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User Reference

# CMiC IO

By CMiC

**CMiC**  
*Computer Methods*  
*international Corp.*

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# CMiC I/O

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## I/O Overview

CMiC I/O is an application that complements the CMiC Collaboration Suite. CMiC I/O allows both internal and external collaborators to utilize email to do selective data entry into the CMiC Project Management system. This allows users to create or add notes and attachments to Issues, RFI's and Communication Records without having to log into the Collaboration Suite from the internet or Local/Wide Area Network.

CMiC I/O allows collaborators the freedom of being able to communicate on key objects without having to be tied to the network. The collaborator can create and upload *attachments* and perform *off-line data* entry by simply using email client software.

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## Required Setup

### Technical

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You must create an IMAP email account for CMiC IO. This account needs to have three unique folders; CMiC suggests they be named Inbox, Processed and Errors.

Arrange with CMiC to enable the CMiC I/O services once all the setup has been done.

### System Options

---

On the system options screen within enterprise there must be a server that is defined as an IMAP server and one that is defined as an SMTP server. This can be the same server.

Action Edit Block Field Record Query Utility Help Window

System Tables Maintenance - TESTV10X System Options

### System Options

General Database Opti... Reports Financials Projects Assets Payroll Human Resour... E-TimeSheet Logo Path

☒ Progress Bar for file transfer  
☒ Subject Line Appears In Notes Entry  
☐ Enable Limited Security

☐ Keep Import History  
☐ Synchronous JSP Reports  
☐ Automatic Switch to Direct Tax

### Web Servers

Server Name or IP Address	Port	Username	Server Type											
			Web SMTP	Spell Forms	Disco-Check verer	Remote Proxy Collab	Brava	IMAP	RTI IMAP	Live Jasper Cycle	Dash-board			
cmicex01.cmic.ca			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
cmicex01.cmic.ca		cmiciotestv10_x	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
custom2008a.cmic.ca	389	cn=orcladmin,cn=Users,dc=cm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
http://cmiccollab1.cmic.ca/cmicipubliccn			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Default Notification Email

Last Upgrade Date: 07/AUG/2013 Upgrade Code: V10-X-009

Last Upgrade Description: CMiC Open Enterprise V10\_X - V10-X-009 Release

[LDAP Servers](#)
[Web Servers](#)
[Job Queues](#)
[Alert Settings](#)
[Upgrade History](#)
[Login Info](#)

Record: 2/?

System Options > Web Servers popup

The IMAP server entry must contain the username and password of the IMAP email account. The IMAP server is used to process incoming CMiC I/O emails and the SMTP server is used to send CMiC I/O emails.

## CMiC I/O Parameters

CMiC I/O Parameters

Email Folders

Incoming: INBOX

Successfully Processed: PROCESSED

Errors: ERRORS

Field Name Terminator: Field Value Delimiter: " Session Timeout: 180 Expunge

Dummy Email Field Name: END

Sender Email Address: cmiciotestv10\_x@cmic.ca Personal Name: CMiC I/O TestV10\_x

Send Error To Sender Validate Incoming Email Address

Options Exclusions Exceptions Miscellaneous

Error Recipients

Email Address	Personal Name
david.arrowsmith@cmic.ca	David Arrowsmith TESTV10_X
Stephanie.Bromfield@cmic.ca	Stephanie Bromfield TESTV10_X

Email Address Separators

Email Address	Personal Name
cmiciodev2006@cmic.ca	CMiC I/O Dev2006
cmicio@mydomain.com	CMiC I/O
blackberry@blackberry.com	---original message---
webmail@webmail.com	--- original message ---

User Extensions

User Extension1

User Extension2

User Extension3

User Extension4

User Extension5

User Extension6

User Extension7

More Extensions ...

Related Screens

SD Main Men

Related Screen 2

Related Screen 3

Related Screen 4

Related Screen 5

Related Screen 6

Related Screen 7

More Related ...

Enter Incoming Email IMAP Folder From Where Emails Are Read To Be Processed

Record: 1/1 ... <OSC>

Pgm: System Data – SYCMICIO - Configure CMiC I/O Parameters

Within the Enterprise system there are two items that need to be defined. The first is on the System Options > Setup Menu called 'CMiC I/O'.

The program is used to define locations and functions used by CMiC I/O.

### Email Folders:

CMiC I/O needs to have three email folders defined. These folders must be unique.

