		1060	HR	ALL	01	
	CM1001	01135	L	31-Jan-2015	в	184,787.54	GSACH	CM1001-0011		1626	HR	ALL	01	
	CM1001	01135	L	16-Feb-2015	с	480.00	1003	SM		8	HR	ALL	01	
	CM1001	01135	L	31-Mar-2015	в	8,967.83	GSACH	CM1001-0013		64	HR	ALL	01	
	CM1001	01135	L	01-Apr-2015	c	1,200.00	1004	SM		8	HR	ALL	01	
	CM1001	01135	L	15-May-2015	с	115.86	1004	SM		0	HR	ALL	01	
	CM1001	01135	L	01-Jun-2015	с	1.200.00	1004	SM		8	HR	ALL	01	
	CM1001	01135	L	01-May-2015	с	1,200.00	1004	SM		8	HR	ALL	01	
	CM1001	01135	L	16-Jan-2015	c	480.00	1003	SM		8	HR	ALL	01	
	CM1001	01135	L	16-Jan-2015	с	1,200.00	1004	SM		8	HR	ALL	01	
	CM1001	01135	L	01-Feb-2015	с	480.00	1003	SM		8	HR	ALL	01	

You can change the view of the log:



You can change the display by dragging and dropping columns:

View 🔻 Format 🔻	🕎 🌇 Freeze 🖷 De	tach 📱 Wrap	🐺 Clear Query 🛛 🔣 Ex	port 🧣	ECM 🖛						
Search	Go										
cm1001		L	From: 1/1/2015 🖏 To: 3/31/2015 🖏	с							
Job	Phase	Cat	Ref. Date	Туре	Amount	Source Code	Reference Code	Crew Code	Quantity	WM	
CM1001	01135	L	16-Jan-2015	с	480.00	1003	SM		٤	HR	ALL
CM1001	01135	L	31-Jan-2015	с	116.41	1003	SM		C	HR	ALL
CM1001	01135	L	01-Feb-2015	c	480.00	1003	SM		8	HR	ALL

### In this example, the Quantity field was dragged and dropped to the left of the Amount field:

View 🔻 Format 🔻	🕎 🌇 Freeze 📲 De	tach 🖳 Wrap	🐺 Clear Query 🔣 Ex	port 🛔	ECM 🕶					
Search	Go	1								
cm1001		L	From: 1/1/2015	с	2					
Job	Phase	Cat	Ref. Date	Туре	Quant <del>i ()</del> 🔨	Amount	Source Code	Reference Code	Crew Code	WM
CM1001	01135	L	16-Jan-2015	с	8	480.00	1003	SM		HR
CM1001	01135	L	31-Jan-2015	с	0	116.41	1003	SM		HR
CM1001	01135	L	01-Feb-2015	с	8	480.00	1003	SM		HR
CM1001	01135	L	01-Feb-2015	с	8	1,200.00	1004	SM		HR
CM1001	01135	L	28-Feb-2015	с		72.51	1003	SM		HR
CM1001	01135	L	28-Feb-2015	с	0	115.86	1004	SM		HR
CM1001	01135	L	15-Feb-2015	с	0	115.86	1004	SM		HR

#### Results can be exported to Excel:

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Job	Phase	Cat	Ref. Date	Туре	Quant <del>i (</del>	Amount	Source Code	Reference Code	Crew Code	WM
CM1001	01135	L	16-Jan-2015	с	8	480.00	1003	SM		HR
CM1001	01135	L	31-Jan-2015	с	0	116.41	1003	SM		HR
CM1001	01135	L	01-Feb-2015	с	8	480.00	1003	SM		HR
CM1001	01135	L	01-Feb-2015	с	8	1,200.00	1004	SM		HR
CM1001	01135	L	28-Feb-2015	с	-	72.51	1003	SM		HR
CM1001	01135	L	28-Feb-2015	с	0	115.86	1004	SM		HR
CM1001	01135	L	15-Feb-2015	c	0	115.86	1004	SM		HR

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2	CM100	01 11	135 L	16-Jan-15	С	480	1003	SM		8	HR /	ALL		L ALL	SM20152	31-Jan-15	6405 PY	Dean Harris		695.2	USD	USD
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4	CM100	01 11	35 L	01-Feb-15	С	480	1003	SM		8	HR /	ALL		L ALL	SM20153	15-Feb-15	6407 PY	Dean Harris		695.2	USD	USD
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7	CM100	01 11	35 L	28-Feb-15	с	115.86	1004	SM		0	HR /	ALL		L ALL	Semi Monthly20154	28-Feb-15	6410 PY	Gord Rawlins		115.86	USD	USD
8	CM100	01 11	35 L	15-Feb-15	с	115.86	1004	SM		0	HR /	ALL		L ALL	Semi Monthly20153	15-Feb-15	6408 PY	Gord Rawlins		115.86	USD	USD

#### Drill Down via column links for Details

AP - IN	VOICE LO	G										© ©
⊻ Filter										Advanced	Layout	Saved Search Default Company 💌
Match 🖲 A	ll 🗇 Any											
Company	10											
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Search		Go										
	Vendor	Vendor Name	Invoice Code	Batch #		Invoice Date	Due Date	Invoice Amount	Retainage Amt	Tax Amount	Invoice Total Amount	Outstanding Amount
10	01031006	TMM Mechanical	00125	4352	31-Jan-2014	28-Apr-2014	28-May-2014	900.00	100.00	0.00	900.00	0.00 Materials Purchase
10	01031006	TMM Mechanical	097515	6854	01-Sep-2015	01-Sep-2015	01-Oct-2015	10,900.00	100.00	550.00	11,450.00	1,450.00 ULV - Campus West
10	01031006	TMM Mechanical	1	1268	30-Apr-2012	04-May-2012	03-Jun-2012	720.00	80.00	0.00	720.00	0.00 General Construction
10	01031006	TMM Mechanical	20937182	7042	30-Sep-2015	30-Jun-2015	30-Jul-2015	1,230.00	-1,230.00	0.00	1,230.00	1,230.00

AP - 1	INVOICE	DISTRIB	UTION DETA	IL LOG		
≥Filter						
View 🔻 F	Format 👻 🍸	Freeze	🖶 Detach 🛛 🖳 Wrap	The Clear Query	Export	😵 ECM 🕶
Search			Go			
Туре	Company	Job/Dept/Eqp	Phase/Acc/Component	Cat/Trancode	WM	Distibution Amount
G	10	00	11103		\$	550.00
G	10	00	21017		NA	-100.00
G	10	00	21015		NA	-11,450.00
J	10	13530	09680	S	LS	1,000.00
J	10	13530	09100	S	LS	10,000.00

# **CMiC** Queries

Queries have additional programmed functionality, such as popups for details launched via buttons, such as those highlighted below:



