Reference Guide

Microsoft Integration Package v10x (ADF)

By CMiC

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international Corp.

Proprietary Notice

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Microsoft® Integration Package – ADF

Overview – Microsoft® Integration Package

CMiC Microsoft Integration Package (**MIP**) is a component that allows the use of Microsoft Word® documents to easily create templates for MIP based Form Letters (MIP Word Documents), and provides Word documents as output from MIP Documents in order to touch-up or edit their output more easily. MIP also allows Microsoft Excel® Worksheets, with or without macros, to be used as standard templates for the printing of specified data through CMiC's **Send-to-Spreadsheet** feature. Lastly, MIP provides integration between Microsoft Outlook® Calendar and CMiC Contacts.

NOTE: MIP functionality achieved via ADF, Forms, and JSP based screens.

The following are the features included within the Microsoft Integration Package.

Microsoft Word® Integration

- Set up an unlimited number of Microsoft Word® Documents to be used as standard Form Letter output to be printed from any screen within CMiC Software.
- Use the existing CMiC Form Letter Definition screen to identify the data sources to be used as well as the relationships between the master and detail tables.
- Merge standard text embedded within the Microsoft Word® Documents with data stored anywhere within the CMiC database.
- Easily position CMiC database fields on the Microsoft Word® Documents using pre-defined place-holder values such as <<Project Name>>, <<Project Address 1>>.
- Format pages as required, including paper size, margins, orientation, headers, footers, sections, tabs and indents.
- Allow for an unlimited number of format changes, such as bold, underline, italics, fonts and font size changes, within each section or sub-table.
- Embed an unlimited number graphics and images within the documents as desired.
- Embed an unlimited number of sub-tables within each document as required, allowing for detailed schedules and lists to be inserted at any point.

Microsoft Excel® Integration

- Set up an unlimited number of pre-formatted Excel® Worksheets to be used as standard templates when using the CMiC '**Send-to-Spreadsheet**' feature.

- Insert data into specified locations on Excel® Worksheets on demand, allowing for dynamic spreadsheet updates.
- Dynamically refresh Excel® Charts and Graphs, using the ability to update specific cells with updated data on demand.
- Format target worksheets as required, including paper size, column widths, margins, orientation, headers, and footers.

Microsoft Outlook® Calendar Integration

- Schedule Calendar Events in Microsoft Outlook® and synchronize them with Action Items scheduled within CMiC.
- Create Action Items in CMiC and synchronize them with Calendar Events entered in Microsoft Outlook®.
- Schedule and synchronize Recurring Events.
- Update and synchronize Event details and notes.
- Synchronize both public and private action items.

Microsoft Outlook® Contact Integration

- Synchronize all contact data from your CMiC Project Management or CMiC CRM system with Microsoft Outlook®.
- Synchronize your own personal contact directory with the safe and secure CMiC Contact database

Document Merge with Microsoft Word®

Overview – MIP Word® Documents (MIP Form Letters)

Forms Based Form Letters vs MIP Based Form Letters

CMiC Enterprise uses two types of form letters: Forms based form letters, and the newer MIP based form letters. The older version of CMiC's Form Letters uses the Form Letter Designer functionality of the Forms based Form Letter Definitions screen to create their templates. The newer type of CMiC's Form Letters (MIP Word Documents) uses the Microsoft Integration Package to enable the use of a Microsoft Word document as a template for a form letter, and the generated output of this newer form letter type is also a Word document. This simplifies and enhances the process of creating form letter templates, and of editing their output, through the use of Microsoft Word and all of its functionality.

MIP Word® Documents (MIP Based Form Letters)

MIP Word Documents are a type of form letter, hence, templates are also used to generate them. Like CMiC's Forms based Form Letters, they are used to create custom form letters that may be printed from the Project Management, Opportunity Management, Human Resources or Accounts Payable modules.

Form Letters, including MIP based Form Letters (MIP Word Documents), are most commonly used in the Project Management module, where there are many specialty CMiC Form Letters to enhance the communication between the various parties involved in a project. As with Form's based Form Letters, variations of MIP Word Documents can be created from scratch, or more easily, by using a copy of an existing MIP Word Document's Template as a starting point. For instance, multiple versions of your Subcontract Agreement, distinguished by the type of work being done, can be created by making copies of the standard version, and then making the necessary changes to the copies.

Create MIP Word® Document using Microsoft Word® Based Template

MIP based Form Letters (MIP Word Documents) use templates that are Microsoft Word (DOCX format) documents to specify the static text and dynamic data to be outputted. Word templates for MIP Word Documents are created by specifying replacement fields as form fields in the template, which the system replaces with data from the database when the MIP Word Document is generated.

The output of a MIP Word Document is also a Word document, which means it can be easily edited or touched up using all of the functionality of Microsoft Word.

The following outlines the steps required to create and print MIP Word Documents:

1) Register data source(s) to use in MIP Word Document (if necessary)
2) Create new Document Type for MIP Word Document (if necessary)

3) Create MIP Word Document definition

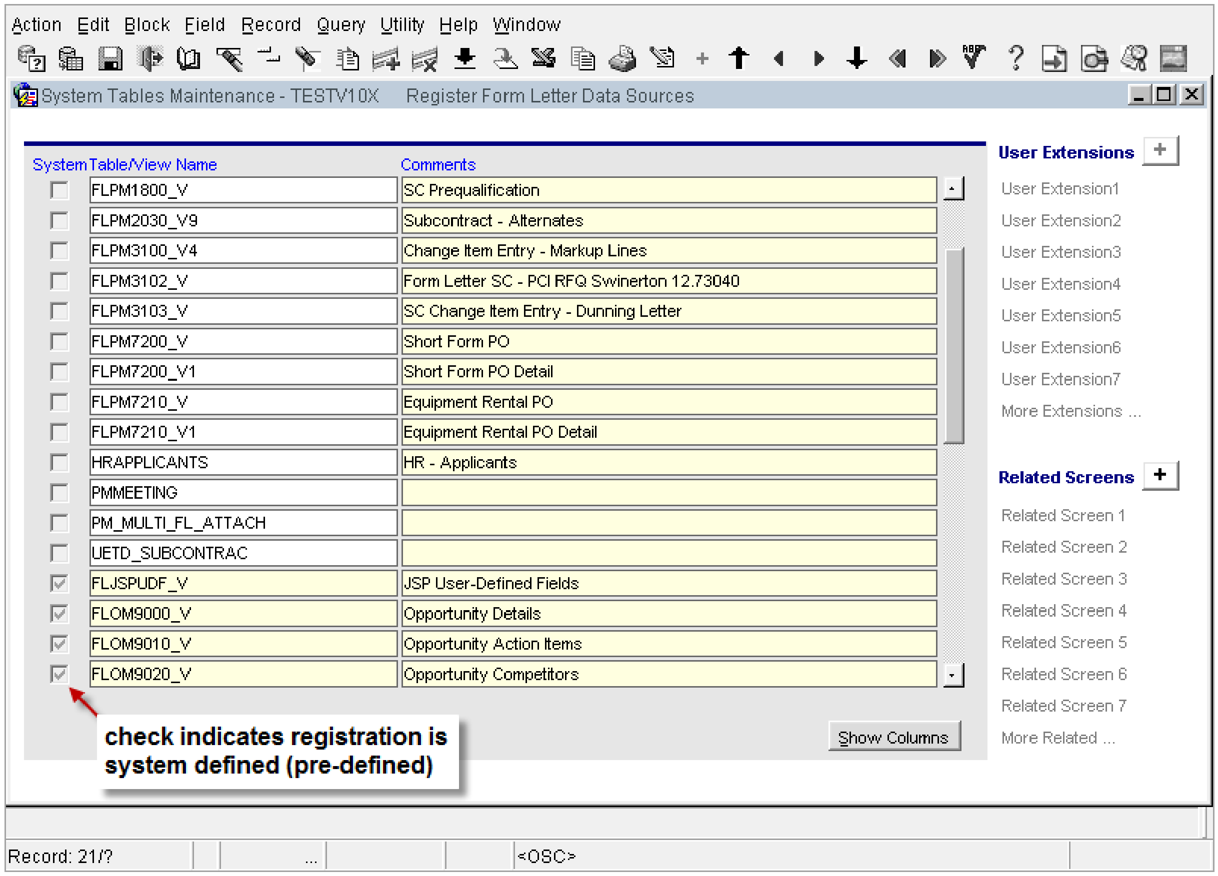
4) Print Document Merge Field List

5) Create MIP Word Template to generate MIP Word Document

6) Upload MIP Word Template for MIP Document Definition

7) Print MIP Word Document

Step 1: Register Data Source to use in MIP Word® Document



Sample of Register Data Sources screen (standard Treeview path: ***System*** *>* ***Forms*** *>* ***Register Data Sources****)*

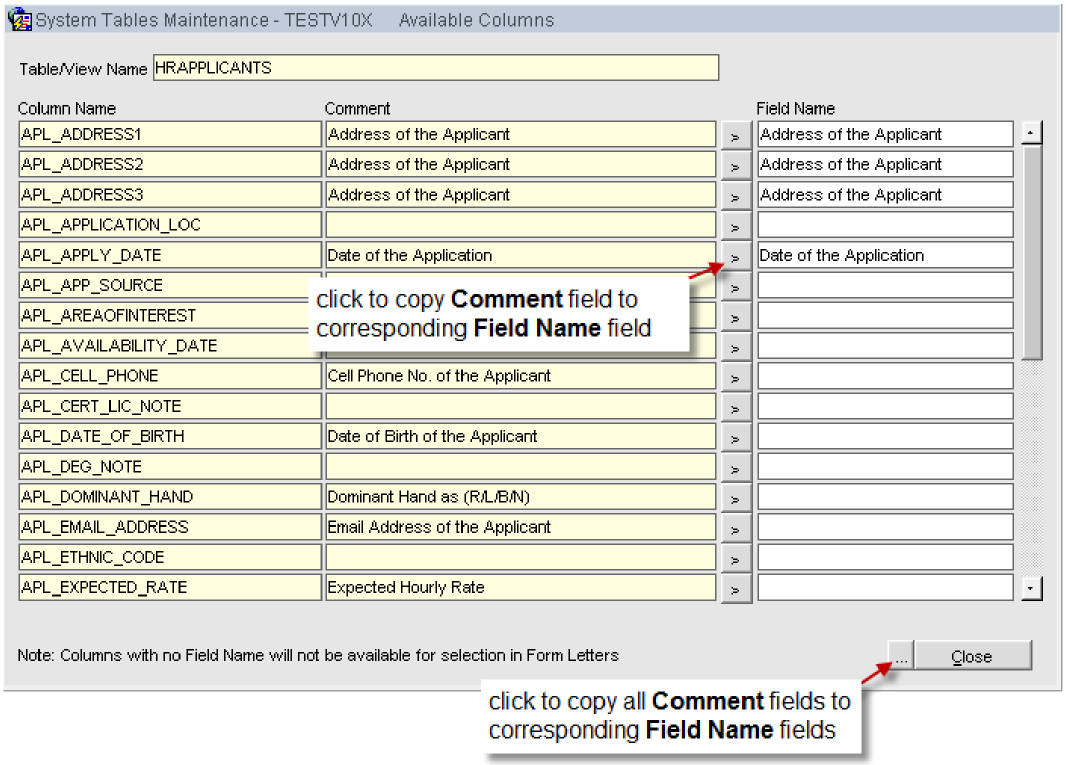
If you need to use a data source in an MIP Word Document that has not yet been registered in the system, use the Forms based Register Data Sources screen to do so. By default, when the system is initially installed, only the data sources that are utilized by standard CMiC Form Letters are registered.

Data sources are Enterprise tables or views that an administrator has made available through this registration process for the purpose of designing MIP Word Documents, or Forms based Forms Letters.

As shown in the above screenshot, a checkmark under the **System** column indicates that the registered data source is system defined (pre-defined). Registered data sources that are system defined are not editable, as that could cause any standard Form Letters that use them to stop functioning.

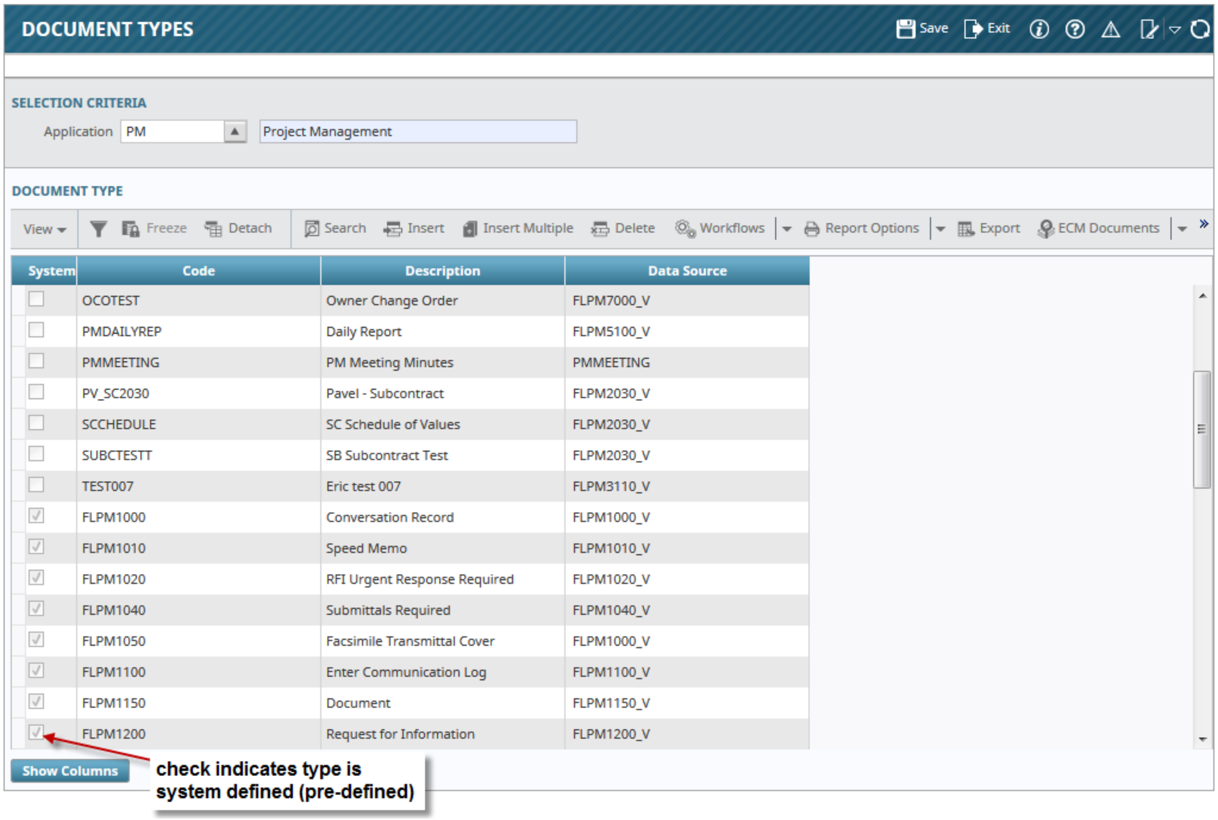
A new data source is registered by inserting a row in the table, then using the F9 function key in the **Table/View Name** column to search for and select the relevant table or view. Next, click the [**Show Columns**] button to ensure that all necessary columns of the data source's table or view are available for MIP Word Documents. See the following section for details.