**Incoming** emails, this is where the system will look to find CMiC I/O related emails that need to be processed.

**Processed** emails, this folder is there incoming emails are moved to once the email has been processed. This means that any email in this folder has successfully been translated into data within CMiC.

**Errors** email, if an email fails processing for any reason, it will be moved into this folder. Emails in this folder have not been translated into data within CMiC.

### Email Settings:

**Field Name Terminator**, the value in this field indicates which character indicates the end of a 'Field Name' within the body of an email. This is by default set to a colon and currently cannot be changed.

**Field Value Delimiter**, this value is used to indicate the start and end of special characters within the body of the email. This is by default set to double quotes and currently cannot be changed.

**Session Timeout**, this field indicates how long a CMiC I/O web service processing session can run without timing out. This number is in minutes.

**Expunge**, this field indicates that messages in the Incoming email folder will be deleted when they have been processed. By default this field is set to checked, and currently cannot be updated.

**Dummy Email Field Name**, the value in this field is used to determine the end of an email body.

**Sender Email Address**, this field is the email address that will be used when sending email messages from CMiC I/O

**Sender Personal Name**, this is the name that will be associated with the Sender Email Address enter in the previous field (the 'From' name).

**Send Error to Sender**, if this field is checked, then the system will send email replies with the error message back to the sender if unchecked the sender will not receive error messages.



*Sample Email Sent back to Sender*

The error detected will be described in the body of the email, while the original email is included as an attachment so that it reviewed.

**Validate Incoming Email Address**: when checked, the incoming e-mail address is validated against the contact associated with the Unique ID in the subject line of the e-mail.

## OPTIONS tab

---

### Error Recipients:

CMiC I/O allows multiple people to receive emails regarding errors generated by CMiC I/O processing.

**Email Address**, this is where the error email will be sent, **Personal Name** is the 'To' in the email.

### Email Address Separators:

This section of the screen should be used to enter the different types of message separators used by different email sources to distinguish between the original message and the replies.

**Email Address**, this value should include the email server type, the **Personal Name** field in this case should be the separator used by the email server type.

## EXCLUSIONS tab

This tab is used to specify text patterns that would make CMiC I/O ignore the email if it is found in the e-mail subject – such as 'Out of Office' replies. Wildcards like '%' and '\_' are allowed.

Attachment names can also be specified. Those specified will not be processed by CMiC I/O if found as attachments to an email.



## EXCEPTIONS tab

This tab allows the user to define the email addresses that are to be excluded from validation when the flag **Validate Incoming Email Address** is set ON.

## MISCELLANEOUS tab

### Re-Open Closed Issues

When checked, a Closed Issue will be re-opened upon receiving a new note or attachment via CMiC I/O, provided the sender has the PM JSP Project Role privilege to **"Add Notes/Attachments to Closed Issues"**.

## Project Setup

The screenshot shows the 'Project Maintenance' window with the 'Defaults' tab selected. The 'Company' section shows 'ZZ' and 'CMiC ZZ Construction Company'. The 'Projects' section shows 'Project 00771605' and 'First Union Commercial Center'. The 'Meeting Footnote' text area contains: 'All items noted above will be deemed true and accurate if the readers do not express their objections within the next seven days.' The 'Punchlist Completion Period' is 0 days and 'Default RFI Review Period' is 0 days. The 'RFI Contact' is 'ZZ' with 'CM' as the contact code and 'Computer Methods' as the name. The 'Submittal Contact' is 'ZZ' with 'SW' as the contact code and 'Suzette Watson' as the name. The 'Submittal Lead Times in Days' section includes fields for Delivery (0), Fabrication (0), Float (0), Approval (0), Review (0), and Preparation (0). The 'Change Item Entry Mode' is set to 'Amounts'. At the bottom, there are buttons for 'Notes', 'Attachments', 'Documents', and 'Collaboration'. On the right side, there are sections for 'User Extensions' (listing User Extension2 through User Extension7 and 'More Extensions ...') and 'Related Screens' (listing Related Screen 2 through Related Screen 7 and 'More Related ...').

### PM Project Entry Form – Defaults Tab

Within the PM system each project that is to be used with CMiC I/O should have a default RFI Contact defined.

The default RFI contact defined on the project maintenance default tab will be the 'To' person when a new CMiC Object (RFI, Communication or Issue) is created via CMiC I/O.

If there is no default RFI contact defined on the project then the objects will be created with a 'To' contact.