AP INVOICE QUERY							E Save	Exit 👔	@▲[	₽ ~ 0
SELECTION CRITERIA										
* Company 10	now Volded Vouchers									
Vendor										
Job TH001 🔺 Arbor Village - Unit	1									
From Date	🗞 Query	y Data								
VOUCHER DETAILS										
View 👻 🕎 🌆 Freeze 🖀 Detach 🔯 Search 💩 Workflows 👻 🖨 Report Option	🗧 🖛 Export 🔗 ECM Documents	👻 🖧 User Extensions								
Current Invoice	Original Invoice Outstanding	M	On	Exceed PwP				Close		Serie
Vendor Invoice # Invoice Date Post Date Amount	Amount Amount	Retainage Amount En	Hold	Hold Hold	Status	Na	me	Status	Voucner	• Code
90223 TH001D1 25-Nov-2015 25-Nov-2015 518,904.0	576,560.00	0.00 57,656.00	576,560.00		N	Normal		с	2740	SUB
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Vendor Name The Makolm Company Inc. Description TH001 001 Draw 1										
	comphance									
Home Refresh	Pr	ev ] Next ] Upload ] Image Expo	nt Query Mode Mo	/e Delete Sa	ve Update	Submit Upload M	Iultiple Docume	ents Export to E	ixcel	
Image Manager	*	Document Name	TH001.001D1.pdf		<b>_</b>		Submit S	ubmitted		6
2. SC Pay Application [1]										
			SI	C Pay Request H	leader					۲
		Company <sup>®</sup> 10	CMIC CONSTRUCTION INC	. –						
		Job TH001	ARBOR VILLAGE - UNIT 1				-			
		Vender Code 90223	THE MALCOLM COMPANY	( INC - 437 OCE)	MSIDE DDIVE					
■ P ★ Page: 1 of 2 - + 80% ÷	N >	PO or Contract No. TH001.00	INTERIOR RENOVATION	, ino 431 00D			-			
	<u>_</u>	Invoice No. TH001D1								
		Inv. Amount 518,904	.00							
Pay Application Form - Page 1 Al4 Docum	rt 6702 F	Gross Amount 576,560	.00							
TD: CMC Construction lar. Brokert		Invoice Date 11 25	15							
1 Liberty Plaza, Suite 900 Arbor Village		Discount Date 11 25	15							
New York, NY 10002	F	Description TH001.00	1 Draw 1							
FROM: The Malcolm Company Inc.	F.	Warning:	Contract amount exceeded.							
437 Oceanside Drive Seartle, WA 98118		· · · · · · · · · · · · · · · · · · ·								
SUBCONTRACTOR'S APPLICATION FOR PAYMENT CERTIFI	ATE OF THE SUBC			C Echodulo of V	taluor					
Application to make for payment, as anown below, in connection with the Contract. Continuation oneer, aux 4/40, is interesting attached.	the above represent e of accomplishment change transformers becomplished	Cost Cost Contract Code Type Amount	Prev Cert F Amount	Retainage Percent	Current Retainage	Current Cor Amount A	mpleted mount	Amount Retained	Retainage Release	Actions
ORIGINAL CONTRACT SUM     S 575,350.00     undersig     Australia Contract     S 575,350.00     undersig     S 5	d and CMIC Construction		0	and provide and a	t Datalla					0
CONTRACT SUM TO DATE (Line 1 +/- 2)     S 575,350.00     Contract     A TOTAL COMPLETER & STORED TO DATE (Col G on G202)     S 575,550.00     Contract     House	and subcontractors nance of this contract	Task Name	Task Amount	Completed Amou	int Current Amour	t Contract Retain	age Pct Comp	Current Retani	nage Release	d Actions
5. RETAINAGE: as noted	the reverse side. If 08.007 Counte	r Tops	2,790.00	4,000.00	4,000.00	400.00	143.37	0.00		
a. 10 % of Completed Work <u>5 57,656.00</u> complete (Column D_E on G700) Social Se	rity laws and Unemp 09.001 Wood F	Flooring	146,000.00	146,000.00	146,000.00	14,600.00	100.00	0.00		
b% of Stored Material and Work (Column F on 0205) the performance of the perf	ten's Compensation 09.003 Cabinel	its	7,560.00	7,560.00	7,560.00	756.00	100.00	0.00		
Total Retainage (Lines Sa + Sb or Total in Column 1 of 6703)	09.005 Drywal 09.006 Paintin	a	410,000.00	410,000.00	410,000.00	41,000.00	100.00	0.00		
6. TOTAL EARNED LESS RETAINAGE <u>\$ 518,904.00</u> (Line 4 less Line 5 Total) SUBCD	Retaina	age			-57,656.00			0.00		
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT S - By: Free Line 6 from origin certificate)	Totals Totals		575,350.00	576,560.00	518,904.00	57,656.00	100.21	0.00		
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NET CHANGES by Change Order S . S .	- Comp Date Comp	Compliance Code -		Jonaing Com	pany	Stan Date		und Date	Amount	Actions

Image searches may be defined to drill back to scanned images in CMiC's ECM repository:

# Reports

All Enterprise modules that handle records have a **Reports** menu option that lists the module's reports. This section covers running reports for ADF screens.

# **Printing Reports**

Enter Parameters for: Outstanding	J Vouchers By Job Report (AP1600)	drop-down lists with List of Values for selection	×
* Company	ZZ	CMiC Construction Inc.	
From Job	007715980	Museum Exhibition Center	
To Job	YR0008	Baltimore Medical Center	
Include Vouchers With No Jobs	Y	Include Vouchers With No Jobs	
Include Multi-Job Vouchers	Y	Include Multi-Job Vouchers	
Include Jobs From All Companies	N	Do Not Include Jobs From All Companies	
Destination	Preview Preview op options for p	tion: displays report on new tab, which provides rinting reports and downloading reports to	
Output Format	PDF specifed loca	ation; <b>Email option</b> : used to email report	
	choose for	mat of report Run Report Cancel	

Enterprise Console: Sample of a printing options screen

ADF based screens use Oracle's ADF technology and modern web browsers to streamline reporting. Above is a screenshot of a printing options screen, after choosing a report from a module's **Reports** menu. Printing options screens contain drop-down lists with preloaded values (List of Values) and other entry fields to set the parameters for restricting the records that get printed on the report.

After selecting the parameters, choose the reporting option using the **Destination** drop-down list. **Preview** displays the report on a new tab of your web browser, and the browser is used to print the report, set printer settings if necessary, or to save (download) the report to a desired location. **Email** brings up an Email window for emailing the report. Further details are provided in the following "*Reporting*" section.

**NOTE**: Ensure your web browser is set to allow pop-ups for the server running CMiC Enterprise, as reports are displayed on new browser tabs.

# Reporting

# **Preview and Print**

Select **Preview** from the **Destination** field of the Reporting Options window, and use the **[Run Report]** option to preview the report on a new tab of your web browser. From the browser, select its printing option to bring up the print settings window to print the report.

#### Preview and Save Report to User Specified Location

Select **Preview** from the **Destination** field of the Reporting Options window, and use the **[Run Report]** option to preview the report on a new tab of your web browser. From the browser, select the save or download option, depending on your browser, to bring up a window to navigate to a location to save the report.

#### **E-Mail Report**

Email		
* To:	: mike.fern@cmic.ca	
Cc:		
Bcc:	:	
* Subject:	Outstanding Vouchers By Job Report	
Message:	Attached is the report, Outstanding Vouchers By Job.	.4
	click [OK] to create and email report ——>	OK Cancel

Select **E-Mail** from the **Destination** drop-down list of the Reporting Options window, and select the report's format (PDF, HTML, Excel, RTF, CSV) using the **Output Format** drop-down list. Next, click the [**Run Report**] button to bring up the Email window, as shown above, to enter the email information. To enter more than one address, use a comma as a separator. Click [**OK**] to create and send the report via Email.

# Help on Main Toolbar

ADF: Help icon found on a screen's Main Toolbar

In ADF, the Help Icon is located on the screen's Main Toolbar. When the Help option is clicked, a new browser window will be launched for the Help application.

System Data	me of manual, corresponding to a module of Enterprise
Contents System Transform Data System Transform Contents, inter- and searcher related to Current man Security	Your Are Here: System Data         XX,         System Options         The System Options creen is used to set defaults related to options that affect more than one application as well define system level parameters such as job queue intervals, print servers, and Login patha.         II       Related Information:         Others Option Tab         Image: Tab         Applied Tab         TypeII Tab         TypeII Tab         TypeII Tab         TypeII Tab         Logo Path

Subject Line Appears In Notes Entry

Sample of the Help screen

This will open a version of the 'User's Reference Manual' for the current application and allow you to navigate within the loaded manual. Above is a sample of a standard help screen for Enterprise's System Data module.

The side panel displays the contents of Help for this particular module. A folder can be opened by clicking it, and a folder's contents can be displayed by clicking on a page icon. The manual's text and links to its sub-sections will display in the larger panel. The Previous and Next icons along the top-left of the screen, next to the red rectangle in the screenshot above, can be used to move through the sections of the manual.

# Contents

System Data	Application @ Corport	ite CM/C
Contents ×	Your Are Here: System Data	
CSystem Data		

Clicking the Contents page will redisplay the Table of Contents for the current manual. This might be necessary after having used the Index or Search options and needing to view the manual's Contents again.

### Index

System Data		Application @ Corporate CM/C
Index ×	Your Are Here: System Data	
Look for		
	Overview – System Data	
Add New Fields to an (Existing) Extensic	•	

This option will display the manual's Index. Note that a **Look For** option appears to filter the Index as needed.

# Search

System Data			<b>Application</b>	Corporate CM/C
Search ×	I dis fenerana Dillina	2		^
Search for tree view Go	Record: 1/1	<0SC>		
Highlight search hits     Greating Tree Views     bold	The CMiC Enterprise Software create your own Tree Views. T	is shipped with a default tree view wh he CMiC Tree View (CMIC_TRD) ca	iich can be used as is or you ca nnot be modified.	m use it as a basis to
Tree View Editing Command Options UE Table Maintenance	When creating a new menu ther duplicate an existing menu, ma	re are two choices, you may start from ke sure the cursor is on the menu code	scratch or duplicate an existing to be duplicated then press the	ıg menu. To e [ <b>Duplicate</b> ]

The Search option is for searching the current manual for particular words.

As shown in the screenshot above, the words entered for the search can be highlighted in the display region by clicking the **Highlight search hits** check box. By default, the flag is checked, however users may uncheck the flag that will highlight on the page the actual words matching the search term.

Additionally, the page selected from the Search results, as shown above, will be shown in bold.

# **Next Page/Previous Page**

System Data		CMIC
🕼 Contents 📓 Index 🔍 Search 💽 🕘 🗐	Application Corporate	

These options allow the user to navigate through the Help on a page by page basis. Next will display the next page, with respect to the page currently displayed, and Previous will display the previous page.

# **Print Page**

System Data	CMiC
-------------	------

The Print option allows the user to print the currently displayed page.

# **Email Link**

System Data		CNEC
🗓 Contents 📓 Index 🔍 Search 💽 🥥 🕞 💷	Application 🕜 Corporate	CM/C

The Email Link option will create a new email with the current page's title as the subject line, and a link to the current page in the body of the email.