[**Show Columns**] – Button



Once the table or view has been selected, the [**Show Columns**] button can be clicked to view the names of the table's or view's columns. The **Field Name** field for a column must be entered in order to make the column available during the creation of MIP Word documents (or Forms based Form Letters). As shown in the above screenshot, the > button can be used to copy a **Comment** field to the corresponding **Field Name** field, and the ... button can be used to copy all **Comment** fields to the corresponding **Field Name** fields.

Step 2: Create New Document Type for MIP Word® Document



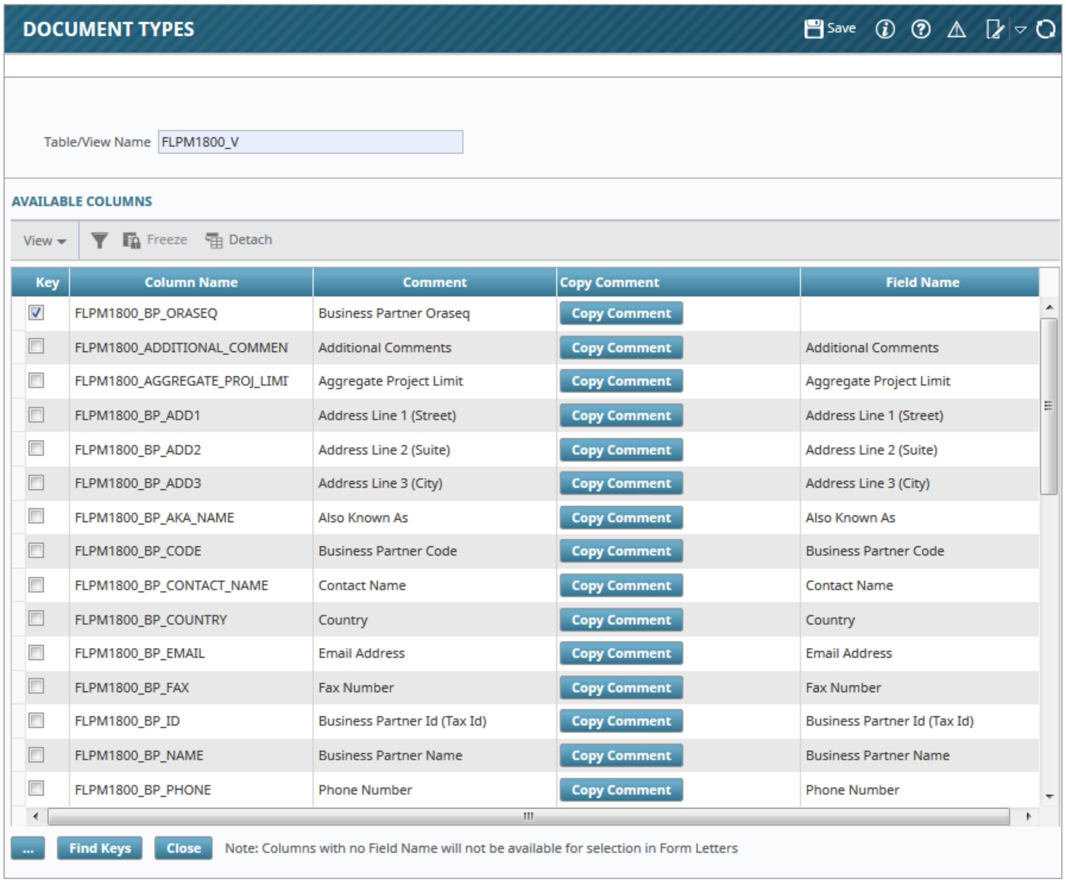
System	Code	Description	Data Source
☐	OCOTEST	Owner Change Order	FLPM7000_V
☐	PMDAILYREP	Daily Report	FLPM5100_V
☐	PMMEETING	PM Meeting Minutes	PMMEETING
☐	PV_SC2030	Pavel - Subcontract	FLPM2030_V
☐	SCCHEDULE	SC Schedule of Values	FLPM2030_V
☐	SUBCTESTT	SB Subcontract Test	FLPM2030_V
☐	TEST007	Eric test 007	FLPM3110_V
☑	FLPM1000	Conversation Record	FLPM1000_V
☑	FLPM1010	Speed Memo	FLPM1010_V
☑	FLPM1020	RFI Urgent Response Required	FLPM1020_V
☑	FLPM1040	Submittals Required	FLPM1040_V
☑	FLPM1050	Facsimile Transmittal Cover	FLPM1000_V
☑	FLPM1100	Enter Communication Log	FLPM1100_V
☑	FLPM1150	Document	FLPM1150_V
☑	FLPM1200	Request for Information	FLPM1200_V

*Sample of Form Letter Document Types screen (standard Treeview path: **System** > **Forms** > **Form Letter Document Types**)*

Document Types (also known as Form Letter Types) are associated to a data source, and they are used to create and group MIP Word Documents and PM Form Letters. This step is only necessary if an appropriate Document Type for a new MIP Word Document has not yet been defined in the system. As shown in the above screenshot, system defined Document Types have a check in the **System** column.

To create a new Document Type, click the Block Toolbar's [**Insert**] button to insert a new row. Then, enter a code and description for the new Document Type, and select a data source using the **Data Source** field's LOV.

[**Show Columns**] – Button



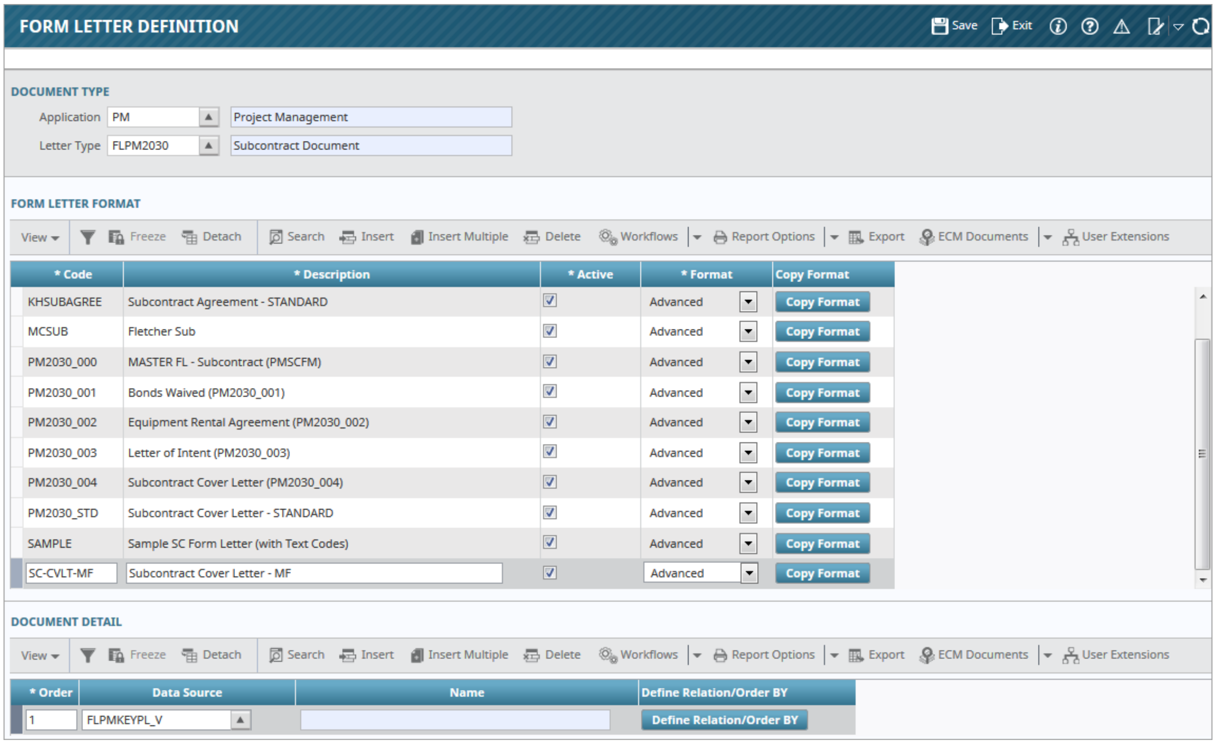
The [**Show Columns**] button on the Form Letter Document Types screen shows the columns of the data source specified for the Document type.

The **Key** checkbox is used to indicate which columns can be used to link rows from one data source to another (e.g. link a Project record to its corresponding Opportunity record in order to display information from both).

The following table provides details about the buttons on this pop-up:

Button	Description
Copy Comment	Replaces the value in the **Field Name** field with the value from the **Comment** field.
...	Used to replace all the values of the **Field Name** fields with the values from the **Comment** fields.
Find Keys	Provides a list of all primary and unique keys for the data source’s table or view. However, it should be noted, primary or unique keys cannot be identified for all views. Keys are used to link rows (records) from one data source to another.

Step 3: Create MIP Word® Document Definition



*Sample of Form Letter Definitions screen (standard Treeview path: **System > Forms > Form Letter Definitions**)*

The next step in creating a MIP Word Document is to use the Form Letter Definition screen to define the MIP Document in the system.

Document Type – Section

This section is used to select the Enterprise module in which the new MIP Word Document will be available, using the **Application** field, and the Document Type (aka Form Letter Type) of the new MIP Document using the **Letter Type** field. Recall, the primary data source for the MIP Document is specified by the Document Type of the MIP Document.

Form Letter Format – Section

This section is used to enter the name and code for the MIP Word Document in the system, and to indicate if the MIP Document is active.

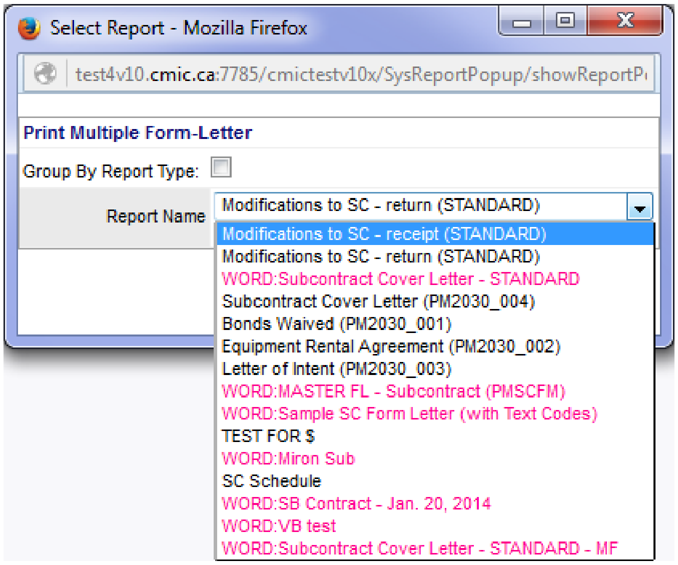
Rename MIP Document

This screen is also used to change a MIP Document Definition's **Description** field, which is used to identify its associated MIP Word Document from a list (see following screenshot of Select Report pop-up), when going to print it.

NOTE: For Enterprise users, definitions are shared by all Companies, so this must be kept in mind when coming up with formats for the identifying **Description** field. For CMiC Public Cloud users, each tenant gets their own definitions, so changes to them will not affect other tenants.

Make MIP Document Available for Printing

To make the MIP Document available for printing, the **Active** checkbox must be checked. If it is active, it will be available through the pop-up used to select the MIP Document to print, as shown below.



As shown in the above screenshot of a pop-up to select a report or from letter to print, the description entered in the **Description** field on the Form Letter Definition screen also serves as the name of the MIP Word Document, and its name will be pink and have the prefix "**WORD:**" to indicate that its generated output is a Microsoft Word document.

Copy Format: Create Variants of Existing MIP Word Document Definitions

The [**Copy Format**] button of this section can be used to create a copy of an existing MIP Document Definition, such as that for a standard, system MIP Word Document.

NOTE: For Enterprise users, definitions are shared by all Companies, so this must be kept in mind when coming up with formats for the identifying **Description** field. For CMiC Public Cloud users, each tenant gets their own definitions, so changes to them will not affect other tenants.

The pop-up launched by this button, shown above, is used to enter a code and description for the new MIP Document Definition. The new MIP Document Definition will have the following copied:

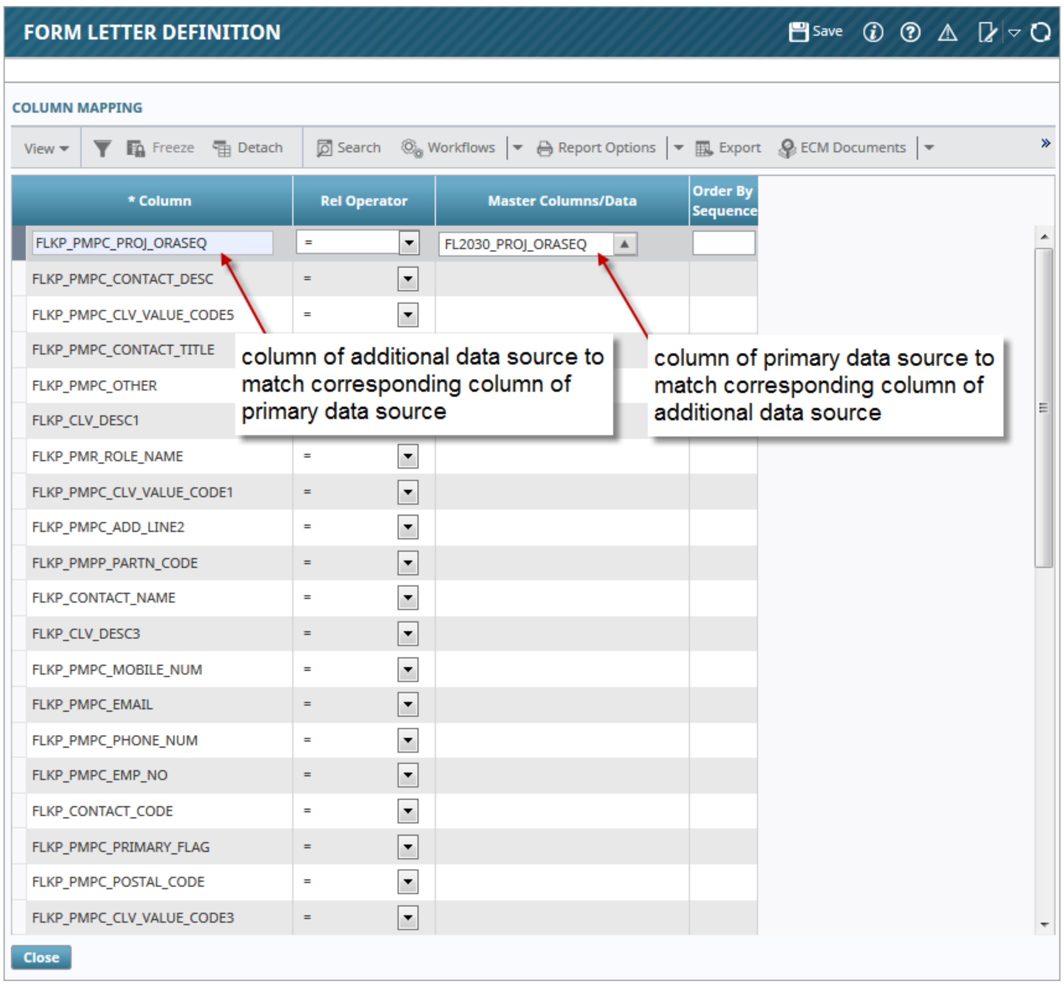
- Document Type, which is associated to a particular data source
- any joined data sources, joined through **Document Detail** section (relations between primary data source and additional data sources are specified)

Document Detail – Section

If required, this section is used to specify additional data sources, and to specify which columns to use, as keys, in matching and linking a row (record) from the primary data source to a corresponding row in an additional data sources (e.g. link a Project record to its corresponding Opportunity record in order to display information from both).