## Project Contact Setup

The screenshot displays the CMiC Contact Maintenance interface. On the left is a 'Project Management Menu' with a search bar and a tree view of project-related functions. The main area is titled 'Contact Maintenance' and features a 'User Profile' tab for 'David Arrowsmith'. The profile includes fields for personal and professional information, contact details, and project-specific data. The 'Project Contact ID' field is highlighted in red.

User Profile		E-mail Notifications	
Company	CMiC Test Construction Co	Contact Code	DA
First Name	David	Last Name	Arrowsmith
E-Mail	david@cmic.ca	Initial	
Title		Suffix	
PM Role	MNGR	Position	
Project Contact ID	DEFAULTDAVCCDDA	Project Only Contact	<input type="checkbox"/>
Primary Contact	<input type="checkbox"/>	Contact Active	<input checked="" type="checkbox"/>
Collab User	<input type="checkbox"/>	Bid Contact	<input type="checkbox"/>
Estimated Start Date		Estimated End Date	
Employee Assigned	<input type="checkbox"/>		
Actual Start Date		Actual End Date	
Area Company		PM Contact Union	
Accident Record	Good	Tester Name	
E-Mail			
Address			
Address Code			
Business Address	David Arrowsmith 4850 Keele Street Ground Floor Orlando FL 32410 US		
Contact Information			
Work Phone	(407) 555-6544	Preferred Contact Method	MAIL
Home Phone		2nd E-mail	
Mobile		Pager	
Main Fax	(407) 555-0065	Web Page	

### *Project Contact Entry*

Within Collaboration, any contact on a project that is to be allowed to use CMiC I/O must have a Project Contact ID defined for the project. This is done via the Project Contact Directory page.

This ID code must be unique across the system. CMiC suggests that this code be defined as the Project Code plus the Contact Code.

# Using CMiC I/O

## Sending I/O Instructions to Project Contacts

In order for Project Contacts to use the CMiC I/O features instructions must be sent to the contact. This can be done on an object basis contact by contact or for a group of contacts. This is done via the Project Contact Maintenance page.

The screenshot displays the CMiC Contact Maintenance interface. On the left is a Project Management Menu with a search bar and a tree view containing various project-related folders like 'Communication Management', 'Project Calendar', and 'Project Partner Directory'. The main area is titled 'Contact Maintenance' and includes a top navigation bar with links like 'User Extensions', 'Send I/O Instructions' (highlighted in red), 'Add Contact', 'Edit', 'Delete', and 'Back To Log'. Below this, the 'User Profile' section contains fields for Company (Subcontractor Building Corporation), First Name (Radar), E-Mail (david@cmic.ca), Title (Mr), PM Role (SUB), Project Contact ID (DEFAULTDAVRO), Primary Contact (checkbox), Collab User (checkbox), Area Company, Accident Record (Good), and E-Mail. The 'E-mail Notifications' section includes Contact Code (RO), Last Name (O'Reilly), Initial (J), Suffix, Position (Owner/Subcontractor), Project Only Contact (checkbox), Contact Active (checked checkbox), Bid Contact (checkbox), PM Contact Union, and Tester Name. Below these are sections for 'Address' (Address Code, Business Address: Radar O'Reilly, 2911 Northern Walkway Lane Suite 2032, Miami FL 31028, US) and 'Contact Information' (Work Phone: (305) 422-2222, Home Phone, Mobile, Main Fax: (305) 422-2323, 2nd Fax, Use Alternate Fax Method (checkbox), Fax Prefix, Preferred Contact Method: MAIL, 2nd E-mail, Pager, Web Page, Other Info, Fax Suffix). A 'Photo' field is also present with the text 'is not on file.' and a 'User ID' field at the bottom left.

*IO Project Contact Example*

Use the [Send I/O Instructions] button to open a screen similar to below:

---

Email Information	
Send To <span style="border: 1px solid black; padding: 2px;">Radar O'Reilly</span> <span style="float: right;">▲</span>	Object Type <span style="border: 1px solid black; padding: 2px;">Issue</span> <span style="float: right;">▼</span>

---

**Message**

Dear Project Partner,

We are very pleased to inform you that it is now possible to submit Issues directly into our enterprise Project Management system by simply sending an email message to the address cmiciotestv10\_x@cmic.ca.

When submitting Issues, please ensure that the subject line contains the unique code "<SYSTEM\_GENERATED\_ID>". Within the message, Field Names are identified by placing a colon at the end of the word. The list of field names currently supported is provided below. Email Attachments will also be accepted.