# Application and Company Specific Page – Customizable HTML Pages

System Data	
🔟 Contents 📓 Index 🔍 Search 💽 🕘 📑	Application Corporate

This option is customizable (likely with the help of someone in the IT department), and it can be used to display an internal, company generated help document, or any other type of document that is of an HTML format. Also, the displayed page could be customized to contain links to various company generated documents that relate to the current manual displayed by Help.

As an example, when displaying the help for the Accounts Payable module, the **Application** option (framed by the red rectangle) could be customized to display a company specific Corporate Policy page for Accounts Payable operations.

For each manual displayed by Help, the corresponding, customizable file that is displayed by clicking the **Application** option is found at the root of the HTMLHelp directory. The name of each of these customizable files is formatted as follows: {*application code*}MODULE.HTM. For instance, since the *application code* for Accounts Payable is *AP*, its customizable help file is *AP*MODULE.HTM, and since the *application code* for the System Data manual is *SD*, its customizable help file is *SD*MODULE.HTM.

**NOTE**: If there are no customizations made, the default page titled, Module Specific User Defined Help, will be displayed.

# Company Specific Page – Customizable HTML Page

System Data

The **Corporate** option, framed by the red rectangle above, displays one particular HTML file, regardless of what manual is being displayed by Help. Thus, this page should not be specific to a particular application. The name of this customizable HTML file is CORPORATE.HTM, and it is located in the same location as the other customizable files displayed by the **Application** option, which is at the root of the HTML Help directory.

The page displayed by this option could be customized to display a company specific document, or to display links to various documents.

# **CMiC Link**

System Data

Clicking on the CMiC Logo will open a new browser, and display the www.cmicglobal.ca home page.

Application @ Corporate CM/C

# **Forms Screens**

# **Screen Layout**

# **Console Regions: Treeview & Dynamic Content**

CMiC	Logged in as - DA		
ENTERPRISE V10X	NTERPRISE V10 WKF	RESOURCE PLANNER OM TEST Edit Mode	99/////////////////////////////////////
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<ul> <li>General Ledger</li> <li>Accounts Payable</li> </ul>		Job Costing - TESTV10_X Job Costing Logon	
Accounts Receivable     Fixed Assets     lob Costing		Default Company	Jser Extensions +
E Setup	selected		User Extension1
Set User Defaults (F) E Local Tables	application		User Extension3
⊞ Job			User Extension4
Transaction			User Extension5
Forecasting		User DA	User Extension6
E Report			User Extension7
Utilities			More Extensions
Subcontract Management		Default Company CCC CMiC Test Construction Company	
Job Billing     Work Order Billing		Job Security Group	elated Screens +
Change Management		Jafault Executive Query Configuration CMIC DELT CMIC Default Configuration	Related Screep 1
		Distance Executive Guery Community Contro Way	Related Screen 2
Purchase Order		Default Project of 661	Related Screen 3
Inventory     Equipment Costing			Related Screen 4
Preventive Maintainence	Treeview Region	Dynamic Content Region	Related Screen 5
Material Sales	Treeview Region		Related Screen 6
US Payroll			Related Screen 7
Human Resources		Create	Mara Polated
Imaging     WorkElow			more related
⊞ System		4	<b>_</b>
-		Enter Default Company Code	
		Record: 1/1 List of Valu <osc></osc>	

Sample display of Enterprise Console, showing selected application in Treeview Region (Path: Job Costing > Setup > Set User Defaults) and Forms application in Dynamic Content Region

The Treeview Region is used to launch the applications of Enterprise. The system is delivered with three different tree configurations to choose from, and it provides the functionality for creating custom, user specific Treeviews.

The Treeview is defined by nodes, which have a '+' or '-' symbol, followed by a folder icon. The '+' symbol means that the node is expandable, to reveal other nodes or an actual menu option for launching an application. If the node has a '-' symbol, it means it is collapsible, hiding any of its child nodes or menu options. The options given by the Treeview are dependent on a user's security rights, and it only shows applications for which the user has rights. For information regarding building Treeviews, please refer to the "Creating Tree Views" section of the System Data/Infrastructure Manual.

# Main Application - Menu Bar

С	0	Setup Job Trans	action Eorecasting Logs Query (	Report Utilities Custom Programs Window	
		Default Company		A	
H General Ledger		Local Tables			
H Accounts Payable		Lucal rables	<u>Control</u>		
Accounts Receivable		Global Tables	Enter Category	main application's Menu Bar	
Fixed Assets			Sotup Cotogony Pick List		
Job Costing	main application:	Exit 🔺	Setup Category Fick List		
🗆 Setup	Job Costing		<ul> <li>Setup Phase Segment</li> </ul>		
Set User Defaults (F)			Enter Phase		
E Local Tables		durin darim	Enter Dhana Turan		
		arop-aown	Enter Phase Types		
E Forecasting		menu	Phase Template		
			Create Budget Spread Rule		
E Report					
Utilities			Inter Branch Setup		
Subcontract Management			WBS Fields		
∃ lob Billing			Rid Information	Did March and Deserves	
Work Order Billing		1	Bid mornadon	Did vvoli/Lost Reasons	
Change Management		-	Disallow Override Limit Setup	Bid Competitors	
			Profit Plan Source Definition		
Purchase Order			- Log Scroop Configuration		
			Eug Screen Conliguration		
Equipment Costing					
Preventive Maintenance			Dumentia	Contrat Denian	
<ul> <li>Materials Management</li> </ul>			Dynamic	Content Region,	
Payroll (US)			displaying	g main application	
Payroll					_
Human Resources					-1
E-Time		4			
Employee Self Service					
H Dashboard Setup					
버 Imaging		Record: 1/1	<0	SC>	

Sample screenshot of a main application in the Dynamic Content Region, launched by clicking the main application text in the Treeview; Note: not all folders launch main applications, only those with a mouse over Hand Icon do

Once a main application (i.e. modules of Enterprise) is displayed in the Dynamic Content Region, the main application's menu bar (framed by the red rectangle in the screenshot above) is used to navigate to its sub-applications. Sub-applications can be selected from drop-down menus using the mouse, directional keys or standard keystrokes (e.g. Alt 'S' for selecting Setup).

Each main application has its own menu bar options, however, they all contain the 5 following **Standard Menu** options:

**NOTE**: Menu options found in-between Setup and Logs and these standard menu options will vary by application.

#### Setup

Setup allows you to 'set up' the maintenance screens for the module being accessed. The drop-down menu for Setup always contains the **Default Company**, **Local Tables** and **Global Tables** drop-down menu options. The **Default Company** option is where you set your working company for the application. **Local Tables** contains the maintenance screens required for the current main application, and **Global Tables** contains the maintenance screens relevant to all of the applications within Enterprise.

#### Logs

Logs consists of multiple screens designed to show key data within the application at a glance. The Log options supports multiple record display, entry and/or modification of logged records (comments, notes). The layout can also be configured by the user.

#### Query

Query contains all the application specific screens designed expressly for viewing the application data from different perspectives.

#### Reports

Reports contains multiple reports written specifically for the current main application.

#### Utilities

Utilities is where you will find screens that are not commonly accessed during routine operations. This option is reserved for use by your system administrator only.

#### **Custom Programs**

Custom Programs contains any screens that have been designed specifically for your company, and they are not part of the standard CMiC Enterprise product.

**NOTE**: As an individual user, you may or may not have access to all these menu options. Your access to the main applications of Enterprise (i.e. modules of Enterprise) depends on your job description and your User ID security rights. As you may notice, the Treeview Region only shows programs that you have access to, while the Standard Menus show all programs, with the options you do not have rights to being disabled.

# Sub-Application - Toolbar, Blocks & Status Bar



Sample display of the toolbar for a sub-application, framed by red rectangle, and its blocks (main application is General Ledger and displayed sub-application is Enter Transaction)

**NOTE**: In CMiC manuals, the terms screen and application (main application or sub-application) are used interchangeably, as are the terms block and section.

The sample of a sub-application (screen) in the screenshot above shows its toolbar, blocks (sections), and status bar. On the form (screen), blocks are labeled with dark blue text.

The status bar displays information about the current screen, such as what record is being displayed in the current set of records (e.g. Record: 1/9), and if a field has a pre-defined List of Values to choose from.