To specify an additional data source, click [**Insert**] on this section's Block Tool, then using the new row, enter the order and select the data source. Then click [**Define Relation/Order By**] to define the relation (link) between the primary data source and this additional data source.

– Button



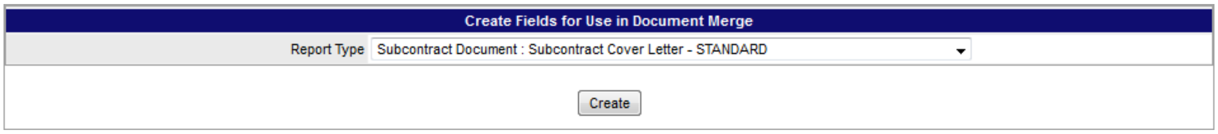
This launched screen is used to specify which columns to use in matching and linking a row (record) from the primary data source to a corresponding row in an additional data sources. For instance, it can be used to link a Project record to its corresponding Opportunity record in order to display information from both.

The following provides details about the columns in this screen's table:

Column	Description
Column	Columns of additional data source.
Rel Operator	Relational Operator: operator used in matching column values (exact matches, partial matches …)

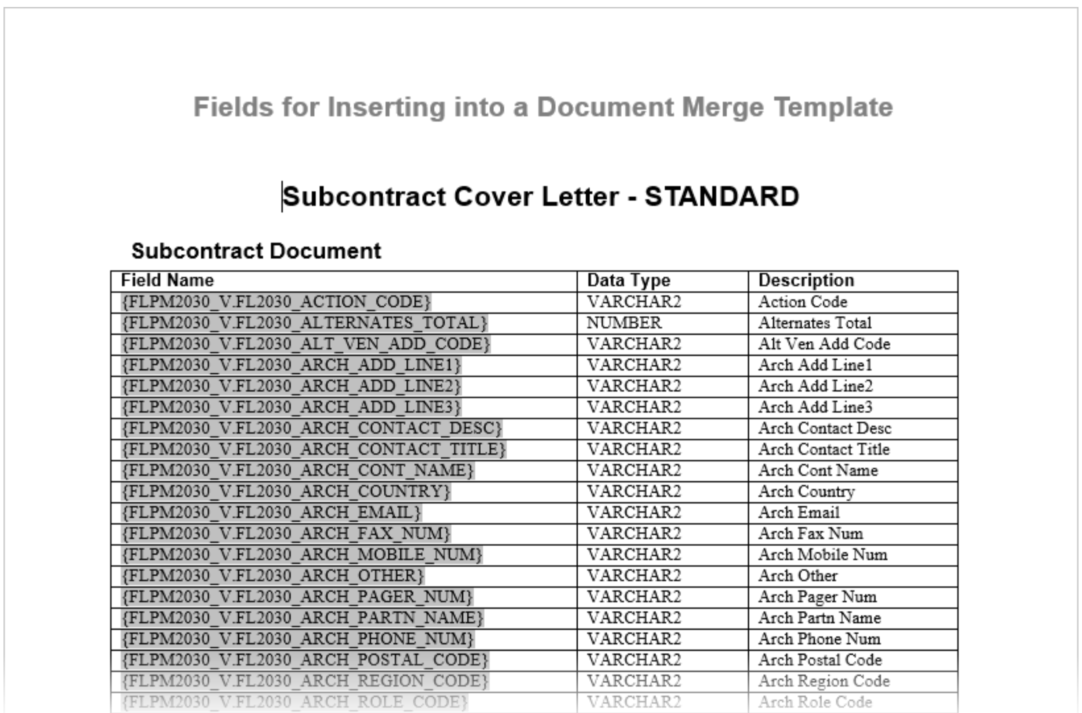
Master Columns/Data	Columns of primary data source.
Order By Sequence	Sets the order in which the comparisons are made in matching a row (record) from one data source to another.

Step 4: Print Document Merge Field List



*Sample of Document Merge Field List screen (standard Treeview path: **Project Management > File Maintenance > Document Merge > Document Merge Field List**)*

Through the Document Merge Field List screen, shown above, the columns of the primary and any additional data sources specified for the MIP Document, specified during the previous steps, are printed as *replacement fields* (printout shown below).



Fields for Inserting into a Document Merge Template

Subcontract Cover Letter - STANDARD

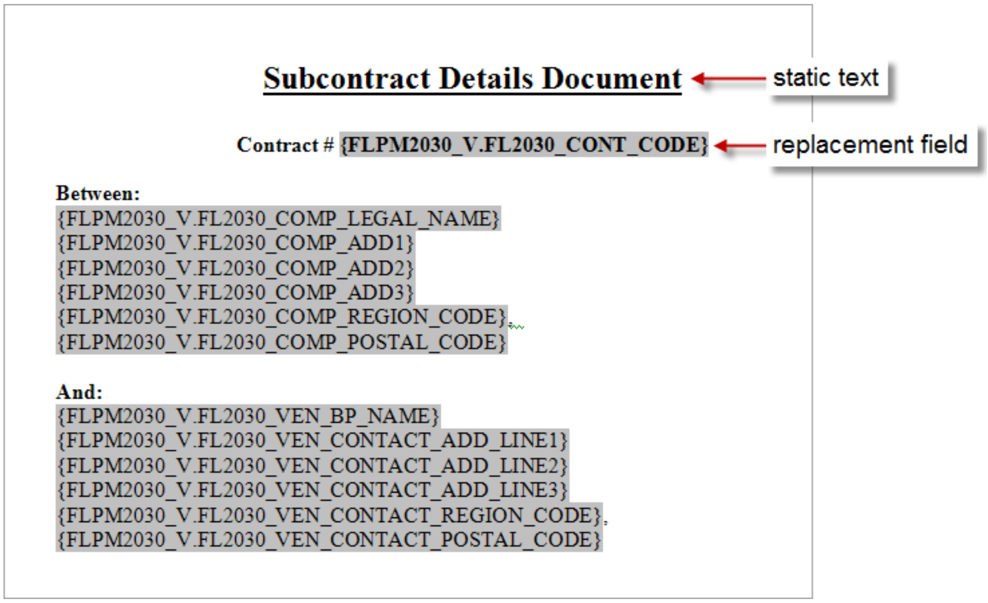
Subcontract Document

Field Name	Data Type	Description
{FLPM2030_V.FL2030_ACTION_CODE}	VARCHAR2	Action Code
{FLPM2030_V.FL2030_ALTERNATES_TOTAL}	NUMBER	Alternates Total
{FLPM2030_V.FL2030_ALT_VEN_ADD_CODE}	VARCHAR2	Alt Ven Add Code
{FLPM2030_V.FL2030_ARCH_ADD_LINE1}	VARCHAR2	Arch Add Line1
{FLPM2030_V.FL2030_ARCH_ADD_LINE2}	VARCHAR2	Arch Add Line2
{FLPM2030_V.FL2030_ARCH_ADD_LINE3}	VARCHAR2	Arch Add Line3
{FLPM2030_V.FL2030_ARCH_CONTACT_DESC}	VARCHAR2	Arch Contact Desc
{FLPM2030_V.FL2030_ARCH_CONTACT_TITLE}	VARCHAR2	Arch Contact Title
{FLPM2030_V.FL2030_ARCH_CONT_NAME}	VARCHAR2	Arch Cont Name
{FLPM2030_V.FL2030_ARCH_COUNTRY}	VARCHAR2	Arch Country
{FLPM2030_V.FL2030_ARCH_EMAIL}	VARCHAR2	Arch Email
{FLPM2030_V.FL2030_ARCH_FAX_NUM}	VARCHAR2	Arch Fax Num
{FLPM2030_V.FL2030_ARCH_MOBILE_NUM}	VARCHAR2	Arch Mobile Num
{FLPM2030_V.FL2030_ARCH_OTHER}	VARCHAR2	Arch Other
{FLPM2030_V.FL2030_ARCH_PAGER_NUM}	VARCHAR2	Arch Pager Num
{FLPM2030_V.FL2030_ARCH_PARTN_NAME}	VARCHAR2	Arch Partn Name
{FLPM2030_V.FL2030_ARCH_PHONE_NUM}	VARCHAR2	Arch Phone Num
{FLPM2030_V.FL2030_ARCH_POSTAL_CODE}	VARCHAR2	Arch Postal Code
{FLPM2030_V.FL2030_ARCH_REGION_CODE}	VARCHAR2	Arch Region Code
{FLPM2030_V.FL2030_ARCH_ROLE_CODE}	VARCHAR2	Arch Role Code

Replacement fields are identifiers for columns in a data source's table or view, surrounded by the "**{ }**" brackets (shown under **Field Name** column of table in above screenshot). When creating the template for the MIP Document, they can be cut and pasted from the printout into the template, and when the MIP Document is generated, the replacement fields will be replaced with the specified column's value.

To print the fields for the data sources used by the MIP Document, select the name of the MIP Document defined in the previous step using the **Report Type** field, then click [**Create**].

Step 5: Create MIP Word® Template to Generate MIP Word® Document



Subcontract Details Document

Contract # {FLPM2030_V.FL2030_CONT_CODE}

Between:
{FLPM2030_V.FL2030_COMP_LEGAL_NAME}
{FLPM2030_V.FL2030_COMP_ADD1}
{FLPM2030_V.FL2030_COMP_ADD2}
{FLPM2030_V.FL2030_COMP_ADD3}
{FLPM2030_V.FL2030_COMP_REGION_CODE},
{FLPM2030_V.FL2030_COMP_POSTAL_CODE}

And:
{FLPM2030_V.FL2030_VEN_BP_NAME}
{FLPM2030_V.FL2030_VEN_CONTACT_ADD_LINE1}
{FLPM2030_V.FL2030_VEN_CONTACT_ADD_LINE2}
{FLPM2030_V.FL2030_VEN_CONTACT_ADD_LINE3}
{FLPM2030_V.FL2030_VEN_CONTACT_REGION_CODE},
{FLPM2030_V.FL2030_VEN_CONTACT_POSTAL_CODE}

Sample of Word based MIP Template, composed of static text and replacement fields.

To create a MIP Template, either use Microsoft Word to create a new template from scratch or create a copy of an existing template in order to use Word to create a variant of it.

As shown in the above screenshot, a template is composed of static text and replacement fields, however, it can also be composed of tables, pictures or any other objects in Word. To create a template, simply include any necessary text or object (table, picture …) and format it in any way allowable by Word. Also, copy and paste any necessary replacement fields from the Merge Field List document, printed in the previous step, to an appropriate position in the template. When the MIP Document is generated using the template, the replacement fields will be replaced by the values of the specified data source's columns. When the template is finished, save it using the **DOCX** format.

Additional special fields may optionally follow a replacement field (MIP field) and are treated as modifiers for the replacement operation. Note, these modifiers must be added just after a replacement field, as per the following example:

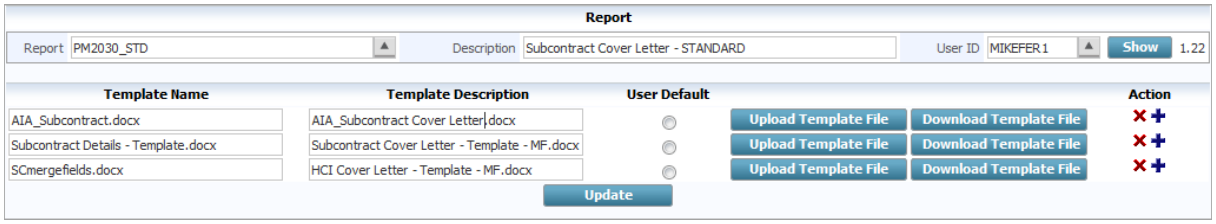
{REPLACEMENT_FIELD} {Currency} ← replacement field modifier

The follow provides details about the available replacement field modifiers:

Modifier	Description
{NumToText}	Convert the numeric value to words.
{Currency}	Format the numeric value as currency.
{Number}	Format the numeric value with commas and a decimal point (new)
{Percent}	Multiply by 100 and append a percent sign.

NOTE: Only a single level of detail will be supported – as is currently the case with CMiC Form Letters.

Step 6: Upload MIP® Word Template for MIP Document Definition



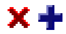
Sample of Document Merge Maintenance screen (standard Treeview path: ***Project Management > File Maintenance > Document Merge > Document Merge Maintenance****)*

Completed MIP Templates must be uploaded into the system through the Document Merge Maintenance screen, shown above, so that they can be used to generate MIP Word Documents. This step links the MIP Template with the MIP Word Document defined through the Form Letter Definitions screen (Step 3). For each defined MIP Document, multiple MIP Template variants may be associated to it (three templates are associated to MIP Document shown in above screenshot), then when going to print the MIP Document, the relevant template can be selected. If desired, a template can be associated to a user ID so that it will automatically be selected for the user when the user goes to print the MIP Document.