For each Issue submitted, you will receive a confirmation email message, which will tell you what number has been assigned to the Issue in our system.

To quickly facilitate the preparation of a template or draft email message, copy the text provided below and paste it into a blank reply to this message.

---

Subject:  
Description:  
Severity:  
Author Issue No:

---

<input type="checkbox"/> Project Contacts	
<input type="checkbox"/> Radar O'Reilly	

*Send IO Instructions*

## Email Information

This first section of the window allows for the selection of the object type for which instructions are to be sent. There are currently 3 object types supported, RFI's, Communication Records and Issues. Each of these object types has a default email message associated. This message can be changed if required.

The Send To field will automatically default to the current contact record, but it is possible to send the same email to multiple project contacts at the same time by utilizing the Project Contacts section of the screen.

## Message

This section defaults a standard message for each type of object. Any of the text can be changed. Any changes made are strictly for the currently email being sent.

The field "<SYSTEM\_GENERATED\_ID>" should never be changed or removed, as this value is translated into the unique code sent to the contact that they must then use when submitting emails using CMiC I/O.

The email address should also never be changed, as this is retrieved from the CMiC I/O Parameter data defined.

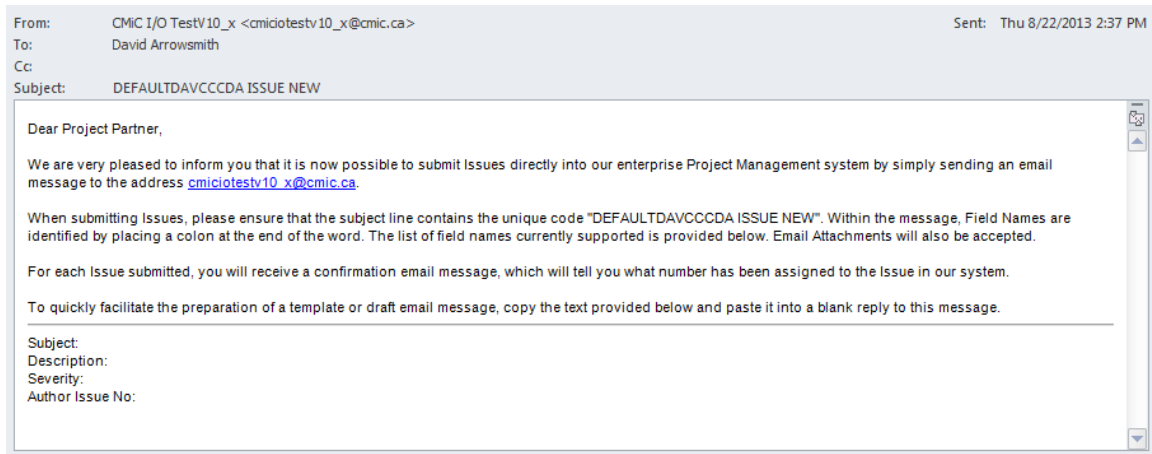
The area underneath the message displays the fields that are available for CMiC I/O for the current object. These are display only and cannot be changed.

## Project Contacts

This section allows the user to send the same instructions to more than one project contact. This area displays all external project contacts that have a 'Project Contact ID' assigned.

This area allows the user to check the Project Contacts box and all project contacts will automatically become checked, or the user can individually check required contacts. Any contact in this area that is checked will receive the CMiC I/O email instructions.

The email that is sent will look similar to below. Notice the 'Subject' of the email matches the unique code contained in the email body. The Subject contains 3 pieces of information. The Project Contact Unique ID, followed by the Object Type and Record Type Code. In this case the record Type Code is 'NEW' which is the record type code to be used when a New ISSUE is to be created.



*Create Issue by use of the Reply Option in the sent Email*

All the user has to do to create an ISSUE by CMiC IO is to reply to this email as shown.

---

## Creating a New Object via CMiC I/O

To create an Issue, Communication Record or RFI all a project contact has to do is to create an email with the required information. The easiest way to do this is to reply to the email sent by CMiC I/O. But so long as the user knows their Project Contact Unique ID Code they can create a new object by using the following.