Each icon on the toolbar performs a specific task within the screen (sub-application). The function of each toolbar option is listed in the following table. Also, the icons are only in color when the cursor is over them.

lcon	Name	Usage	Function Key
ę.	Enter Query	Queries one or more existing records using the fields on the form. Use Execute Query toolbar option to execute the query.	F11
<b>9</b>	Execute Query	Launches query to return the data that matches your requested query parameters.	F12
	Save	Saves the data that you have entered.	F3
<u>I</u>	Exit	Exits the screen or exits the Query.	F4
Ú2	Count Hits	Indicates how many records will be returned based on the query parameters entered.	Shift F11
<b>₹</b>	Clear Field	Clears the data entered in a specific field. It is a quick way to do a backspace on a large field.	F6
]	Duplicate Field	Copies the value from the same field in the previous record to the specified field in the current record.	Shift F7
۵.	Clear Record	Clears all the data entered in the current record. Note: If the data has already been saved to the database this function only clears the screen, it does not remove the record from the database.	F5
	Duplicate Record	To duplicate a record, you must first use the Insert Record function. Then you can use this option to copy all of the fields from the previous record into the current record. This option is particularly useful when entering multiple records with similar data, such as invoices.	F7
-	Insert Record	Creates a new blank record that you can then complete as required.	Shift F6
	Delete Record	Deletes the record from the database, as well as from the screen.	Shift F5
±	List of Values	Displays a list of valid values for any field that has been pre- determined with a List of Values.	F9
Ł	Print to File	This function is an extension of Send to Spreadsheet. If utilized, a window will display requesting parameters for file creation.	
25	Print to Spreadsheet	Automatically creates a spreadsheet of the data displayed by a screen. See the " <u>Toolbar Options</u> " section of this guide for further details.	
È	Mail Merge	Advanced option, requiring configuration; Send the queried records into a Mail Merge Document.	

lcon	Name	Usage	Function Key
	Print Form Letter	Advanced option, requiring configuration; Print a form letter for the current data on the screen. The form-letter must have been previously defined.	
1	Edit Field/Record	Allows you to edit selected field/record.	
+	User Extension	Displays user extensions, which are added custom fields for records. Refer to the "User Extension" section of the System Data manual for further details.	
1	First Record	If you have queried data, this function will automatically take you to the top record.	
•	Previous Record	Displays the previously queried record. Note: refer to the "Record" section of the status bar to see what record the current one is in the set	Arrow UP
•	Next Record	Displays the next queried record. Note: refer to the "Record" section of the status bar to see what record the current one is in the set	Arrow Down
Ŧ	Last Record	If you have queried data, this function will automatically take you to the last queried record.	
	Previous Block	Moves cursor from the current section of a screen to the previous section.	Page Up
	Next Block	Moves cursor from the current section of a screen to the next section on the screen.	Page Down
Ů₽ <b>₽</b>	Check Spelling	Invokes installed spell checking software.	
?	Help	Invokes the application Help documentation. Refer to the Forms <u>Help</u> section of this guide for further details.	
-	Launch Workflow	Not a standard option; Deals with the workflows defined for the current application, block and row. Please refer to the Workflow manual for further details.	
<b>O</b>	Show Images	Not a standard option; Customizable, and user defined.	
R	Show Attachments	Not a standard option; Customizable, and user defined.	
2	Image Upload	Advanced Option; Attach an image associated with the current record. Refer to the Imaging manual for further details.	

# **Toolbars**

# **Menu Bar Options**

# About – Current Application and Database

Printing Options     List     Wenu Bar       From Company     CMiC Cor     QMiC Error Info     User Extension 1       To Company     ZZ     CMiC Cor     Debug	
From Company         ZZ         CMIC Cor         CMIC Error Info         User Extension1           To Company         ZZ         CMIC Cor         Debug         User Extension2	
To Company ZZ CMiC Cor Debug User Extension2	
Customer Pick List Processing Messages Edit Selection Criteria User Extension3	
Customer Class ALL All Custon Alerts About option User Extension5	
From Customer ZZ-ACME ZZ-Acme About User Extension6	
To Customer  10266 ZZ - Home Depot User Extension7	

About, under the **Help** option of the Menu Bar, will display information about the current screen, its database and the current version of CMiC Enterprise. It also has a button to list the current users on the database.

This function is particularly useful to retrieve information about the current application and version of Enterprise in the case you need to communicate with CMiC about the application.

🙀 About CMiC Software - TESTV10X							
CMiC Enterprise (win32common) (web)							
Program Description	AR Aged Report						
Program	ar1000 2004.00.0	)0					
Standard Filename	AR1000						
	File (on Disk) 🛛	\pdc2000\sys_	10%testv10_x%	ar1000.fm×			
F	ile (Date (Size)) 🛛	2010-Sep-0910	:04:00 (size 3	809,916)			
Block Name	B2						
Table Name							
ltem Name	C_FROM_COMP_	CODE					
User ID	MIKEFER1						
Database Name	TESTV10X (201)	2-Mar-23) Orac	le Database 11	l g Release 1	1.2.0.3.	0 - 64bit Prod	lucti
	Session ID <mark>19513</mark>	691	SID 86	Serial#	41493	Inst, 1	
Enterprise Level	CMiC Open Enter	prise V10_X - \	/10-X-020-2 P	atch Release	• 🔶	current	
Form-User License	CMiC Enterprise					version	
App Code	AR Active Ir	nst. 1 Clu	ster Inst. 0		User Li:	st <u>C</u> lose	1

# **Toolbar Options**

# Print to Spreadsheet 🚟

The Print to Spreadsheet option of a screen's Toolbar is used to print data displayed by a screen to a spreadsheet. The spreadsheet's column headers will be the titles of the fields, and the data will be beneath

the headers. The spreadsheet's file type is a CSV file, which can be opened by most spreadsheet applications.

To send the data displayed by a screen to a spreadsheet, click the Print to Spreadsheet option. Once the spreadsheet is created, a pop-up window will give you the option to open it for viewing, or to save it.

Depending on your web browser and its settings, if you choose to save it, the browser will either save it to its default downloads location, or it will display a pop-up window giving you the ability to rename the file and to choose where to save it.

# Mail Merge 🗎

This feature is advanced and requires configuration. Mail Merge allows you to embed fields from any CMiC Software screen into a word document. Using your standard word processor, you create a letter/notice (document) as a Merge Document. Then you can query for example, all Vendors within a specific area code and merge the selected fields (e.g. Vendor Name, Address, Contact ...) within your document.

# Print Form Letter 🇳

This Feature is advanced and requires configuration. It allows you to create form letters within Enterprise, based on virtually any screen. With this feature you can define documents with multiple sections and tables, where Mail Merge only allows one section. If you have a document defined for the data on the current screen, this icon will automatically create your form letter without you having to go to a Print Menu Option.

# User Extensions +

This is a non-standard option used for customer-specific customizations.

On certain screens, you will notice that the standard panel on the right of the screen that displays User Extensions and Related Screens is not available. The panel still exists, but due to the nature of data entry requirements, we needed to utilize this space for input fields. To access the side panel, activate this User Extension Icon.

# **Tabs and Data Fields**



# Tabs

For applications that deal with a large number of fields, related fields are grouped into tabs, as shown in the above screenshot.

# Data Fields – Types

As shown in the screenshot above, data fields that are light yellow are for display only, and white data fields are for both display and data entry.

# Drop-Down Lists and List of Values (LOV)

Data entry fields that are drop-down lists, as shown in the screenshot above, have a pre-defined list of values called **List of Values** (LOV). Drop-down data fields limit the data that can be entered for that field by forcing the user to choose one of the predefined values.

# **Navigation**

# **Field Navigation**

To move from one data entry field to the next, you can use the Tab or Enter keyboard keys, and to move to the previous data entry field, use the Shift and Tab keyboard keys together.

# **Block (Section) Navigation**

To move from block to block, forward, you can use the Page Down function key or the Next Section icon on the toolbar. This function will move you from the current section to the first enterable field of the next section. To move backwards, use the 'Page Up' function key or the Previous Section icon on the toolbar. This will move you from the current section to the first field of the previous section.

# **Record Navigation**

If there are multiple records, indicated by the "Record" section of the status bar, you can use the Next Record and Previous Record toolbar options to move from one record to another, or the Down Arrow and Up Arrow keyboard keys. If you are in the middle of a group of records and want to move to either the first or last record in the set, utilizing the First Record or Last Record icons on the toolbar (no corresponding function key, but you can utilize the Record menu, Alt-R keyboard keys together, which is along the top of the form).

# Screen Modes: Insert & Query (Data Query)

Screens have two operational modes, one is for entering data for a new record or to display and edit an existing record, and the other mode is for queries. The first mode is referred to as Insert Mode, and the second is referred to as Query Mode.

# **Insert Mode**

For nearly all applications, the screen will be in Insert Mode, and depending on the screen's use, it will be ready for you to enter data for a new record, or it will display an existing record(s) for viewing or editing. Accordingly, the Insert Mode is further broken down into an Entry Mode and an Edit/Display Mode. For most screens, they start in the mode in which they are most commonly used. For instance, Transaction Entry screens start in Entry Mode, while most maintenance screens start in the Edit/Display Mode and display existing records. If the screen is in Edit/Display Mode, you need to use the **Insert Record** icon (Shift-F6) to change it to Entry Mode.



# Query Mode (Data Query)

Sample of a screen in Query Mode; Query Mode Color is customizable and may be different for your system

When the screen is in Query Mode, the fields that can be queried will be colored in the Query Mode Color specified by your system's setup (Query Mode Color is customizable). Query Mode is for querying the

system for a record or a group of records that match specified parameters, specified in one or more of the record's fields.