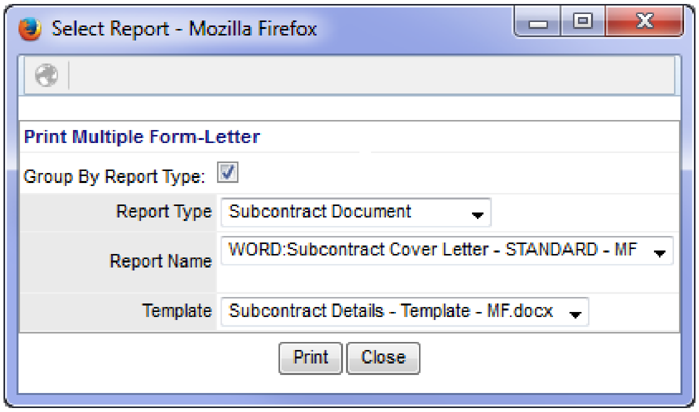
This screen is also used to download a MIP Template in order to use it as a starting point (base) to create a new variant of a MIP Document. See the description for the [**Download Template File**] button in the below table.

The following table provides details about the fields and buttons on this screen:

Field / Button	Description
Report	Select the MIP Document defined in Step 3, for which the template will be uploaded. All MIP Documents defined through the Form Letter Definitions screen will be available through this list.
Description	Display only field, displaying a description for the selected Report Type (Document Type).
User ID	Optionally, the template to upload can be assigned to a user. If a user ID is selected, the **User Default** radio button will become available to set whether or not the template is to be the user's default for the MIP Document.
Template Name	Display only field, displaying file name of DOCX MIP Template file.
Template Description	Identifies the MIP Template in the system. After a template is uploaded, this field can be used to change the templates description. The description is used to identify the MIP Document in the system, such as identifying it from the **Report Name** LOV of the Select Report pop-up used to select the document to print.
User Default (radio button)	If a user ID is selected for the **User ID** field, this radio button will become available to set whether or not the template is to be the user's default for the MIP Document.
Upload Template File	Used to browse for and select the Word template to upload. Once uploaded, the **Template Description** field, which identifies the template in the system, can be changed if desired.
Download Template File	Used to download a Word Template in order to use it as a starting point for the creation of a variant version of it. This is the easiest way to create a new MIP Document.

	Used to associate a new MIP Template to the MIP Document, or to disassociate a template from the MIP Document.
	Click to update any changes.

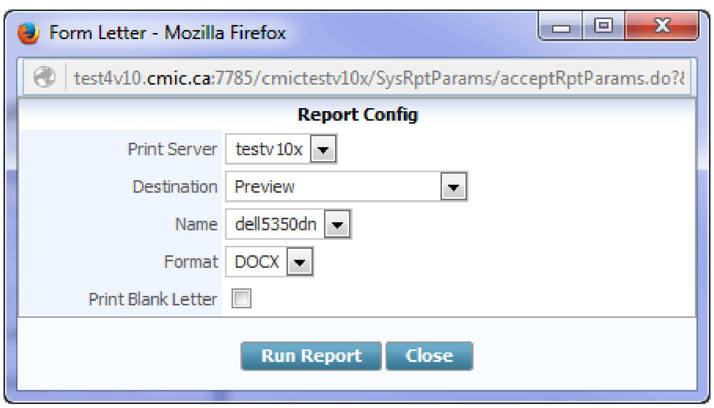
Step 7: Print MIP Word® Document (JSP)



1. Select the document to be printed, and then click the [**Print**] button. The Print Options pop-up, sample shown above, will appear.

2. From the report type drop down list, select desired report type. Word based MIP Templates will appear as pink entries in the list, and will be preceded by the identifier **WORD**.

3. After selecting a word template, a dropdown for Report Template will appear. Select the desired template from the dropdown list and click [**Print**].



4. In the Report Configuration pop-up, shown above, select the destination and click [**Run Report**].

NOTE: The only format available for Word templates at present is the DOCX format.

Reports with the destination set to preview will be created as DOCX documents, which you can save as required on the workstation. Reports with the destination set to Cold Storage will be written directly to the Imaging server using parameters inherited from the cold storage setup on the client's system. Reports with the destination set to Cold Storage with preview will be written directly to the Imaging server using parameters inherited from the Cold Storage setup on the client's system, and the resulting document will be opened in Image Manager for preview purposes.

When the output is opened via Word in a DOCX format, all fields that were merged will display with a gray background – this is a view only feature – when the document is actually printed, the gray will not be printed.

Document Merge with Microsoft Excel®

Overview – MIP Excel® Documents

The [**Send To Spreadsheet**] functionality has been enhanced through the introduction of MIP Excel Documents. MIP Excel Documents use templates that are Microsoft Excel (XLSX or XLXM format) documents to specify the static text and dynamic data to be outputted. Excel templates for MIP Excel Documents are created by inserting replacement fields into desired positions in the template, which the system replaces with data from the database when the MIP Excel Document is generated.

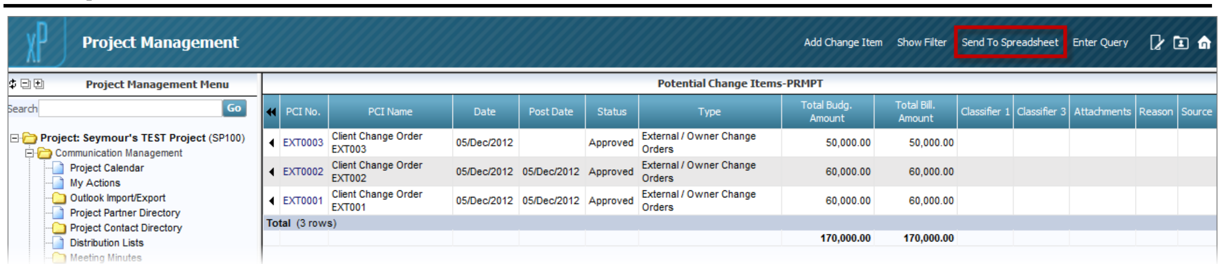
NOTE: In order to edit or view the XLSX/XLSM files using older versions of MS Excel®, it may be necessary to install the free Microsoft Office® Compatibility Pack for Word, Excel®, and PowerPoint 2007 File Formats plug-in. Instructions for doing so can be found at the following URL:
http://www.microsoft.com/downloads/details.aspx?FamilyId=941B3470-3AE9-4AEE-8F43-C6BB74CD1466&displaylang=en
The actual plug-in installation file can be downloaded from this site. Its name is **FileFormatConverters.exe**.

The following outlines the steps required to create new Document Merge Excel templates (MIP Excel Document), and how to print using a defined Document Merge template.

There are 5 steps in creating a Microsoft Merge Document:

1) Print relevant Excel Document to use as base (starting point) for new template
2) Create MIP Excel Document Template
3) Upload new MIP Excel Template for new MIP Excel Document
4) Restrict MIP Excel Template availability by Company & Project
5) Print Excel Document using new Excel Document Template

Step 1: Print Relevant Excel® Document to Use as Base for New Template

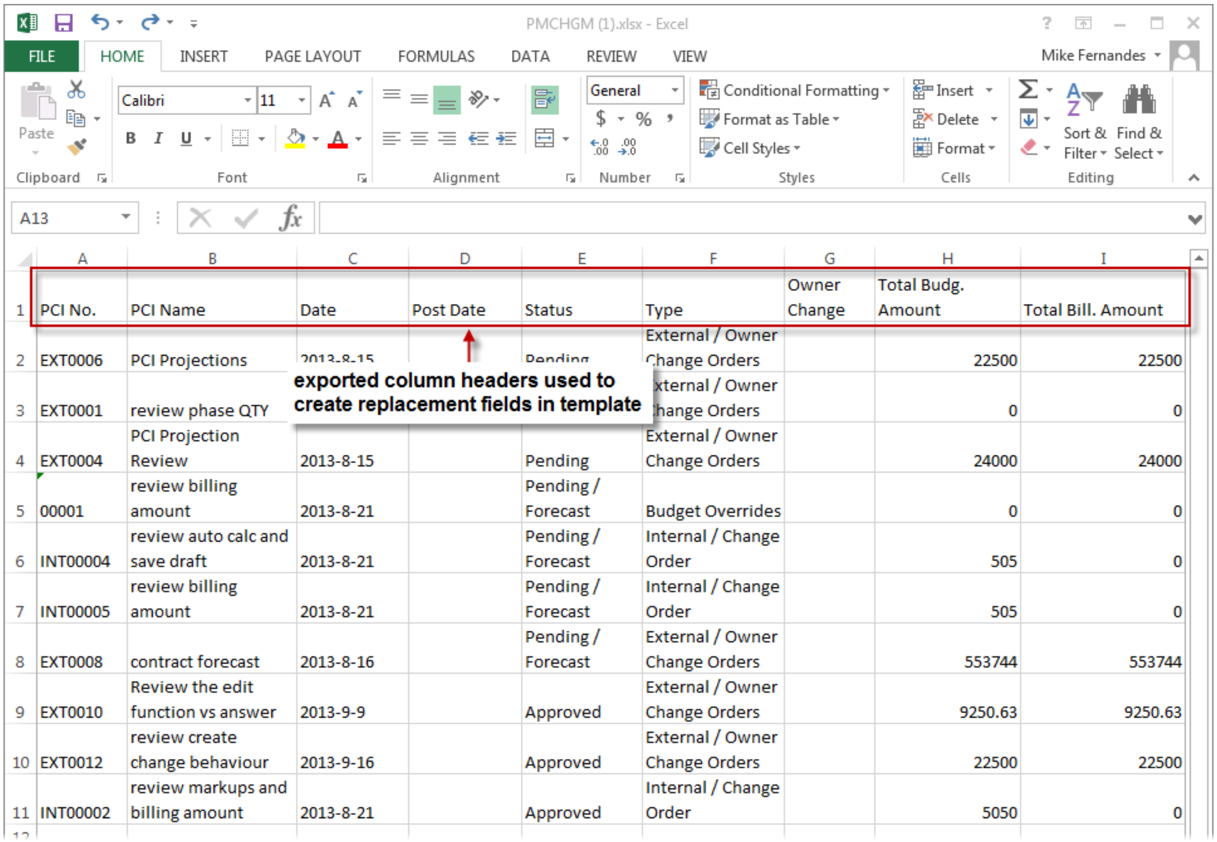


*Sample of screen with [**Send to Spreadsheet**] button.*

In generating a MIP Excel Document, the system uses a MIP Excel Document Template. To create a new MIP Excel Document, a new template is required. The easiest way to create a new template is to print an existing Excel Document that can best be used as a base (starting point) for the new template. This is so because the replacement fields in the template that specify which columns the data is to come from use the exported column headers as the column identifier (see following screenshot).

Alternatively, an existing template can be download in order to use it as a base for a new template (see step 3 for details).

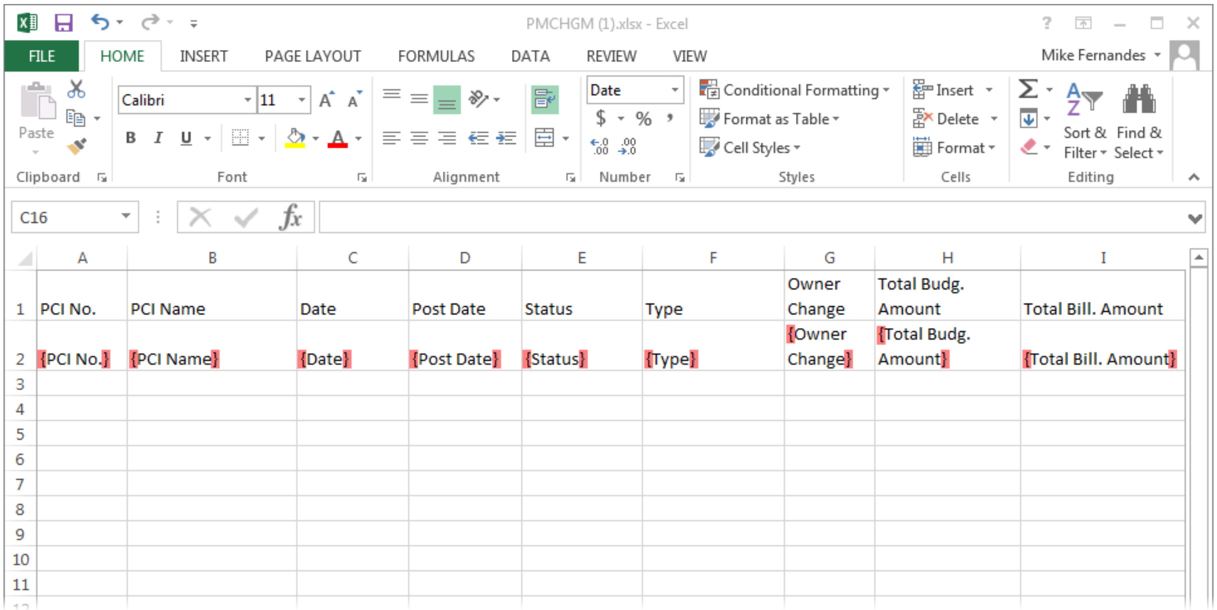
To begin, from the relevant screen, click the [**Send To Spreadsheet**] button to export its data to an Excel document to use as a base for the new template. The resulting Excel document (sample shown below) can now be used as a starting point for the creation of the new MIP Excel Document Template.



	A	B	C	D	E	F	G	H	I
1	PCI No.	PCI Name	Date	Post Date	Status	Type	Owner Change	Total Budg. Amount	Total Bill. Amount
2	EXT0006	PCI Projections	2013-8-15		Pending	External / Owner Change Orders		22500	22500
3	EXT0001	review phase QTY	[illegible]		[illegible]	External / Owner Change Orders		0	0
4	EXT0004	PCI Projection Review	2013-8-15		Pending	External / Owner Change Orders		24000	24000
5	00001	review billing amount	2013-8-21		Pending / Forecast	Budget Overrides		0	0
6	INT00004	review auto calc and save draft	2013-8-21		Pending / Forecast	Internal / Change Order		505	0
7	INT00005	review billing amount	2013-8-21		Pending / Forecast	Internal / Change Order		505	0
8	EXT0008	contract forecast	2013-8-16		Pending / Forecast	External / Owner Change Orders		553744	553744
9	EXT0010	Review the edit function vs answer	2013-9-9		Approved	External / Owner Change Orders		9250.63	9250.63
10	EXT0012	review create change behaviour	2013-9-16		Approved	External / Owner Change Orders		22500	22500
11	INT00002	review markups and billing amount	2013-8-21		Approved	Internal / Change Order		5050	0

Sample of generated Excel Document, which can be used as a starting point for the creation of a new Excel Document Template.