### New Issue

Email Subject: Project Contact Unique ID ISSUE NEW

Fields:           Subject:  
                      Description:  
                      Severity:  
                      Customer Issue:

### New RFI

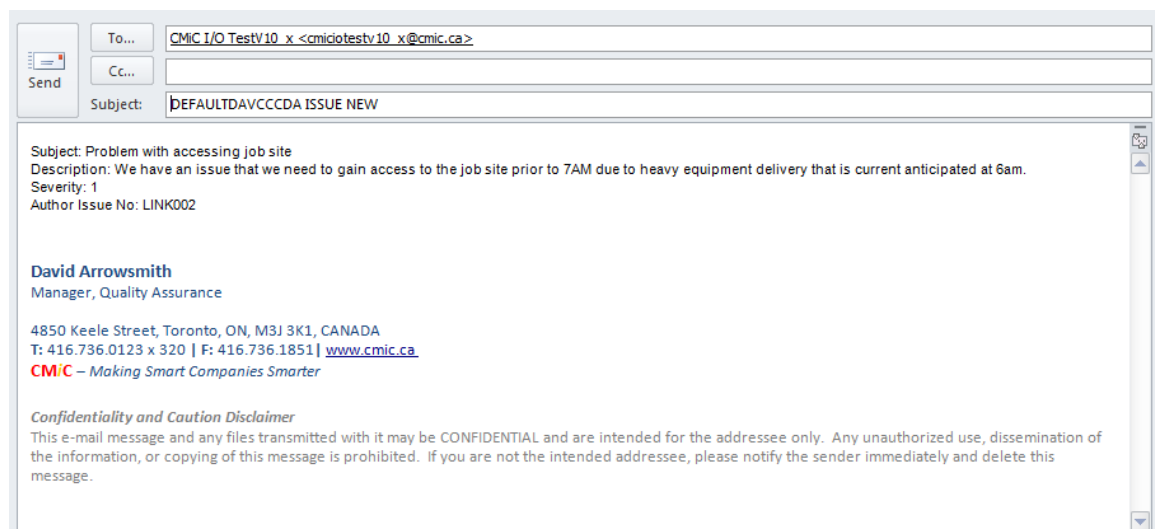
Email Subject: Project Contact Unique ID RFI NEW

Fields:           Subject:  
                      Date Required: YYYY-MM-DD  
                      Cost Amount:  
                      Question:  
                      Suggestion:

### New Communication

Email Subject: Project Contact Unique ID COMM NEW

Fields:           Subject:  
                      Message:



The screenshot shows an email client window with a 'Send' button on the left. The email header fields are: To: CMiC I/O TestV10 x <cmiciotestv10\_x@cmic.ca>, Cc: (empty), and Subject: DEFAULTDAVCCDA ISSUE NEW. The email body contains the following text:

Subject: Problem with accessing job site  
Description: We have an issue that we need to gain access to the job site prior to 7AM due to heavy equipment delivery that is current anticipated at 6am.  
Severity: 1  
Author Issue No: LINK002

**David Arrowsmith**  
Manager, Quality Assurance

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*Sample IO Email to create a New Issue*

When this email is sent, CMiC Enterprise will capture this email and create an Issue from it. This Issue is just like any other Issue created via Collaboration or CMiC Enterprise.

---

Once the new object has been created in CMiC the system will return a confirmation message to the user. This confirmation message contains the Unique ID required to add any further notes or updates to the object.

The 'To' contact is the person defined as the Default RFI Contact on the Project Maintenance screen in Enterprise PM.

## Updating an Object via CMiC I/O

### Confirmation Email Sample

Once an object has been created, the user who created it via CMiC I/O will receive a conformation email that contains the Unique ID required to further update the object with notes or attachments.

Note the subject line of the email. The Subject line now contains not only the Project Contact Unique ID but also the ID number of the object created.

To update the object, either reply to this email or create a new one with the required subject line.

When updating an object, any text written in the body of the email will be considered a Note on the object. It is also possible to include attachments by using the built-in email attachment function.

---

**NOTE:** The first reply to a CMiC I/O for an RFI object is assumed to be the answer.

---

The screenshot shows an email client window. The 'To' field contains 'CMiC I/O TestV10\_x <cmciotestv10\_x@cmic.ca>'. The 'Subject' field contains 'RE: DEFAULTDAVCCDA ISSUE ISS-DA-0001 Problem with accessing job site'. The email body contains the following text:

The response to the issue is fine when it is our own trucks that are delivering equipment, but this is not always so. Can you please have some sort of pass made up so that we can give to outside drivers that will allow them to pass security.