To perform a query, the screen must be in Query Mode. If the screen is in Insert Mode, and if allowed by the current screen, you can change the mode to Query Mode by using the **Enter Query** toolbar option or the F11 function key. To exit Query Mode, use the F4 function key. In Query Mode, enter the query parameter(s) into the relevant field(s), or if a field has an associated List of Values (indicated in status bar area), you can select a query parameter from the list brought up by using the F9 function key or the **List of Values** toolbar option. Then use the **Execute Query** toolbar option or the F12 function key to have the system return the matched results, and to have the screen return to being in Insert Mode. The number of records returned for the result will be displayed by the "Record" section of the status bar, along the bottom of the form. If more than one record is returned, you can use the **Next Record** and **Previous Record** toolbar options to move from one record to another.

# **Table Sorting**

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Transactions									
Prepare Batch (F)			<b>Batch Deta</b>	il					Jser Extensions +
Enter Transaction (	F)								Liser Extension1
Print Edit List (F)			Batch Num	berBatch Date	Batch Name	Typ	ellser	Control Amount	User Extension
Accruais			2276	03/04/2011	Transfer won hid crainst				User Extension2
Recurring Entries		1	4025	12/20/2011	CDI Dick Monogoment	T	DAVI		User Extension3
Bank Transfers		1	4333	12/20/2011	CDI Risk Management		RAVI	.00	User Extension4
Allocate Cost Pools	(F)		4941	12/20/2011	CDI Risk Management		RAVI	.00	User Extension5
Allocate Interest (F			4943	12/20/2011	CDI Risk Management	T	RAVI	.00	Liser Extension8
Post Batch (F)	click column		4945	12/20/2011	CDI Risk Management	Т	RAVI	.00	
E Period End	beeden te eert it		4950	12/21/2011	CDI Risk Management	Т	RAVI	.00	User Extension/
H Document	header to sort it		5353	02/10/2012	CDI Risk Management	Т	SMUSER1	.00	More Extensions
Queries	by ascending		6566	07/11/2012	CDI Risk Management	T	RAVI	00	
Reports	order, and once		6500	07/12/2012	CDI Disk Management	T	INATIA 7	.00	alated Screene +
E Oullues	again to sort it by	1	0000	07/13/2012	ODI RISK Management	÷	INTIAZ	00.	
E Accounts Payable	descending order;		6600	07/13/2012	CDI Risk Management		IMHAZ	.00	GL Transaction Entry
E Accounts Receivable	sorted column		6687	07/31/2012	A/R Financial Charges	F	IMTIAZ	.00	Job Setup
E Fixed Assets	turns from blue to		6689	07/31/2012	A/R Financial Charges	F	RAVI	.00	Related Screen 3
Subcontract Management	green		6690	07/31/2012	A/R Financial Charges	F	RAVI	.00	Related Screen 4
	-		6693	07/31/2012	A/R Financial Charges	F	IMTIAZ	.00	Related Screen 5
E Work Order Billing									Delated Career C
E Change Management									Related Screen 6
Requisitions								1	Related Screen 7
Purchase Order							Select	Posted Batches	More Related
Equipment Costing		- F	<u>ا</u>			_			
Preventive Maintenance									
Materials Management		E	Record: 1/?			<0S	iC>		

For a table of records, its records can be sorted by any column that has a blue header. To sort the records by a particular column, click a column header once to sort them in ascending order, and once again to sort them in descending order. Once sorted, the column header will turn green, as shown in the above screenshot.

# **Advanced Searches**

This section details the use of more advanced searches, which use wildcards, relational (comparison) operators, and variables.

# Wildcards – Pattern Matching

Wildcards can be used in the search parameters entered into the fields to search against.

Action Edit Block Field Record Q	Query Utility Help Window		_		
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😨 Payroll - PRETESTV10X Employ	yee Profile Maintenance				
Employee Details					u
	searc	n parameter u	ising the		
Employee		ldcard		mployee	Employee 401K
Personal Company Rates/ Ad	ldress Tax HR Info HCM Security	Notes Exclu	Proje Di	ispa 🔳	Employee State SUI
					User Extension3
Last Name	First Name %son%	Initial			User Extension4
Prefix	Suffix	Alias			User Extension5
SSN/SIN No.	Туре	✓ Full/Part		-	User Extension6
Status	Work Status	- I <u>A</u> II	ow Accrued	Leave	User Extension7
FLSA Type	-				More Extensions

Sample screen in Forms, in which the "%" wildcard is used in a query

When entering a search parameter in a search/query field, wildcards can be used to create a pattern to match against the pattern of the corresponding field of the records. They are used when exact matches are not sufficient. There are two wildcards: one represents any *single character*, and the other represents any *string of characters*. They are used with regular characters to create a pattern, as a search parameter, and the pattern is used to match fields that follow the specified pattern.

#### Wildcard Characters

Single Character: "\_"

String of Characters: "%"

### **Example Patterns and Possible Matches**

Example Patterns	Possible Matches
JON_S	JONES, JONAS, JONOS, JON-SRA
JON%S	JONSTONES, JONES, JONAS
ENTER%	ENTER, ENTERS, ENTERTAIN
S_AR_	SHARE, SMART, SHARP, SNARE
S%AR_	SAMARTRA, SHARE, SMART

# **Query Mode**

In Forms, when the screen is in Query Mode, advanced searches (queries) can be achieved through search parameters that contain relational operators. Also, the Multi-Variable Search method can be used to create a search statement that will be used to match records against.

# **Relational Operators**

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Comp Code Vendor	Invoice #	Invoice Date	Post Date		Curr ivoice Amo		1 (	iser Extensio Iser Extensio Iser Extensio Iser Extensio Iser Extensio Iore Extensio	ภาร วท4 วท5 วท6 วท7 ons

Forms: sample of a query, with the screen in Query Mode, using a wildcard and a relational operator

Relational operators, along with wildcards, can also be used when exact matches are not sufficient. To create search parameters using relational operators, use the following table of relational operators and its examples for assistance:

Operator	Meaning	Example Search Parameter	Translation
=	Equal to	*just enter value to match, example: 1000	Return invoices with a balance of \$1000.00 even.
!=	Not equal to	!=1000	Return invoices with a balance that is NOT \$1000.00 even.
>	Greater than	>1000	Return invoices with a balance larger than \$1000.00
>=	Greater than or equal to	>=1000	Return invoices with a balance greater than or equal to \$1000.00
<	Less than	<1000	Return invoices with a balance less than \$1000.00
<=	Less than or equal to	<=1000	Return invoices with a balance less than or equal to \$1000.00
Between	Between two values	between 1000 and 2000	Return invoices with a balance between \$1000.00 and \$2000.00 (inclusive)

# **Date Formats**

For dates, use either the format DD-MON-YY (01-JAN-15) or DD/MON/YY (01/JAN/15).

# Multi-Variable Searches (Query/Where)



Sample of a screen in Query Mode, with 2 declared variables for the Invoice Date and Current Invoice Amount Fields

In Forms, complex searches can also be done through the Multi-Variable Search option, which uses variables to represent values of particular fields, and relational operators and connectives (and, or).

First, put the screen into Query Mode by using the Enter Query function key, F11, or its corresponding icon

from the toolbar (shown in screenshot above).

Next, declare the required variables in the relevant fields by entering the "&" symbol and a name for the variables, as shown in the above screenshot.

Then use the Execute Query function key, F12, or icon in (next to Enter Query icon) from the toolbar to bring up the **Query/Where** window, as shown in the screenshot below (application recognizes the use of variables and brings up the Query/Where window). Enter a query using the declared variables and relational operators, and using the "**and**" or "**or**" connectives to link each search parameter, as shown in the below screenshot.

NOTE: In the Query/Where pop-up window, dates must be between single quotes, like so: '1/JAN/15'



Sample of the Query/Where pop-up window with a created search statement

In the **Query/Where** pop-up window, shown in the screenshot above, is an example of a created search statement that contains 2 search parameters (each using a relational operator), and 1 connective:

#### **Search Parameters**

- 1. &DATE between '1/JAN/15' and '31/JUL/15'
- 2. &AMT > 1000

#### Connective

1. *and* 

After creating the search statement, click [OK] once to test the search statement (an error message will be displayed if there is an error), and once again to execute it and have the results retuned. If an error message is displayed, the search statement will be saved, and it can be edited once the Query/Where pop-up window is re-launched by the Execute Query function key (F12) or icon.

# Reports

All Enterprise modules that handle records have a **Reports** menu option that lists the module's reports. This section covers running reports for Forms screens.