Step 2: Create MIP Excel® Document Template (Merge Template)



MIP Excel Document uses templates of the XLSX or XLSM format. The only difference between these formats is that XLSM allows macros and XLSX does not. If you want the output spreadsheet to automatically recalculate formulas when it loads, you must use the XLSM format and include a startup function as described below.

MIP Excel Document Templates are normal Excel spreadsheets containing static, formatted text and replacement fields that specify which columns in a screen's table the data in columns of the MIP Excel Document come from. In the template, a replacement field is put just under a column header (static, formatted text), and it is of the format ***{column header}***. A replacement field will be replaced by the contents of the exported data from the specified column of the screen's table. The column header values are specified in the Send To Spreadsheet setup in Forms applications (where they default to the prompt on the form or the item name if there is no prompt) or the log definition in JSP applications.

To begin creating the new MIP Excel Document Template, delete all data lines from the exported document in the previous step, leaving only the column headers.

NOTE: The first row of a MIP Excel Document Template cannot be blank.

Next, copy the column headers into the second row. Then, to convert the column headers into replacement fields, enclose the column headers with the **{ }** brace brackets (highlighted in red in above screenshot).

Now that the exported column headers have been used to create the replacement fields, the column headers in the first row, which are just static text, can be formatted in any desired manner.

To ensure that a replacement field results in a string, even though the exported data may be a number, place a single quote directly after the opening brace bracket of the replacement field. For example, if you use numeric vendor codes you would format the replacement field as follows: **{'*vendor code*}**.

If the top left cell (A1) of the template spreadsheet contains the string "**<Form>**" the field definitions may be spread over multiple rows and each exported record will result in a complete page consisting of all of the rows in the template spreadsheet. If you want page breaks between the generated pages you must include one at the end of the template spreadsheet. Note that the row containing the **<Form>** tag is included in the output pages, but the tag is removed. Thus, the top left cell in the output pages cannot contain any information.

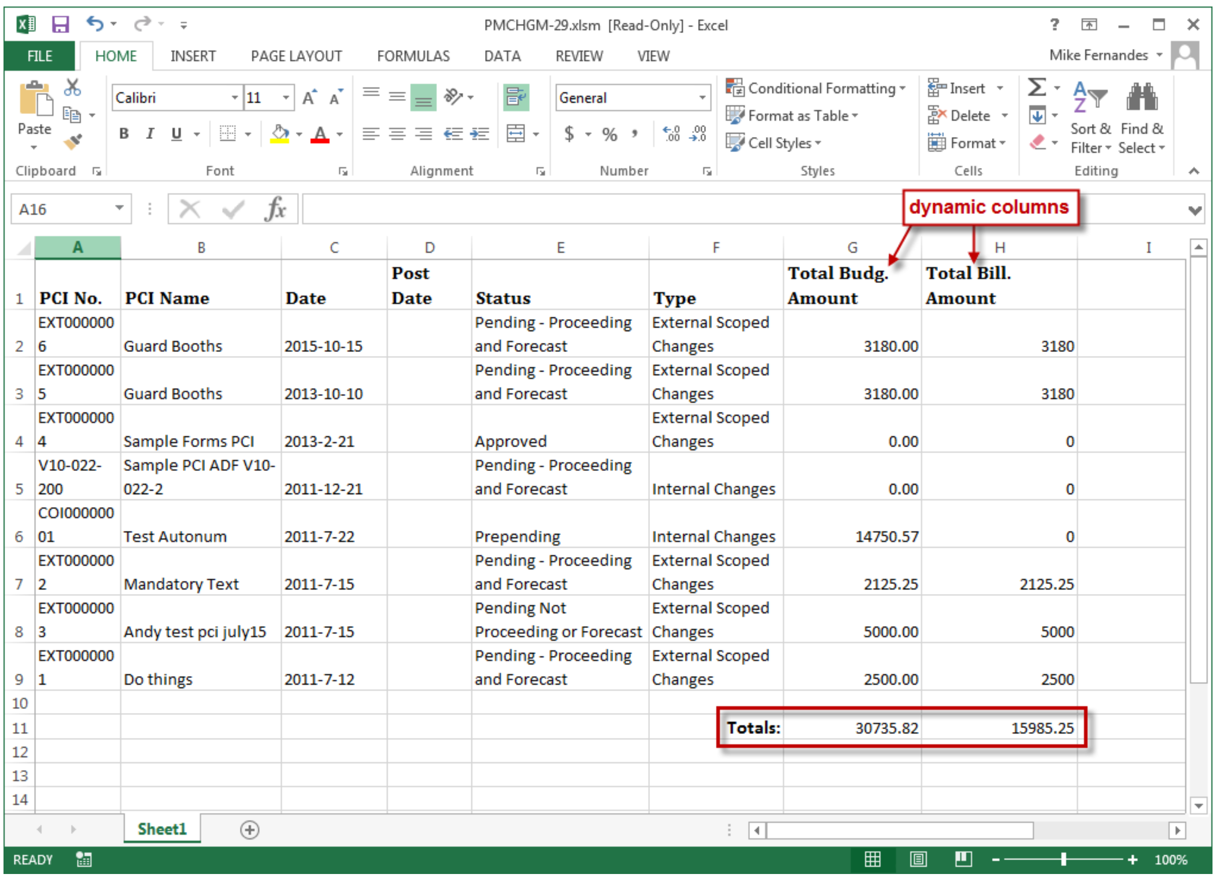
In the absence of the string “<**Form**>” in cell A1, all field definitions must appear in a single row, called the Model row”. This row will be replicated for each exported record, resulting in a tabular display of exported data.

Formulas will work in the output spreadsheet, although they may result in errors in the template because they depend on having numeric inputs and the field tags are strings. The get a sum of the rows define its range to be the column title to the field definition.

Normally you would need to force the spreadsheet to recalculate formulas, such as totals, using **CTRL+SHIFT+ALT+F9** when it comes up in Excel. However, it is possible to make this recalculation happen automatically if the template is in XLSM format. To do this, define the required startup function in the spreadsheet using the Visual Basic Editor (**Alt-F11**).

Dates normally are exported as strings and added to the output spreadsheet as strings, so it is not possible to format them. However, with the use of hidden columns and formulas it is possible to convert a date to a number (the internal representation of dates in Excel) and then format it. For example, if F2 contains the merged date as a string, the formula =IF(F2="","",F2+0) in another cell in that row will contain the date as a number, which can be formatted as a date.

Add Totals to Dynamic Columns



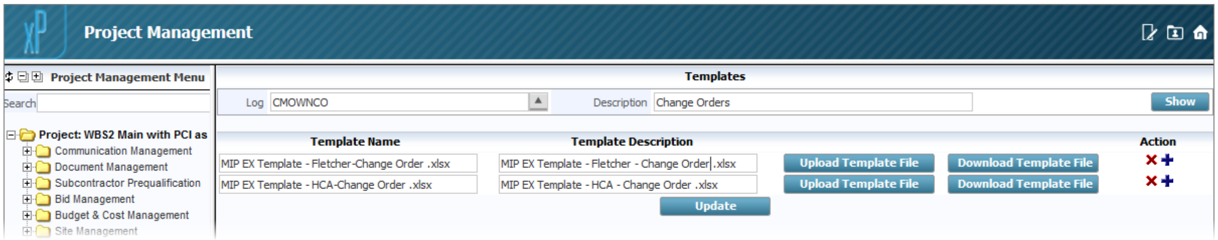
	A	B	C	D	E	F	G	H
1	PCI No.	PCI Name	Date	Post Date	Status	Type	Total Budg. Amount	Total Bill. Amount
2	EXT0000006	Guard Booths	2015-10-15		Pending - Proceeding and Forecast	External Scoped Changes	3180.00	3180
3	EXT0000005	Guard Booths	2013-10-10		Pending - Proceeding and Forecast	External Scoped Changes	3180.00	3180
4	EXT0000004	Sample Forms PCI	2013-2-21		Approved	External Scoped Changes	0.00	0
5	V10-022-200	Sample PCI ADF V10-022-2	2011-12-21		Pending - Proceeding and Forecast	Internal Changes	0.00	0
6	COI00000001	Test Autonum	2011-7-22		Prepending	Internal Changes	14750.57	0
7	EXT0000002	Mandatory Text	2011-7-15		Pending - Proceeding and Forecast	External Scoped Changes	2125.25	2125.25
8	EXT0000003	Andy test pci july15	2011-7-15		Pending Not Proceeding or Forecast	External Scoped Changes	5000.00	5000
9	EXT0000001	Do things	2011-7-12		Pending - Proceeding and Forecast	External Scoped Changes	2500.00	2500
10								
11						Totals:	30735.82	15985.25
12								
13								
14								

Sample of generated MIP Excel Document with totals at end of dynamic columns.

To add totals to the end of dynamic columns requires the creation and use of a macro, because no formulas can be in these columns to calculate the totals dynamically. Since dynamic columns must be clear of all entries in order to calculate the totals dynamically, a macro is needed to put the totals into these columns.

To create the macro requires the use of VBA, which is launched from the MIP Excel Template. For further details, please refer to the *Add Totals to Dynamic Columns* sub-section under the Frequently Asked Questions sections at the end of this user guide.

Step 3: Upload New MIP Excel® Template for New MIP Excel Document



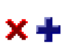
*Sample of Excel Merge Maintenance screen (standard Treeview path: **Project Management** > **File Maintenance** > **Document Merge** > **Excel Merge Maintenance**)*

Having saved the new MIP Excel Document Template created in the previous step, it can then be upload it into the system so that it can be used to generate the new MIP Excel Document. This step links the MIP Excel Template with the Log/Report Type selected for the **Log** field.

For each Log Type, multiple MIP Excel Template variants may be associated to it (two templates are associated to Log Type shown in above screenshot). When going to print the MIP Document, the relevant template can then be selected. The paths to the screens to maintain Log Types and their data sources is provided below, under the section, *Maintenance Screen for Log Types & Log Type's Datasource*.

This screen is also used to download a MIP Template in order to use it as an alternative starting point (alternative to Step 1) to create a new variant of the template. See the description for the [**Download Template File**] button in the below table.

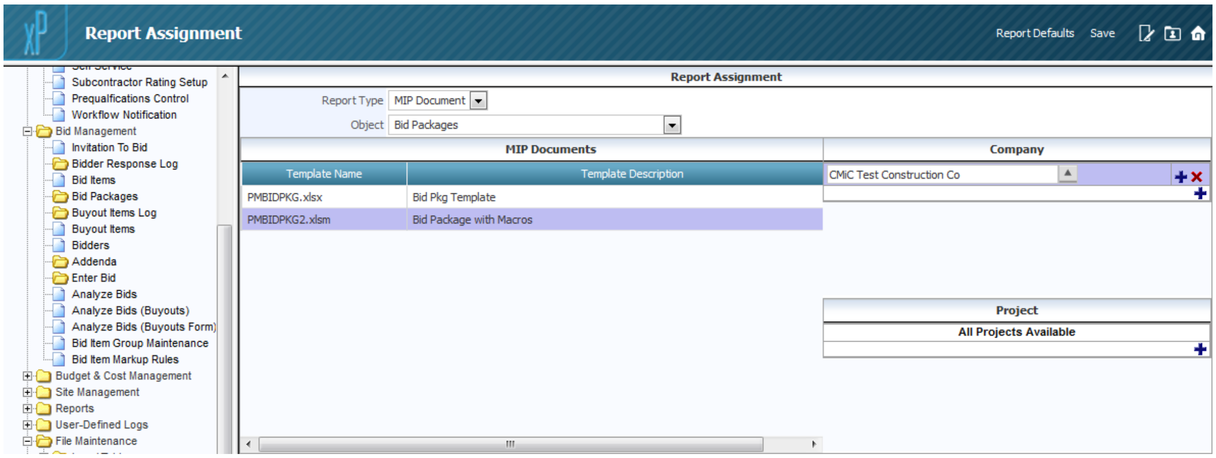
The following table provides details about the fields and buttons on this screen:

Field / Button	Description
Log	Select the relevant Log Type for the new MIP Excel Template to upload.
Description	Display only field, displaying description of selected Log Type.
Template Name	Display only field, displaying file name of DOCX MIP Excel Template file.
Template Description	Identifies the MIP Excel Template in the system. After a template is uploaded, this field can be used to change the templates description.
Upload Template File	Used to browse for and select the MIP Excel Template to upload. Once uploaded, the **Template Description** field, which identifies the template in the system, can be changed if desired.
Download Template File	Used to download an Excel Template in order to use it as a starting point for the creation of a variant version of it.
	Used to associate a new MIP Excel Template to the selected Log Type, or to disassociate a template from the Log type.
Update	Click to update any changes.

Maintenance Screen for Log Types & Log Type's Datasource

Maintenance	Standard Treeview Path
Log Types	Project Management > File Maintenance > User-Defined Logs
Log Type's Datasource	Project Management > File Maintenance > User-Defined Logs Types

Step 4: Restrict MIP Template Availability by Company & Project



Sample of Report Assignment screen (standard Treeview path: PM > File Maintenance > Report Assignment)

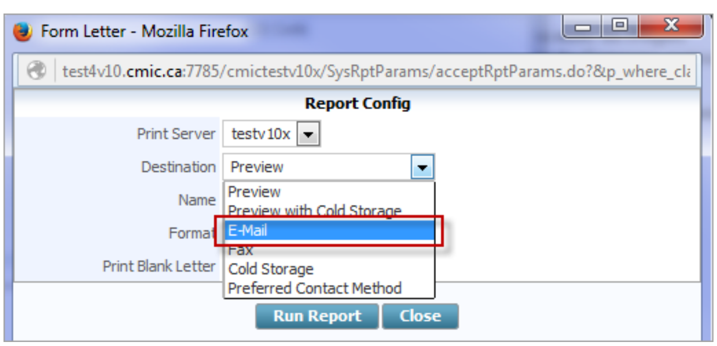
When a MIP Excel Template is uploaded and associated to a particular Log/Report Type, it is available to all Companies in the system, for that Log/Report Type. If necessary, the Report Assignment screen, shown above, can be used to restrict the availability of the MIP Excel Template to particular Companies, and optionally, to particular Projects.

To restrict the availability of a MIP Excel Template by Company, for the **Report Type** field, select **MIP Document**, then using the **Object** field, select the Log/Report Type of the MIP Excel Document.

Under the **MIP Documents** section, the MIP Document Templates for the selected Log/Report Type will be listed. Select the template to configure, and under the **Company** section, if the template is available to all companies, it will read "All Companies Available", otherwise the companies which have access to the template will be listed. Click to add a Company to the list, or to remove a Company from the list.