**David Arrowsmith**  
Manager, Quality Assurance

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**From:** CMiC I/O TestV10\_x [mailto:cmciotestv10\_x@cmic.ca]  
**Sent:** Thursday, August 22, 2013 2:44 PM  
**To:** David Arrowsmith  
**Subject:** DEFAULTDAVCCDA ISSUE ISS-DA-0001 Problem with accessing job site

**Issue Confirmation**

From	David Arrowsmith
To	
Project	DAV Company Default Project Sample for v10 Testing
Subject	Problem with accessing job site

### Update Example

The screenshot shows the CMiC Issues application interface. The left sidebar contains a 'Project Management Menu' with various options. The main area displays the 'Issue Detail' for issue ISS-DA-0001. The issue is titled 'Problem with accessing job site' and is assigned to David Arrowsmith. The issue is currently 'New' and has a 'Severity' of 'Low'. The 'Internal Description' states: 'We have an issue that we need to gain access to the job site prior to TAM due to heavy equipment delivery that is current anticipated at 6am.' The 'Resolution Date' is set to '22/Aug/2013 02:43 PM'. The 'Notes' section contains the following text:

**Author:** David Arrowsmith **Date:** 22/Aug/2013 02:51 PM **Internal:** ☐ **Hours:**

The response to the issue is fine when it is our own trucks that are delivering equipment, but this is not always so. Can you please have some sort of pass made up so that we can give to outside drivers that will allow them to pass security.

David Arrowsmith  
Manager, Quality Assurance

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Updated issue with Note via IO Email Reply from above



---

# Sending CMiC IO email from within Collaboration

## *Sending I/O From Within Collaboration*

Currently there are three application pages within Collaboration that have the ability to send CMiC I/O emails, these pages correspond to the objects that use CMiC I/O. They are Issues, RFI's and Communications.

This feature allows the user to enter a Note or Attachment against an object, and then create a CMiC IO email. Within these pages there is a button [**Send I/O Email**]. This button opens a window that will be similar to above.

This window allows the user to indicate if CC's, Notes and/or Attachments are to be included in the email.

### **Include Notes**

The user has the choice of All Notes, No Notes or Last. If Last is selected the user can enter the number of Last notes to be included. For example you may want to include the last 3 notes... As the number of notes changes so does the Message area of the email. This area includes the text of the notes selected.

### **Attachments**

All attachments on the object are shown under the subject line of the email. The user may select to include all attachments by using the general check box Attachments or they may individually select which attachment to include in the email.

### **CC's**

All CC's that are on the object who have been setup for CMiC I/O will be shown in a fashion similar to attachments. The user may select to include all CC's by using the general check box CC's or they may individually select who to include in the email.

---

## CMiC I/O for Punch Lists

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CMiC I/O Emails can now be sent from the Punchlist JSP. You can use the CMiC I/O email to populate the detail section of an existing Punchlist. To do this, while in view mode of the Punch list, use the [**Send I/O Email**] button to send an email to the person who will be submitting the punch list details. If the punch list was un-submitted, once you select the I/O email button, the status will change to 'Submitted'. The CMiC I/O popup box includes instructions on what to do.

There are some requirements for the way in which the details should be entered by the person who will respond to the email that was originally sent by CMiC I/O:

- The only fields that can be returned to CMiC IO are the **mandatory** description and up to four **optional** location fields (representing the 'Area' fields for punch list details).
- Each punch list item is delimited by '<>'
- Area fields are prefixed by the word 'Location:' (upper or lower case, colon included) and are separated by a comma, for example,

Location: Building A, 15<sup>th</sup> Floor, Unit 1509, Kitchen

Thus Area 1 = "Building A"

Area 2 = "15<sup>th</sup> Floor"

Area 3 = "Unit 1509"

Area 4 = "Kitchen"

The location is optional, so it is possible to simply enter a description with no special prompts.

If the user wants to send several items at once the response will look something like the following:

Fix the hole in the wall.

Location: Building A, 15<sup>th</sup> floor, Unit 1509, Kitchen

<>

Check that all electrical outlets have plates on them.

<>

Repaint.

The following fields will be populated automatically when the item is created:

- Item # will be the next sequential number.
- Status will be "open";
- "Received On" will be the current date.

To keep adding additional punch list items to the same punch list via CMiC I/O, responses will have to be made each time to the **original** CMiC email that was received. Similarly, attachments can also be made, by attaching documents to the reply email.

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