# **Printing Reports**

Action Edit Block Eield Record Query Utility Help Window				
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🍘 Accounts Receivabl	e - TESTV10X 👘 Al	R Aged Report 🔨		
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Frinding Options				User Extensions +
From Company	ZZ	CMiC Construction Inc.		User Extension1
To Company	zz	CMiC Construction Inc.		User Extension2
Ourteren Disk List	[			User Extension3
Customer Pick List			Edit Sejection Uniteria	User Extension4
Customer Class				User Extension5
From Customer	4CASTER	MISSISSAUGA FORECASTING COMPANY		User Extension6
To Customer	BOWER	Bower Design		User Extension7
Job Pick List	JOBPKLST	Job Pick List	Edit Job Selection Criteria	More Extensions
From Job				
To Job				Related Screens +
Investore Contine Conte				Related Screen 1
Invoice Series Code				Trial Balance
Aging Date		List of Values		Related Screen 3
Cut off Date		Indicator: Indicates	click to bring up	Related Screen 4
Group by	Customer 👻	values for selection	Priting Options	Related Screen 5
			window	Related Screen 6
	Show invoice Det	ali I Include Deposits		Related Screen 7
	Show Memos and	d Checks	+	More Related
Show Net Zero Customer Accou Print				
Enter Invoice Series Co	de	×		
Record: 1/1	List	t of Valu <0SC>		

Forms: Sample of a printing options screen

After choosing a report from a module's **Reports** menu, a printing options screen will be displayed to enter the parameters for the report. These parameters are used to restrict the records that get printed on the report. As shown in the above screenshot, if a field has a List of Values to choose from, a List of Values indicator will be displayed on the status bar at the bottom of the form. Use the List of Values Icon or the F9 function key to bring up the list. After entering the parameters, click the [**Print**] button to bring up a Reporting Options window to choose the report's destination (preview, printer, email, file, fax) and its file format.

# Reporting

🧟 AP1600: (	Outstanding Vouchers by Job	
Print Server	testv10x	
Destination	E-Mail	•
Name [		
Format	PDF	-
Template	No Template	-
🔲 Schedule	le Layout Options	
	E-mail Run Report Cancel	

Sample of a Reporting Options window to select the report's destination and file format.

The Reporting Options window is used to select the report's file format, reporting option, and if desired, a future date for its automatic reporting. Before running the report, ensure its desired file format is selected in the **Format** field (format options vary for each reporting option). Then, use the **Destination** drop-down list to choose whether you wish to preview, print, email, create a file of, or fax the report. The fields of this window are explained in the table below, and each reporting option is detailed in the following "Reporting Options" section.

Field, Button, Flag	Description
Print Server	Name of the Print Server that you will be sending this report to. There is a list of values available.
Destination	Drop-down list to choose whether you wish to preview, print, email, create a file of, or fax the report. Each option is detailed below, under the "Reporting Options" section.
Name	Name of the printer that you will be sending the report to, if you chose <b>Printer</b> from the <b>Destination</b> drop-down list.
Format	Format to utilize when creating the report as a file. The options vary for different reports and options of the <b>Destination</b> drop-down list. The possible formats are: PDF, HTML, HTMLCSS, XLS (Tab-Delimited), CSV (Comma-Delimited), and RTF.
Template	Related to the use of MIP and allows the user to select the template to be used in producing the report.
Printer Set-up Button	Visible only when the <b>Printer</b> option is selected from <b>Destination</b> drop-down list; Launches window to select a printer for printing.
Layout Options	Brings up a window to select the background color for the row that displays the name for a type or category (e.g. types of fixed assets). Black or grey can be chosen to make the sections more distinguishable, or white can be chosen to save on printer toner.
Schedule	If checked, this window will display a section to schedule the reporting of the report at a later time. An option is also available to automatically create and report the report at regular intervals. This option is detailed in the following section.
Wait For Completion	If checked, you accept to wait, until the report is generated and sent to the printer.

🙀 AP1600: Outstanding Vouchers by Job
Print Server testv10x
Destination E-Mail
Name
Format PDF
Template N T
check to display
Schedule Options Delow
E-mail Run Report Cancel
Start
C Immediately
⊙ <u>At</u> 1 H 00 M p.m. ▼
On 17/AUG/2015(Monday)
,
Repeat
C Do not repeat
© Every 7 Dav(s)
Scheduling Options Schedule Report In Database

# Schedule Reporting for Later Time or Regular Intervals

Sample: report scheduled for automatic creation and emailing at 1 PM, starting Aug. 17, 2015, and every 7 days afterwards

If you wish to schedule the reporting of a report, as specified by the parameters in the printing options screen, for a later time or regular intervals, check the **Schedule** check-box to display the **Start** and **Repeat** sections for its scheduling. The **Start** section is used to schedule the time and date the report is to be reported, as specified by the **Destination** field. If **Do not repeat** is selected in the **Repeat** section, it will only be reported once.

If you want the system to automatically create and report the report at regular intervals, select the **At** option in the **Start** section, and specify the time and date for when the automatic reporting is to begin. In the **Repeat** section, select **Every** and specify the number of minutes, hours, days or months for the interval. This schedules the report for automatic creation and reporting at regular intervals, as specified, beginning from the time and date specified in the **Start** section.

To complete the scheduling, use the [**Run Report**] button, and the report will be automatically created and reported as specified.

# **Reporting Options**

#### **Printer: Print Report to Paper**

Select **Printer** from the **Destination** field of the Reporting Options window, and use the **[Run Report]** option to print the report using the printer specified by the **Name** field.

#### **Preview: Preview Report**

Select the **Preview** option from the **Destination** field of the Reporting Options window, and use the **[Run Report]** option. The report will be displayed in a new browser window.

#### Preview with Cold Storage: Preview Report Using Cold Storage Software

This option is only available if the third-party software, Cold Storage Software, has been purchased and integrated with Enterprise.

Select **Preview with Cold Storage** from the **Destination** drop-down list of the Reporting Options window. In the window that pops up, select the document type, and edit the description fields as preferred. Use the [**Close**] button to close the window, and then use the [**Run Report**] button to preview the report through Cold Storage.

#### Local File: Create File of Report on Computer

This option is used to create a PDF file of the report on your local computer, or any computer in your network. After selecting **Local File** from the **Destination** drop-down list, use the [**Browse**] button. In the pop-up, enter a name for the report file (file type will be PDF), navigate to a location to save it, and click [**Save**].

#### File: Create File in Print Servers Working Directory

Instead of printing the report to paper, this option allows you to create a file in the print servers working directory, using the file format specified by the **Format** field.

#### E-Mail: E-Mail Report

🔞 E-mail I	nformation	ĸ
From	mike.fernandes@cmic.caClose	
То	joe.sual@cmic.ca	
Cc		
Subject	AR Detailed Aged Report	
Text	Please review the attached Aged Report	]
More >>		

Select **E-Mail** from the **Destination** drop-down list of the Reporting Options window, and the above window will pop up for you to enter in the e-mail information. The **From** field will automatically be set to the user's e-mail address. To enter more than one address, use a comma or colon as a separator.

Use the [**Close**] button to close the window, and in the Reporting Option window, use the [**Run Report**] button to create and send the report via e-mail. Use the [**E-mail**] button to return to the E-mail Information screen for editing.

In Project Management, there is also a flag to include the attached Documents for the item in use (e.g. Issue, Communication). Check the flag to include the particular documents to be included in the Email as attachments.

### Fax: Fax Report

Select **Fax** from the **Destination** drop-down list to bring up the Faxing Information screen. If a cover page is necessary for the fax, enter its text into the **Cover Page Text** area. Enter the fax number(s) or use the **F9** function key to bring up a list of contact fax numbers for selection. Use the **Tab** key to move between the fields, as this triggers automatic formatting. Optionally, enter the recipients'

names and company. Finally, choose your system's faxing software and use the [**Close**] button. Back in the Reporting Options window, use the [**Run Report**] button to create and fax the report.

#### Cold Storage: Send Report to Cold Storage

This option is only available if the third-party software, Cold Storage Software, has been purchased and integrated with Enterprise.

Select **Cold Storage** from the **Destination** drop-down list of the Reporting Options window. In the window that pops up, select the document type, and edit the description fields as preferred. Use the [**Close**] button to close the window, and use the [**Run Report**] button to create and send the report to the configured Cold Storage destination.

lelp		
с <u>—</u>	Action Edit Block Eield Record Query Utility Help Window Solution Solutio	F1 64 49 E
General Ledger     Accounts Payable     Accounts Receivable	Bystem Tables Maintenance - TESTV10_X     System Options	
	General   Database O   Reports   Finan   Pr display Error Human. E-Tim   •• Use	Extensions +
Subcontract Management     Job Billing     Work Order Billing     Change Management	Progress Bar for file transfer     OMIC Error Info     Subject Line Appears In Notes Entry     OP Rep     Subject Line Appears In Notes Entry	ttension 2 U ttension 3
Change Management     Requisitions     Purchase Order	Processing Messages     ch to Direct Tax     Use     Alerts	rtension 4 er Extension 5 er Extension 6
Equipment Costing     Preventive Maintenance	ASCII Import CTL File Path (\vector2000\sys_10\testv1 About bout bout bout bout bout bout bout	er Extension 7 re Extensions

Forms: Help in Main Menu and on toolbar

In Forms, Help can be accessed from the screen's Main Menu, as well as the Help Icon located on the Toolbar. When the Help option is clicked, a new browser window will be launched for the Help application.