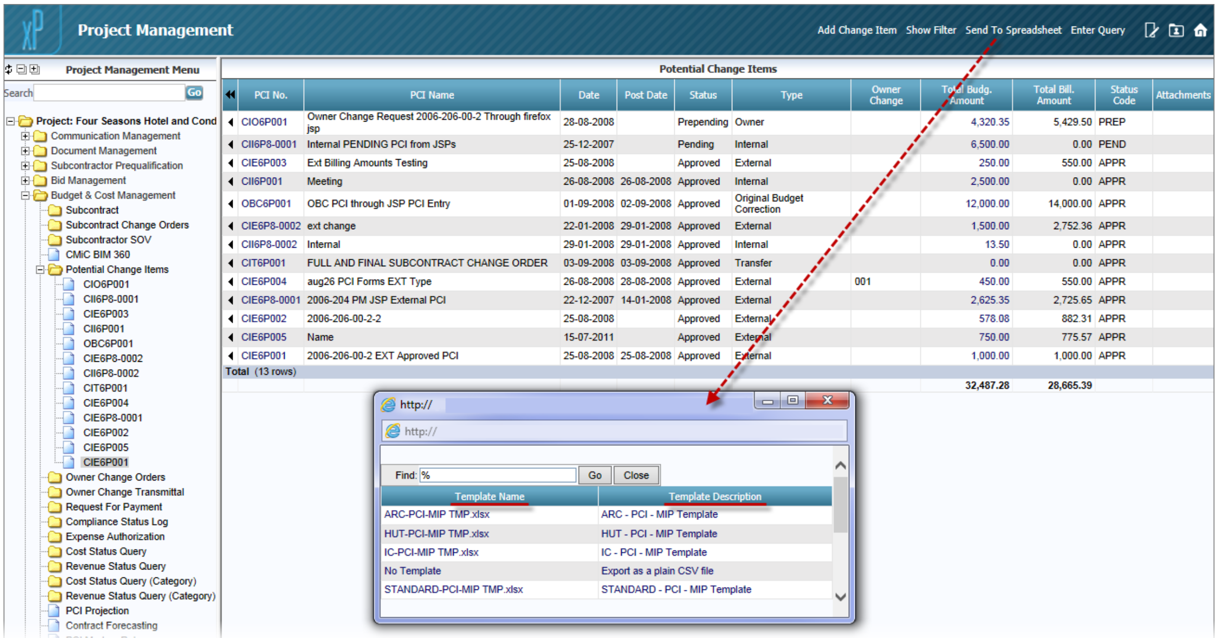
To further restrict the availability of the template, to particular Projects, click the icon under the **Project** section to add desired Projects (NOTE: if the icon is unavailable, click the icon under the **Company** section, and it will appear). Click to remove a Project from the list.

Set Subject & Body Defaults for E-Mail



This screen is also used to set the defaults for an e-mail's subject line and body, so that when printing a MIP Document and using the **E-Mail** option from the pop-up's **Destination** field (shown above), the defaults are filled in. Please refer to the *Email Replacement Parameters* sub-section of the *Reports and Form Letter Assignment* section in the xProjects user guide for further details.

Step 5: Printing Using MIP Excel® Template

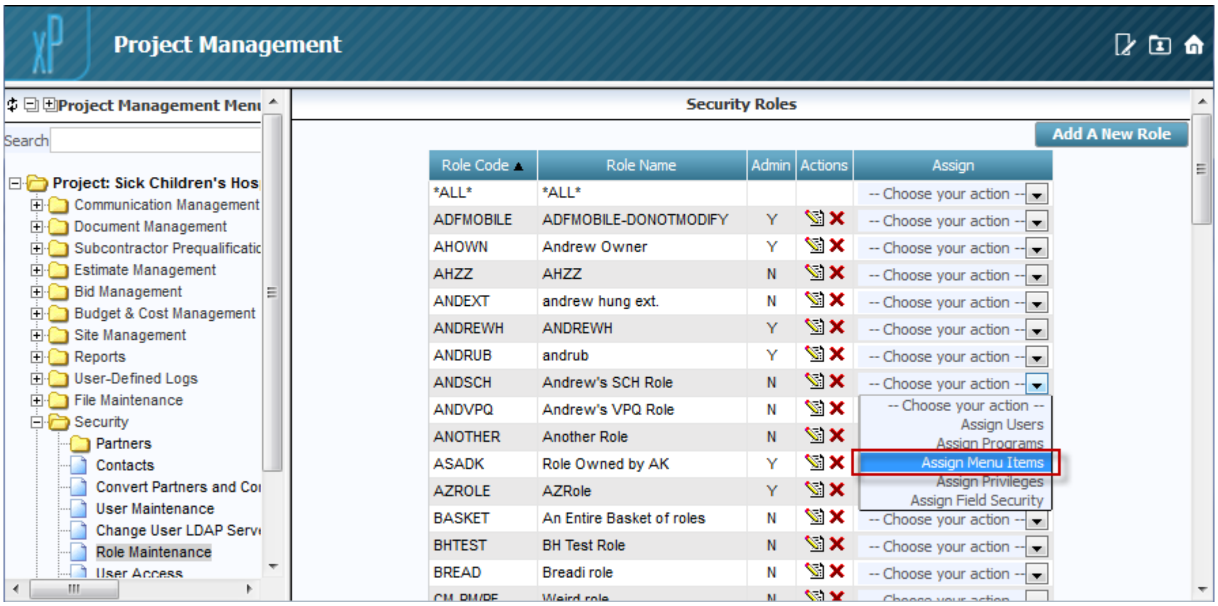


After a MIP Excel Template has been upload and associated to a Log/Report Type, it can be used to print the new MIP Excel Document from the screen used to print reports/logs for the associated Log/Report Type. One such screen is the Potential Change Items screen, shown above, and when its [**Send To Spreadsheet**] button is clicked, a pop-up is launched to select the template to use to generate the MIP Excel Document.

The **No Template** option, under the **Template Name** column, is hidden or displayed using the **Hide No Template Option For Excel Merge** flag on the **Report** tab of the System Options screen (standard Treeview Path: System > Setup > System Options).

Integration with Microsoft Outlook®

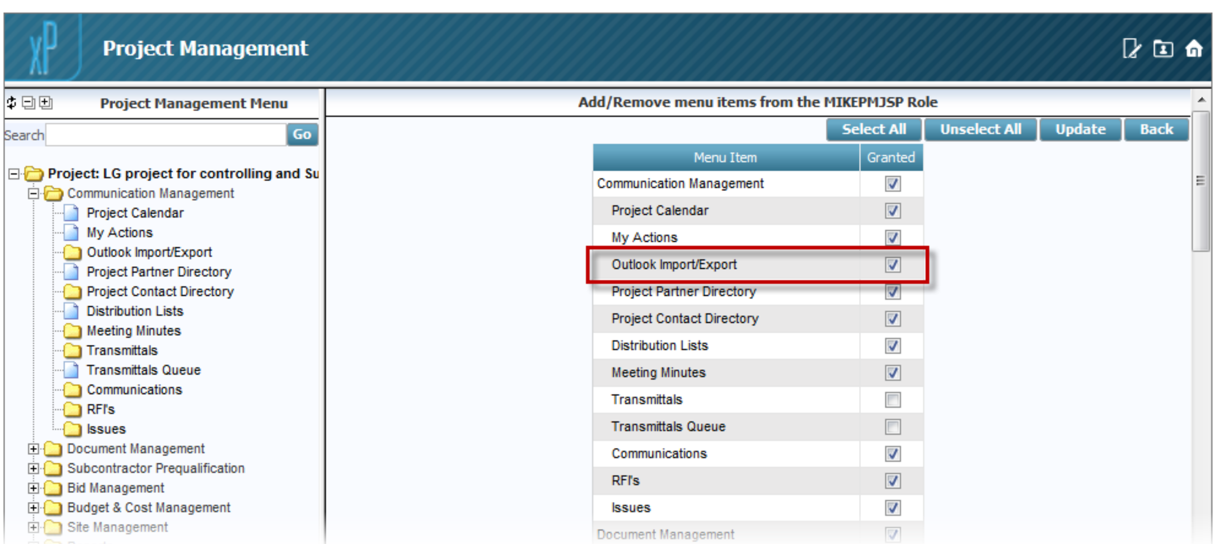
Security Setup for Outlook® Import & Export



Sample of Role Maintenance screen (standard Treeview path: ***PM*** *>* ***Security*** *>* ***Role Maintenance****)*

For a user to access the import and export functionality for Outlook, the user's security role must be granted the rights to do so. This is done through the Role Maintenance screen, shown above.

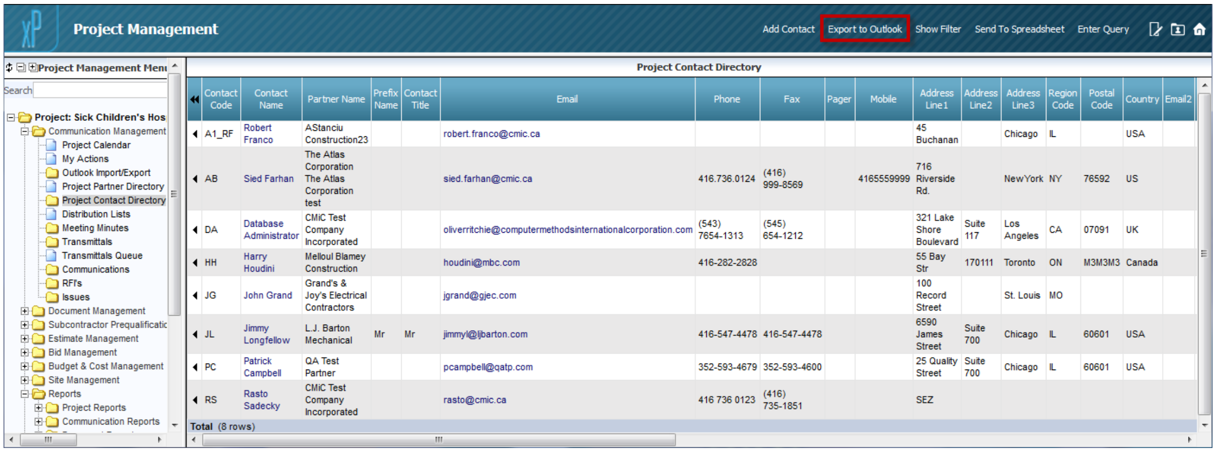
To grant a security role rights to this functionality, click the drop-down arrow in the **Assign** column of the relevant role, then select **Assign Menu Items** (framed in red).



On the next screen, ensure that the rights to the Outlook Import/Export menu item are granted.

Microsoft Integration for Outlook® Contacts

Project Contacts Export to Outlook® – PM



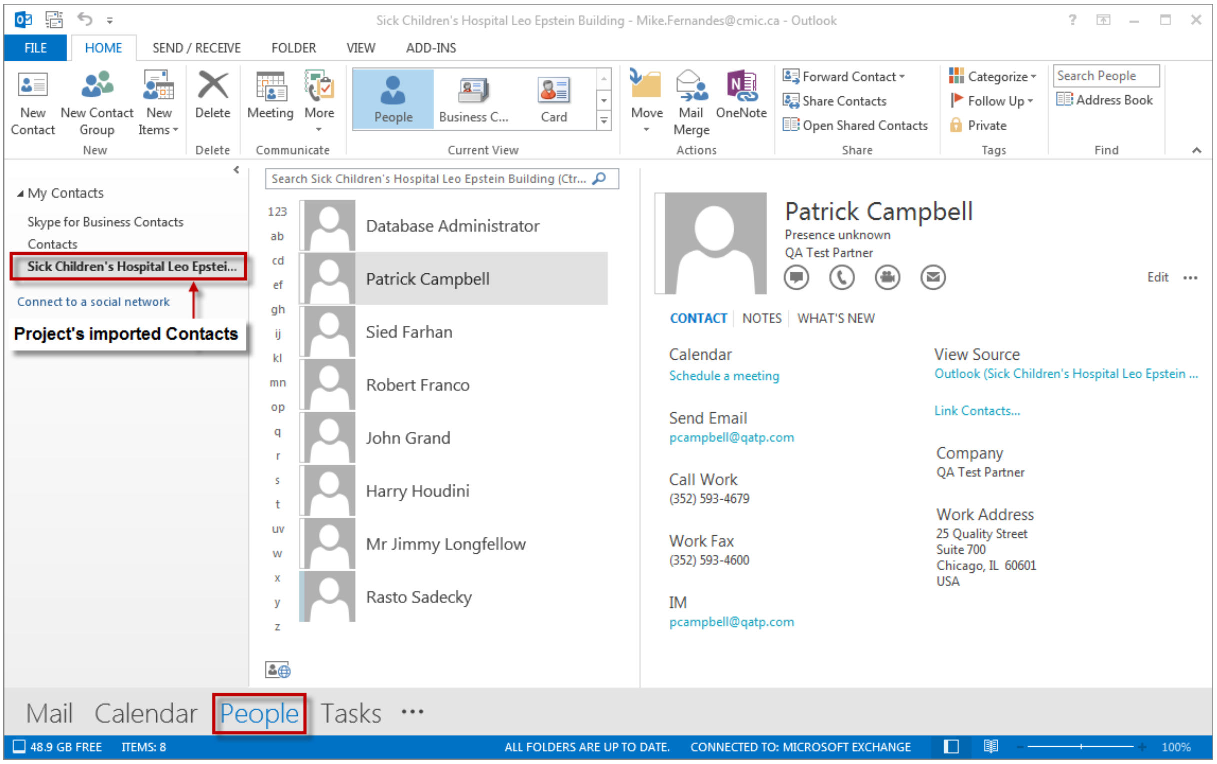
*Sample of Project Contact Directory screen (standard Treeview path: **PM** > **Communication Management** > **Project Contact Directory**)*

A project's contacts are exported to Outlook via the Project Contact Directory screen, shown above. To export the contacts via this screen, click its [**Export to Outlook**] button.

Along the top, a message will ask if you would like to export all displayed contacts or only the contacts changed since the last upload. Select the desired option and click [**Proceed**].

A pop-up will appear asking you if you would like to open or save a SysOutlookInterface.jsp file. Choose to open it, with Java Web Start Launcher, then on the following pop-up, click [**Run**].