System Data Contents Index Search	ee a =	of manual, corresponding to a module of Enterprise
Contents System Calling Overview - System Data Overview - System Data System Calling Over Characters Security Ware Extensions Ware Extensions Ward Customizing CNC Ware Data Motes Global Functions Global Tables	contents, index, and searches related to current manual	Your Are Here: System Data System Options Related Information: General Tab Database Options Tab Poptions Tab Poptions Tab Poptions Tab Poption Tab Pop

Sample of the Help screen

This will open a version of the 'User's Reference Manual' for the current application and allow you to navigate within the loaded manual. Above is a sample of a standard help screen for Enterprise's System Data module.

The side panel displays the contents of Help for this particular module. A folder can be opened by clicking it, and a folder's contents can be displayed by clicking on a page icon. The manual's text and links to its sub-sections will display in the larger panel. The Previous and Next icons along the top-left of the screen, next to the red rectangle in the screenshot above, can be used to move through the sections of the manual.

# Contents

System Data	Application @ Corport	ite CM/C
Contents ×	Your Are Here: System Data	
CSystem Data		

Clicking the Contents page will redisplay the Table of Contents for the current manual. This might be necessary after having used the Index or Search options and needing to view the manual's Contents again.

### Index

System Data		plication @ Corporate
Index ×	Your Are Here: System Data	
Add New Fields to an (Existing) Extensic	Overview – System Data	

This option will display the manual's Index. Note that a **Look For** option appears to filter the Index as needed.

# Search

System Data			<b>Application</b>	Corporate CM/C
Search ×	I dis fenerana Dillina	2		^
Search for tree view Go	Record: 1/1	<0SC>		
Highlight search hits     Greating Tree Views     bold	The CMiC Enterprise Software create your own Tree Views. T	is shipped with a default tree view wh he CMiC Tree View (CMIC_TRD) ca	iich can be used as is or you ca nnot be modified.	m use it as a basis to
Tree View Editing Command Options UE Table Maintenance	When creating a new menu ther duplicate an existing menu, ma	re are two choices, you may start from ke sure the cursor is on the menu code	scratch or duplicate an existing to be duplicated then press the	ıg menu. To e [ <b>Duplicate</b> ]

The Search option is for searching the current manual for particular words.

As shown in the screenshot above, the words entered for the search can be highlighted in the display region by clicking the **Highlight search hits** check box. By default, the flag is checked, however users may uncheck the flag that will highlight on the page the actual words matching the search term.

Additionally, the page selected from the Search results, as shown above, will be shown in bold.

# **Next Page/Previous Page**

System Data		CMIC
🕼 Contents 📓 Index 🔍 Search 💽 🕘 🗐	Application Corporate	

These options allow the user to navigate through the Help on a page by page basis. Next will display the next page, with respect to the page currently displayed, and Previous will display the previous page.

# **Print Page**

System Data	
Contents Index Q Search 🕑 🕢	Corporate CIVIC

The Print option allows the user to print the currently displayed page.

# **Email Link**

System Data		CNEC
🗓 Contents 📓 Index 🔍 Search 💽 🥥 🕞 💷	Application 🕜 Corporate	CM/C

The Email Link option will create a new email with the current page's title as the subject line, and a link to the current page in the body of the email.

# Application and Company Specific Page – Customizable HTML Pages

System Data	
🗓 Contents 📓 Index 🔍 Search 💽 🕘 📑 🖃	Application Corporate CIVI/C

This option is customizable (likely with the help of someone in the IT department), and it can be used to display an internal, company generated help document, or any other type of document that is of an HTML format. Also, the displayed page could be customized to contain links to various company generated documents that relate to the current manual displayed by Help.

As an example, when displaying the help for the Accounts Payable module, the **Application** option (framed by the red rectangle) could be customized to display a company specific Corporate Policy page for Accounts Payable operations.

For each manual displayed by Help, the corresponding, customizable file that is displayed by clicking the **Application** option is found at the root of the HTMLHelp directory. The name of each of these customizable files is formatted as follows: {*application code*}MODULE.HTM. For instance, since the *application code* for Accounts Payable is *AP*, its customizable help file is *AP*MODULE.HTM, and since the *application code* for the System Data manual is *SD*, its customizable help file is *SD*MODULE.HTM.

**NOTE**: If there are no customizations made, the default page titled, Module Specific User Defined Help, will be displayed.

# Company Specific Page – Customizable HTML Page

System Data

The **Corporate** option, framed by the red rectangle above, displays one particular HTML file, regardless of what manual is being displayed by Help. Thus, this page should not be specific to a particular application. The name of this customizable HTML file is CORPORATE.HTM, and it is located in the same location as the other customizable files displayed by the **Application** option, which is at the root of the HTML Help directory.

The page displayed by this option could be customized to display a company specific document, or to display links to various documents.

# **CMiC Link**

System Data

Clicking on the CMiC Logo will open a new browser, and display the <u>www.cmicglobal.ca</u> home page.

Application @ Corporate CM/C

# **JSP Screens**

# **Overview – JSP**

JSP screens (JavaServer Pages) are screens created using Oracle's JSP framework.

# **JSP Security**

Project Management Menu				User Main	tenance			
n Go	User ID	First Name	Last Name	Contact Code	Enternrise Lleer	I DAP Name	Collab Liser	Action
Project: Project 1000 With Job Series 1000 (	1044217	Antonio333	Banderas333	AB003	AZU0004	Default	N	S X
Communication Management	1044221	Daniel	Rock	DR		Default	N	S X
Document Management	23092016	Betty	Kirkpatrick	BKI	23092016	Default	Y	S ×
Bid Management	A10RG	ORG	MAN	OM		Default	N	Si 🗙
Budget & Cost Management	AA1	AI	Fidler	AA		Default	N	<b>⊠x</b>
Site Management	AAAZZZ	Andreis	ZU	AZ		Default	N	S ×
Liser-Defined Loos	AB	Anand	Badinger	AB	AB	Default	N	S 🛛
User-Defined Logs     Defined Logs     Defined Logs	ACHAMPION	A	Champion	AC	ACHAMPION	Default	N	S 🛛
C Security	ADAMH	Adam	Halkovic	AH		Default	Y	🖾 🗙
Partners	ADITI	Aditi	Goel	AG	ADITI	Default	N	🖾 🗙
Contacts	ADITI1	Aditi	Goel AG	AG		Default	Y	🛯 🗙
User Maintenance	AK	Asad	Khan	AK		Default	Y	Si 🗙
Change User LDAP Server	AKHAN	Asad	Khan	AK	AKHAN	Default	N	🛯 🗙
Role Maintenance	ALBERTP	Albert	Parks	AP		Default	N	🛯 🗙
Project Roles	ALEX-TESTING1	Alex	Zamberg	AZA	ALEX-TESTING1	Default	N	🛯 🗙
License Pools	ALEX1	Alexandr	Li	AL	ALEX1	Default	Y	Si 🗙
Subcontractor Reviews	ALEX2	Alex	Li	ALI	ALEX2	Default	N	😒 🗙
			ADE	Δ.Δ.		Default	Ν	X 622

Sample of JSP module and its Security menu.

All JSP modules and their screens use JSP Security Roles, which can only be set up in JSP modules, whereas, all ADF and Forms screens use ADF/Forms Security Roles. JSP security is completely separate from ADF and Forms security, and is managed via the **Security** Treeview menu in the relevant JSP Module, as shown above. Note, JSP security cannot be set up using the **Security** Treeview menu for ADF and Forms screens.

All JSP modules (e.g. xProjects, ESS, HCM, Scheduling 2.0 and E-Time) and their screens have their own JSP security setups, which are unique to them, as per the following example:

Employee Self Service						🖓 🗈 🍙 Logout
		Secu	rity Role	5		A
Search Go						Add A New Role
	Role Code	Role Name	Admin	Actions	Assign 🔶	
Employee Self Service	*ALL*	*ALL*			Choose your action[	
Payment Administration	ALMASTER	Andy Role	Y	😒 🗙	Choose your action[	
E Corporate Learning	AMICHAEL	AMICHAEL	N	😒 🗙	Choose your action[	
Recruiting	BALRAJS	Balraj S Role	Y	😒 🗙	Choose your action[	
Corporate Information	CCCMASTER	CCC Master Role	Y	😒 🗙	Choose your action	
User Maintenance	CHECKPRIV	test	Ν	🖄 🗙	Choose your action	
Role Maintenance	COLLAB	JDCollab	N	S 🔀	Choose your action[	
User Access	CXCSUBS	CXC's Subcontractor	Ν	S 🗙	Choose your action	
	CXROLE	Cindy's Role	Y	Si 🗙	Choose your action	
	DM_MASTER	DM Master	Y	🖄 🗙	Choose your action	
	E-MASTER	E-time Role Master	Y	🛯 🗙	Choose your action	
	ESS-ADMIN	ESS Administrator - Full Acces	Y	😒 🗙	Choose your action[	
	ESSBASIC	ESS Basic	N	🛯 🗙	Choose your action[ =	
	ETIME-ENTR	ETime Entry(Employee)	N	X	Choose your action	

Sample of JSP Role Maintenance screen in ESS module, which is the only JSP Role Maintenance screen in any JSP module with settings relevant to the ESS module (i.e., JSP Role Maintenance screens in other JSP modules <u>cannot</u> be used).

JSP Security Roles are used to grant privileges for JSP based screens. For the ESS module, which is JSP based, JSP Security Roles are used to set which screens are available to users.

In the JSP Security Roles screen of the <u>ESS module</u>, the Assign Menu Items action, framed below, is used to set which screens are available to ESS users:

DM_MASTER	DM Master	Y	Si 🗙	Choose your action
E-MASTER	E-time Role Master	Y	🖾 🗙	Choose your action
ESS-ADMIN	ESS Administrator - Full Acces	Y	🖾 🗙	Choose your action 💌
ESSBASIC	ESS Basic	Ν	🖾 🗙	Choose your action
ETIME-ENTR	ETime Entry(Employee)	Ν	🛯 🗙	Assign Users
EVERYTHING	Everything Admin	Y	🖾 🗙	Assign Programs
EXTUSER1	External User Only - Do NOT Mo	Ν	🛯 🗙	Assign Menu Items
FAR_MASTER	HR Master (JSP)	Y	🛯 🗙	Assign Privileges
HCM_ADMIN	HR Administrator	Ν	🛯 🗙	Assign Field Security
HRMARJROLE	MARJ HRADMIN	Y	Si 🗙	Choose your action 💌

To set up JSP Security Roles for the ESS module, the JSP Security Roles maintenance screen in the ESS module must be used, as <u>only</u> it has settings for the ESS module.

# **Reports**

All Enterprise modules that handle records have a **Reports** menu option that lists the module's reports. This section covers the running of reports for JSP based screens.

# **Printing Reports**

Contract Listing Report				Print Report 🛛 🖓 🗈 🍙
🗘 🗉 🗉 🛛 Project Management Menu			Contract Listing Report	
Search Go	From Job	Museum Exhibition Center	<b>A</b>	Print Report option
	To Job	ADRUNSC1	drop-down lists with List of	on Main Toolbar
Project: Navy Pier Refurbishment (ZZ-NAV	From Request Id		<ul> <li>Values for selection</li> </ul>	
Document Management	To Request Id		<b>A</b>	
Subcontractor Prequalification     Definition	From Vendor	ABS Contractors Ltd	A	
Budget & Cost Management	To Vendor	ZZ - Home Depot	A	
🗈 🛄 Site Management 🖃 🚰 Reports	From Contract	Security fence around construction	<b>A</b>	
Project Reports	To Contract	Excavating	A	
Project Distribution List Report	Sort By	Job 💌		
Project Contact List Report     Communication Reports	Posting Criteria	Posted 💌		
Document Reports	Contract Status	Open 💌		
		Include Voided Subcontracts		
Change Items				
Owner Change Order Report				
Contract Listing Report				

Enterprise Console: Sample of a JSP based printing options screen

Above is a screenshot of a particular JSP based printing options screen, after choosing a report from a module's **Reports** menu. Printing options screens contain drop-down lists with preloaded values (List of Values) and other entry fields to set the parameters for restricting the records that get printed on the report.

After selecting the parameters, click the **Print Report** option on the Main Toolbar, as shown in the above screenshot.

**NOTE**: Ensure your web browser is set to allow pop-ups for the server running CMiC Enterprise, as reports are displayed on new browser tabs.

# Reporting

🕹 Contract Listing Report - Mozill 💷 💷 💌				
♂ test4v10				
Report Config				
Print Server	testv10x 💌			
Destination	Preview 💌			
Name	dell5350dn 💌			
Format	PDF 🗨			
Run Report Close				

Sample of a Reporting Configuration window to select the report's destination and file format.

The Reporting Configuration window is used to select the report's file format and reporting option. Select the file format using the **Format** field, and use the **Destination** drop-down list to choose the reporting option, such as: preview, print, email, send to Cold Storage, or fax. The fields of the Report Configuration window are explained in the table below, and each reporting option is detailed in the following "Reporting Options" section.

Field/Button/Flag	Description
Print Server	Name of the Print Server that you will be sending this report to. There is a list of values available.
Destination	Drop-down list to choose whether you wish to preview, print, email, create a file of, or fax the report. Each option is detailed below, under the "Reporting Options" section.
Name	Name of the printer that you will be sending the report to, if you chose <b>Printer</b> from the <b>Destination</b> drop-down list.
Format	Format to utilize when creating the report as a file. The options vary for different reports and options of the <b>Destination</b> drop-down list. The possible formats are: PDF, HTML, HTMLCSS, XLS (Tab-Delimited), CSV (Comma-Delimited), and RTF.

# **Reporting Options**

#### Preview: Preview, Print or Save Report

Select **Preview** from the **Destination** field, and use the **[Run Report]** button. The report will be displayed on a new browser window. The browser window displaying the report can also be used to print or save (download) the report to a desired location.

#### Preview with Cold Storage: Preview Report Using Cold Storage Software

This option is only available if the third-party software, Cold Storage Software, has been purchased and integrated with Enterprise.

Select **Preview with Cold Storage** from the **Destination** drop-down list. In the window that pops up, select the document type, and edit the description fields as preferred. Use the [**Send**] button to create and preview the report through Cold Storage.

#### **Printer: Print Report**

Select **Printer** from the **Destination** field, and use the **[Run Report]** option to print the report using the printer specified by the **Name** field in the Report Configuration window.

# E-Mail: Email Report

😻 Email Information - Mozilla Firefox	C. marche				- C X	
3						
			Check Spelling	Back	Send	
	Email Infor	mation	indicates Lis	t of Value	s available	
From	mike.fernandes@cmic.ca				+	4
То					A	
	mike.fernandes@cmic.ca					,
cc						
						4
BCC						
Subject						-
Mossage						
Message						
Report File Name	PM1200.pdf					
Attachments						
Document Nar	Document Name		File Name			

Select **E-Mail** from the **Destination** drop-down list of the Reporting Options window, and the above window will pop up for you to enter in the e-mail information, and edit the report's file name, if desired. The **From** field will automatically be set to the user's e-mail address. To enter more than one address, use a comma or colon as a separator. Finally, click [**Send**] to send the report via e-mail.

#### Fax: Fax Report

Select **Fax** from the **Destination** drop-down list to bring up the Faxing Information screen. If necessary, enter a subject and message for the fax's cover page. Under the **Action** column of the **Recipients** section, click the following icon:  $\clubsuit$ , to create a row to enter a recipient's name, company and fax number. Finally, choose your system's faxing software using the **Fax Software** drop-down list and use the [**Send**] button along the top-right of the window to send it.

#### Cold Storage: Send Report to Cold Storage

This option is only available if the third-party software, Cold Storage Software, has been purchased and integrated with Enterprise.

Select **Cold Storage** from the **Destination** drop-down list. In the window that pops up, select the document type, and edit the description fields as preferred. Use the [**Close**] button to close the window, and use the [**Send**] button to create and send the report to the configured Cold Storage destination.
# Index

## A

ADF, Forms & JSP Screens	6
Advanced Search Mode	
Advanced Searches	
	·····- ,-

## B

BI Catalog Builder	
BI Dashboard Builder	10
Block Toolbar Options	
- <b>I</b>	

## С

CMiC Logs	34
CMiC Logs & Oueries	34
CMiC Queries	
CMiC Software Environment	
Console Regions: Treeview & Dynamic Content	20, 43
Customizing Enterprise Console	

## D

Data Fields - Types5	50
Development Tools	2

## F

Form Mode	29
H	

#### Ι

ert Mode	51

### J

### L

Lite Editor	
Log Builder	
Login	

#### M

Main Application - Menu Bar	44
Main Toolbar Options	21
Menu Bar Options	
-	

# N

Navigation	
8	

#### 0

Overview	. 4
Overview - Getting Started	. 1
Overview - JSP	64

# P

Printing Reports	39, 57, 66
Process Builder	

# Q

Query by Example	
Query Mode	
Ouerv Mode (Data Ouerv)	

# R

Reporting	
Reports	

## S

Screen Layout	20, 43
Screen Modes: Insert & Query (Data Query)	51
Screen Modes: Table & Form Modes	28
Search	31
Searches, Table Filters & Sorts	30
Software V10	2
Sorting Displayed Records	32
Sub-Application - Toolbar, Blocks & Status Bar	45

## T

Table Mode	29
Table Sorting	52
Tabs	50
Tabs and Data Fields	28, 50
Toolbar Options	48
Toolbars	48
Toolbars & Blocks	21
Treeview Builder	12

# U

JI Console
------------

### W

Wildcards - Pattern Matching
------------------------------