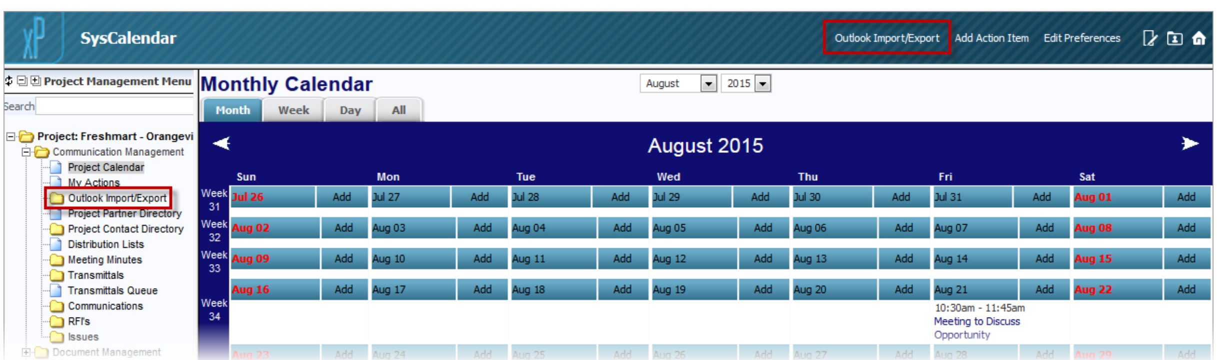
Another pop-up will appear, showing the progress of the importing of contacts into Outlook. Once finished, the pop-up will allow you to view the details of the import or to close the pop-up.



Sample of People (Contacts) tab of Outlook, and a Project's imported Contacts.

After a project's contacts have been imported, they can be view on the **People** tab of Outlook, as shown above.

Microsoft® Integration Package for Outlook® Calendars



*Sample of Project Calendar screen of PM module (standard Treeview path: **PM > Communication Management > Project Calendar**)*

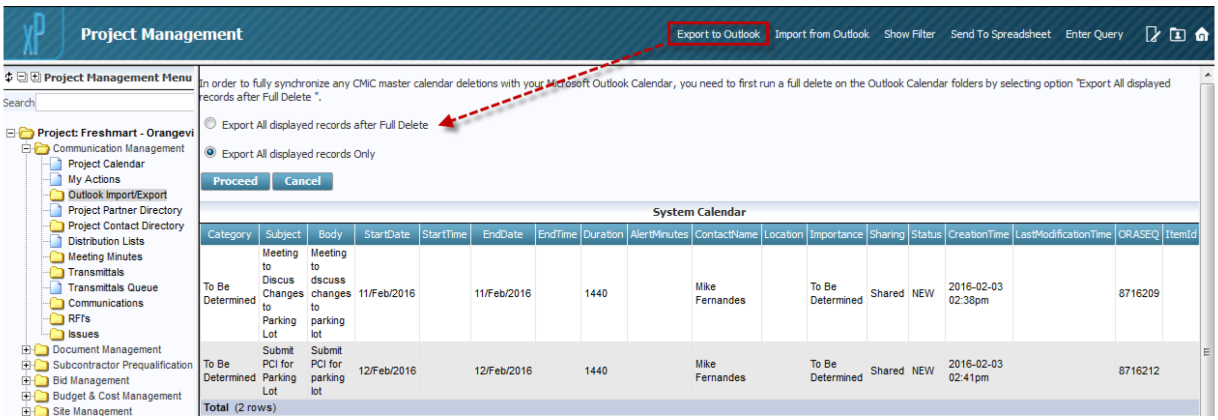
The Microsoft Integration Package allows two-way transfers of Action Items between Outlook and the Calendars used by the Project Management (PMJSP) and Opportunity Management modules. Entry of new items can be done through either CMiC or Outlook, and the import and export options can be used to keep the various calendars synchronized.

This functionality is utilized via the [**Export to Outlook**] option on the top of the screen displaying the calendar (shown above), or the **Outlook Import/Export** Treeview menu option, framed in the Treeview area of the above screenshot.

As with the Contacts exports to Outlook, certain fields must be active in the Outlook Import/Export log in order to complete the transfers. If the Action Types in CMiC Calendar match the Outlook Category codes, the Outlook Calendar will retain the defined color coding used in Outlook. If the Outlook Items do not belong to a Category, or belong to Multiple Categories or a single Category that is not matched in the CMiC Action Types, then the imported Outlook Items will be identified in the CMiC Calendar with the type of 'Outlook Item'.

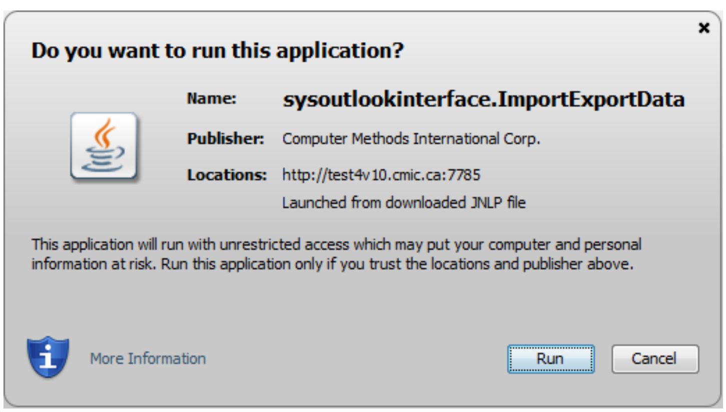
When copying the data in either direction, only FUTURE events will be included. If the event is in the past (this is done by checking the current date/time), whether the item is completed or not, the item will not be copied. Recurring events will be identified in the logging of items to show the recurrence numbers, as in fact they are single items at the database level.

Calendar Export to Outlook®



The Export Calendar Log shows only items in the future (past items are not exportable) and shows in its own new log. Using the filters or query modes will allow specification of the items to be exported.

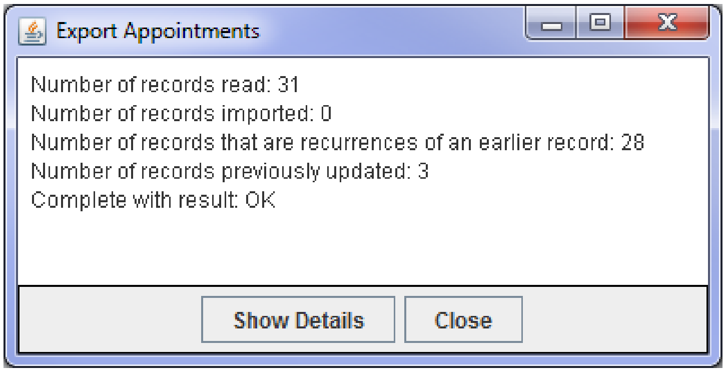
To export, click [**Export to Outlook**]. Along the top, shown above, a message will ask if you would like to export all displayed contacts or only the contacts changed since the last upload. Select the desired option and click [**Proceed**]. On the following pop-up, shown below, click [**Run**].



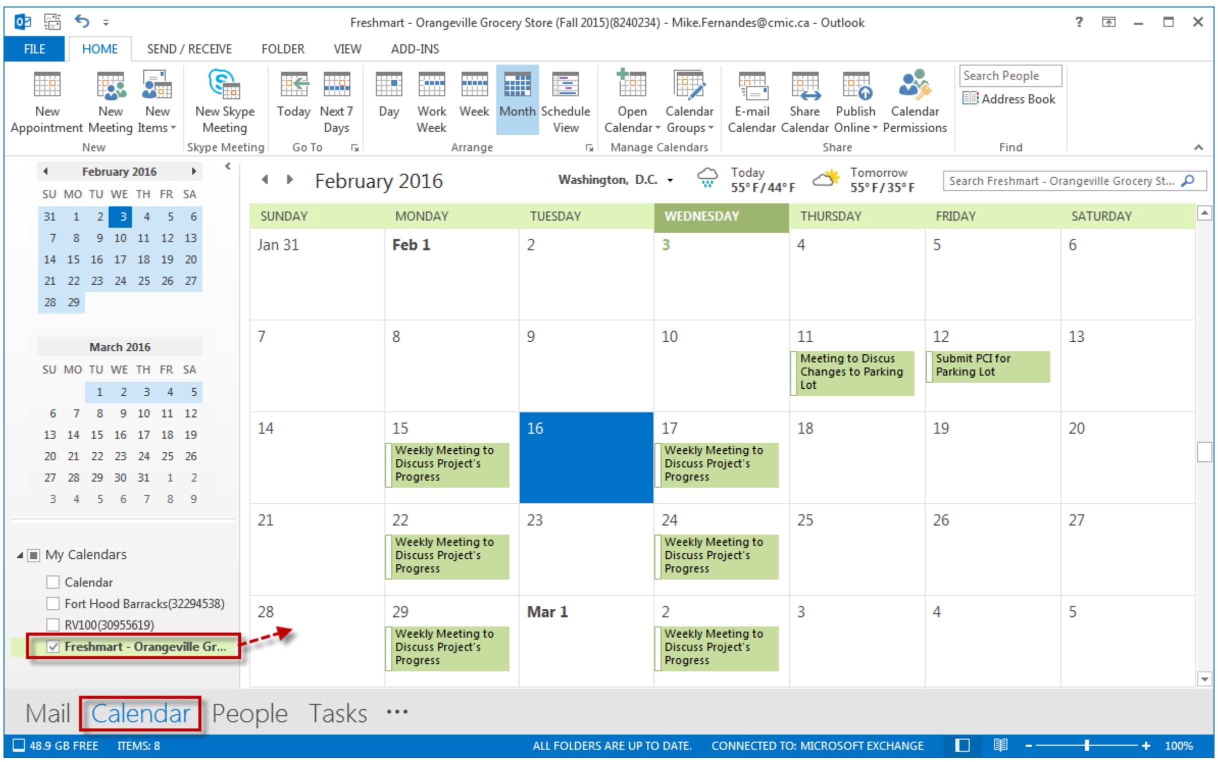
Along the top, a message a prompt will ask if you would like to export all displayed contacts or only the contacts changed since the last upload. Select the desired option and click [**Proceed**].

A pop-up will appear asking you if you would like to open or save a SysOutlookInterface.jsp file. Choose to open it, with Java Web Start Launcher, then on the following pop-up, click [**Run**].

Another pop-up will appear, showing the progress of the importing of contacts into Outlook. Once finished, the pop-up will allow you to view the details of the import or to close the pop-up, as shown below.

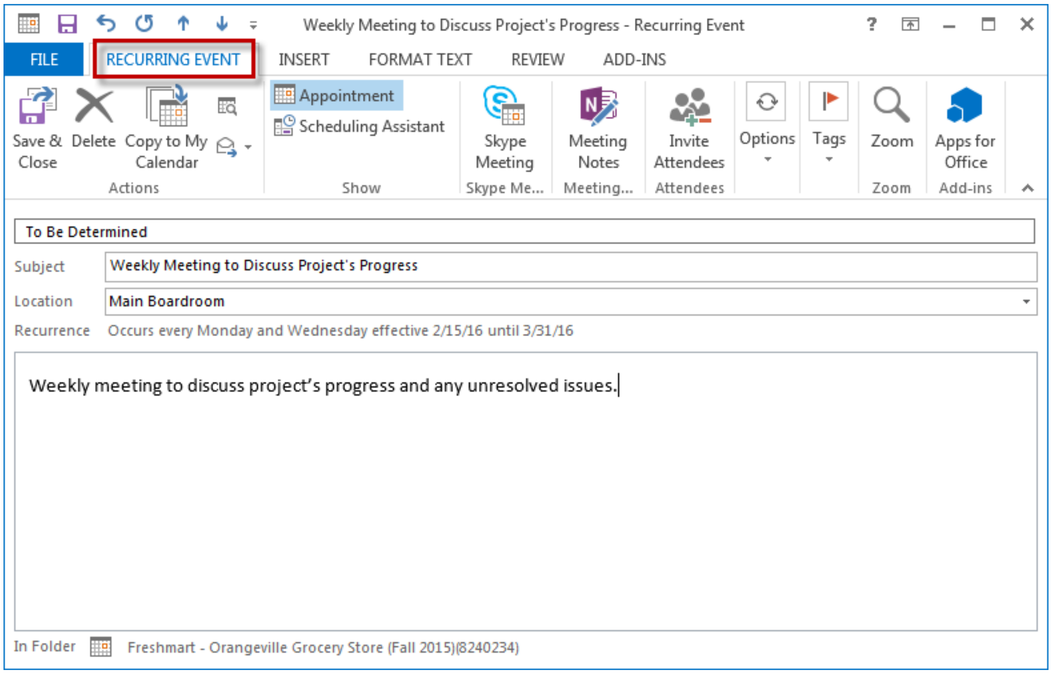


In this sample log, there were recurring events in the calendar. Just as entered in the Project Calendar, or as would be done in Outlook, a recurring event is actually a single item (number of records imported counts) with multiple occurrences (number of records that are recurrences count). A detail version is shown by clicking the [**Show Details**] option.

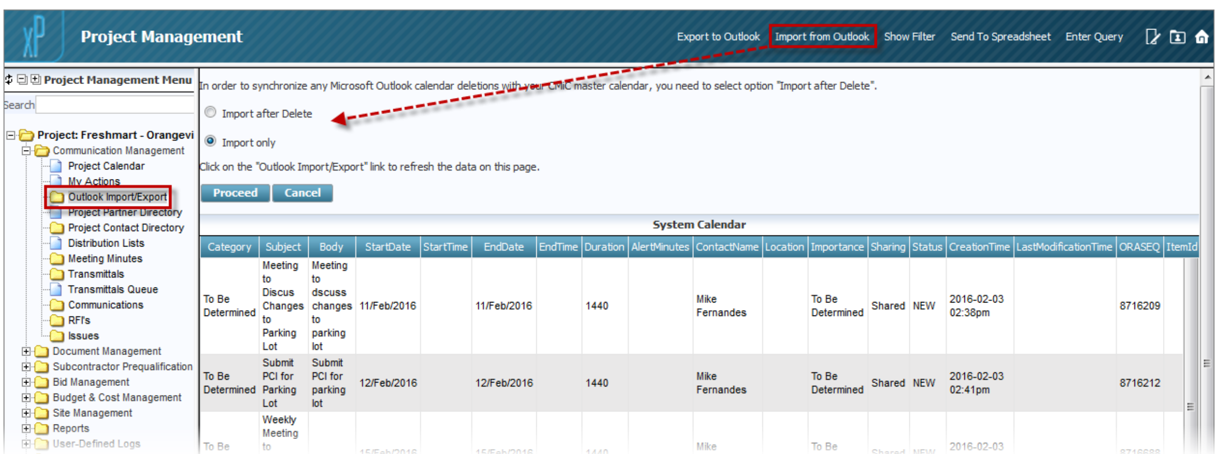


The Project's Action Items will be imported into Outlook, for a calendar named after the Project, as shown in the above screenshot.

In Outlook, recurring items become recurring events. When going to view the details of a recurring item (event), a prompt will ask you if you would like to view just the selected instance of the item or if you would like to open the entire series. Below is an example of the details for a recurring event in Outlook.

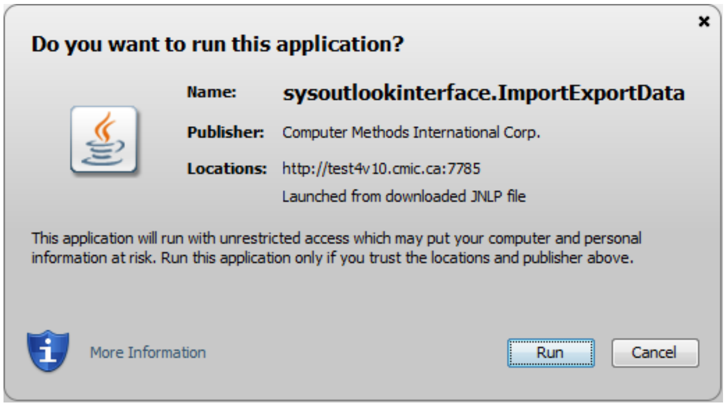


Calendar Import from Outlook®



With an original Calendar created in Outlook through the [**Export to Outlook**] option, there will be a calendar in Outlook setup by the export that will contain the required keys for import synchronization with the Calendars in CMiC.

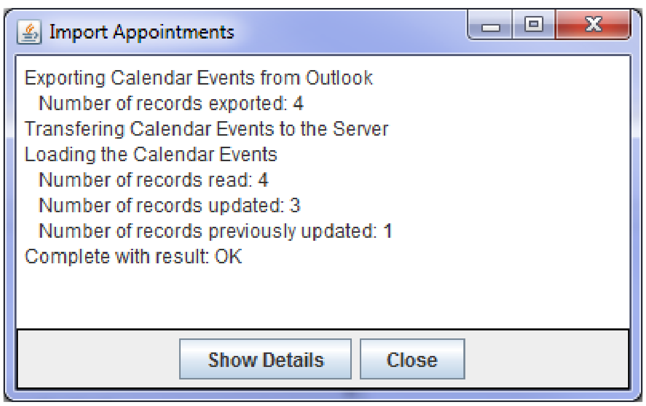
To import items for Outlook's calendar, have Outlook running and click [**Export to Outlook**] on the top of the screen displaying the calendar (shown above), or the **Outlook Import/Export** Treeview menu option, framed in the Treeview area of the above screenshot. Along the top, shown above, a message will ask if you would like the import function to synchronize any deleted items. Select the desired option and click [**Proceed**]. On the following pop-up, shown below, click [**Run**].



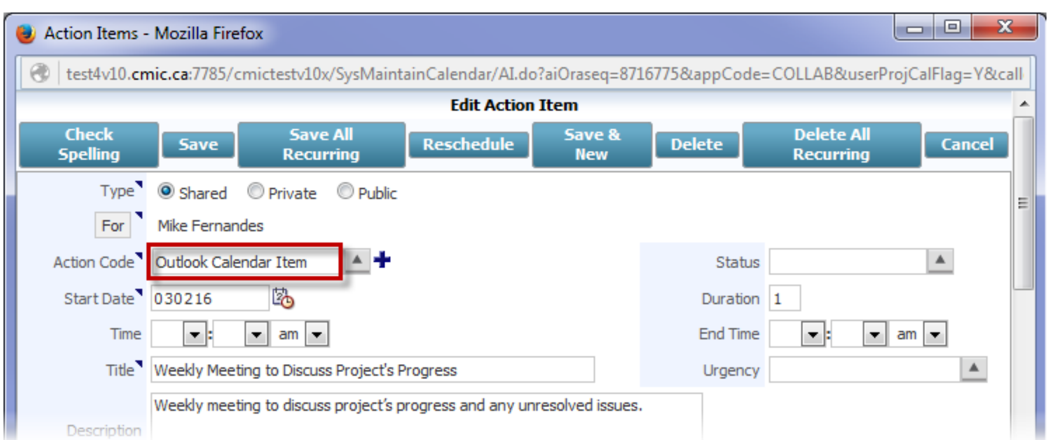
Along the top, a message a prompt will ask if you would like to export all displayed contacts or only the contacts changed since the last upload. Select the desired option and click [**Proceed**].

A pop-up will appear asking you if you would like to open or save a SysOutlookInterface.jsp file. Choose to open it, with Java Web Start Launcher, then on the following pop-up, click [**Run**].

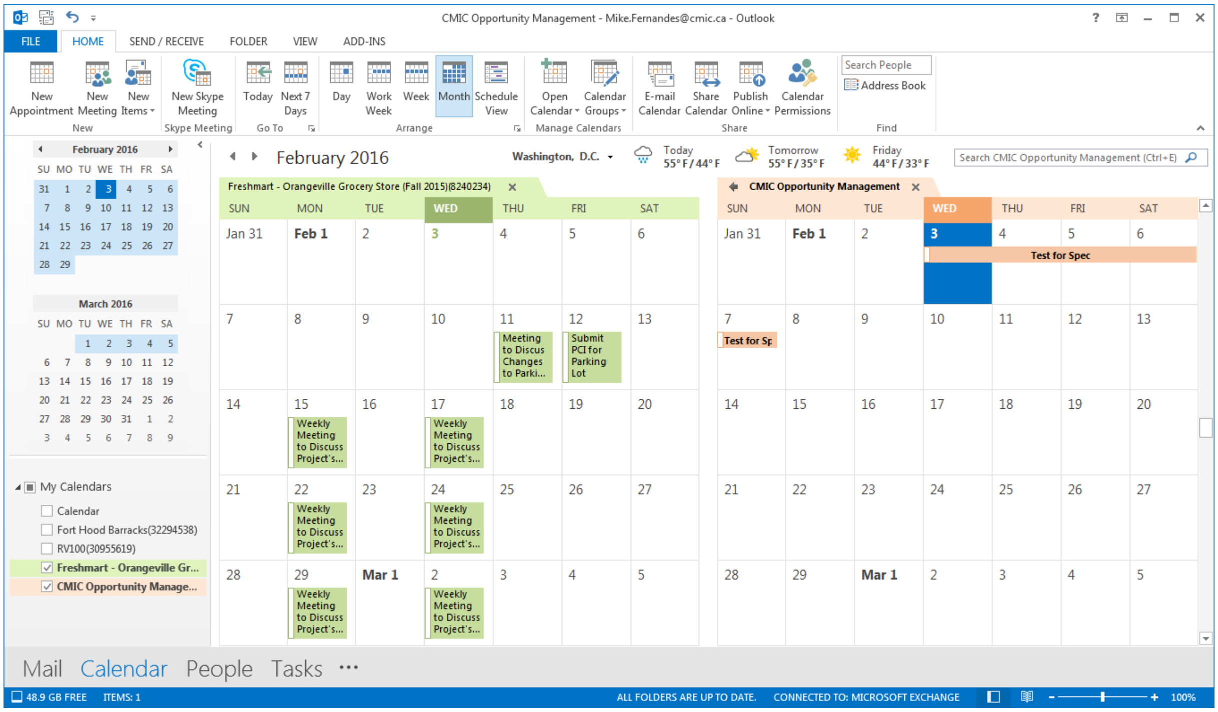
Once completed, the following confirmation dialog will appear showing any errors (if they occur) and the items transferred.



If the category of the Outlook item can be matched to the corresponding Action Item's Action Code, such as "Meeting", the Action Code will be preserved, otherwise the Action Code for the Action Item will read "Outlook Calendar Item", as shown in the below screenshot.



OM Calendars vs PM Calendars



The above screenshot shows the OM Calendar and a Calendar for a single Project Calendar that have been exported from CMiC.

Items in a CMiC Calendar that are associated to a Project are exported to the corresponding Project Calendar in Outlook, while items that have no specific Project will be exported to the OM Calendar.

Frequently Asked Questions

General Questions

Will it work with all CMiC modules?

MIP Word and Excel® integration is available in CMiC Forms (Enterprise) regardless of the application, but a View to support the document may be required.

Is Office 2007 required only to create the docx/xlsx files? That is, can I create the files in 2007 and still allow those with Office 2003 (with the compatibility pack) to run/view the documents?

Yes. While Office 2007 or later versions is recommended, the compatibility pack will still allow users to create and view a document running Office 2003.

NOTE: In order to edit or view the DOCX/XLSX/XLSM files using MS Office® 97, XP, or 2003 it is necessary to install the free Microsoft Office® Compatibility Pack for Word®, Excel®, and PowerPoint® 2007 File Formats plug-in. Instructions for doing so can be found at the following URL:

http://www.microsoft.com/downloads/details.aspx?FamilyId=941B3470-3AE9-4AEE-8F43-C6BB74CD1466&displaylang=en

The actual plug-in installation file can be down-loaded from this site – **FileFormatConverters.exe**.

What are the future plans for MIP in relation to Enterprise, will the feature be available as a full replacement of Form Letters?

There are no current plans for a complete replacement. Form Letters is still required as the back end for Word document development. There are things that Form Letters can do that MIP currently cannot do (e.g. true Form Letters sent to multiple recipients with each recipient's name and address in the heading).

What is the price of MIP?

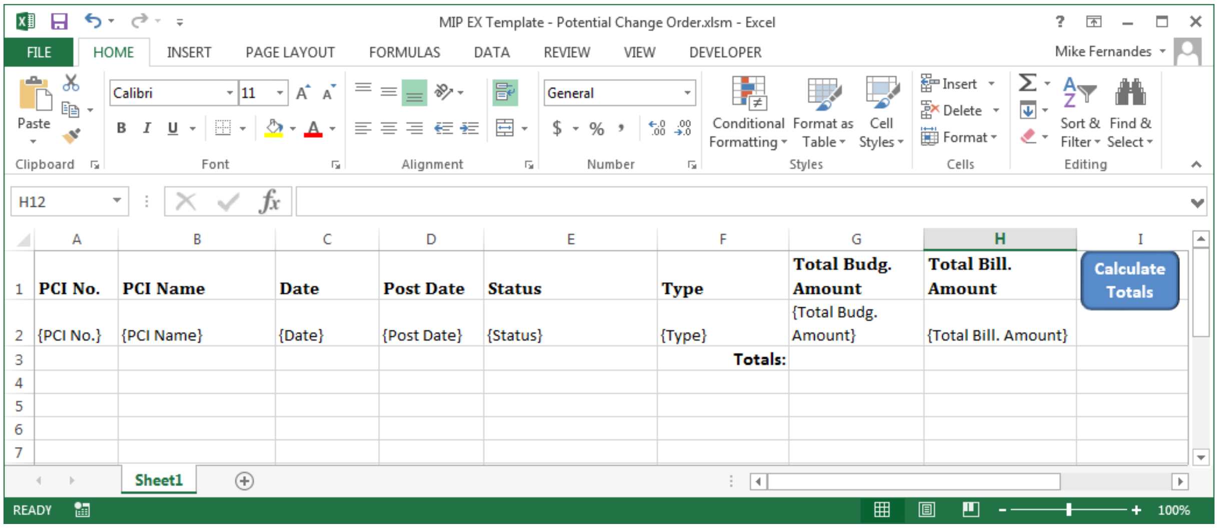
Please contact your Sales Executive (or sales@cmic.ca) to discuss price and available payment options.

Does CMiC provide any literature or training on Microsoft® Security for exporting to Word®/Excel®, or are we responsible for obtaining that on our own?

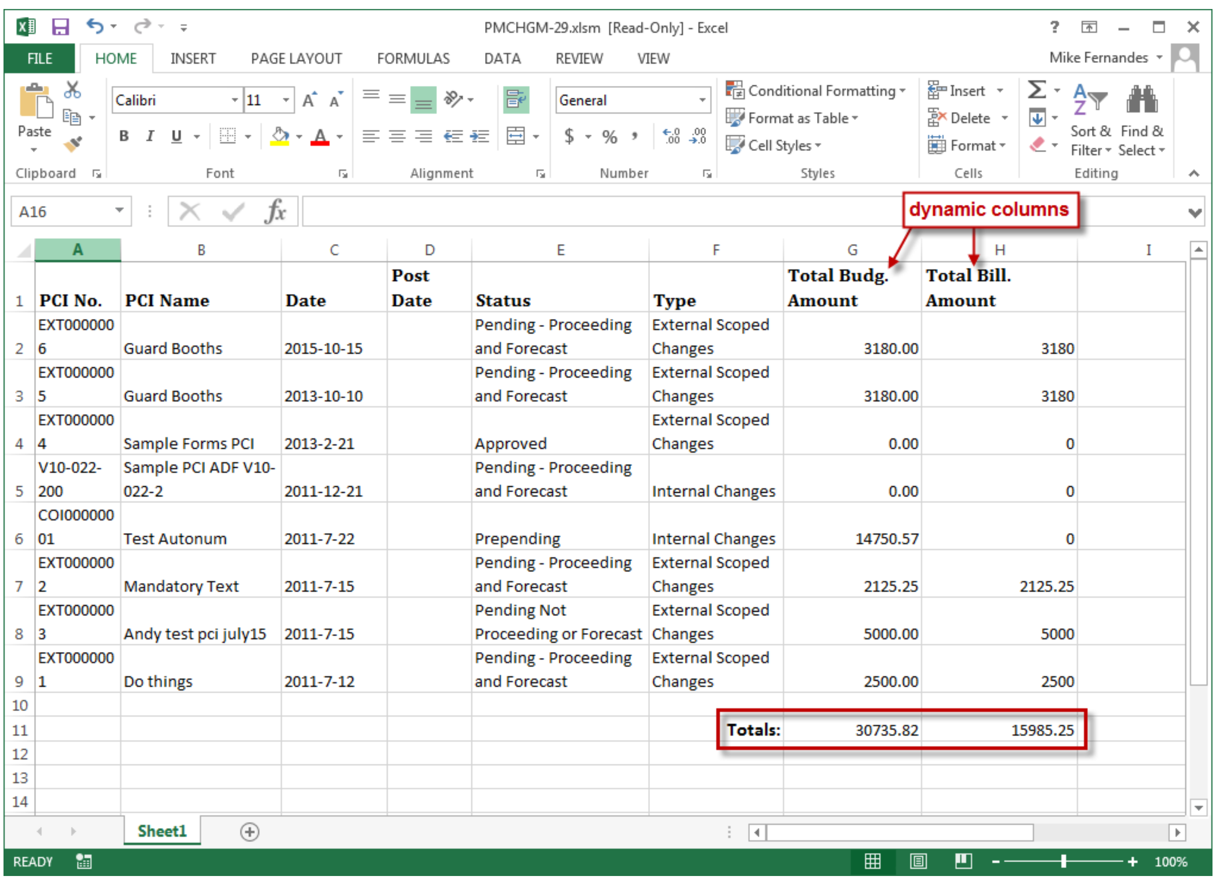
This information is only documented and supported within the applicable Microsoft® products.

MIP Excel Documents

Add Totals to Dynamic Columns



Sample of MIP Excel Template, which generated MIP Excel Document shown in next screenshot.



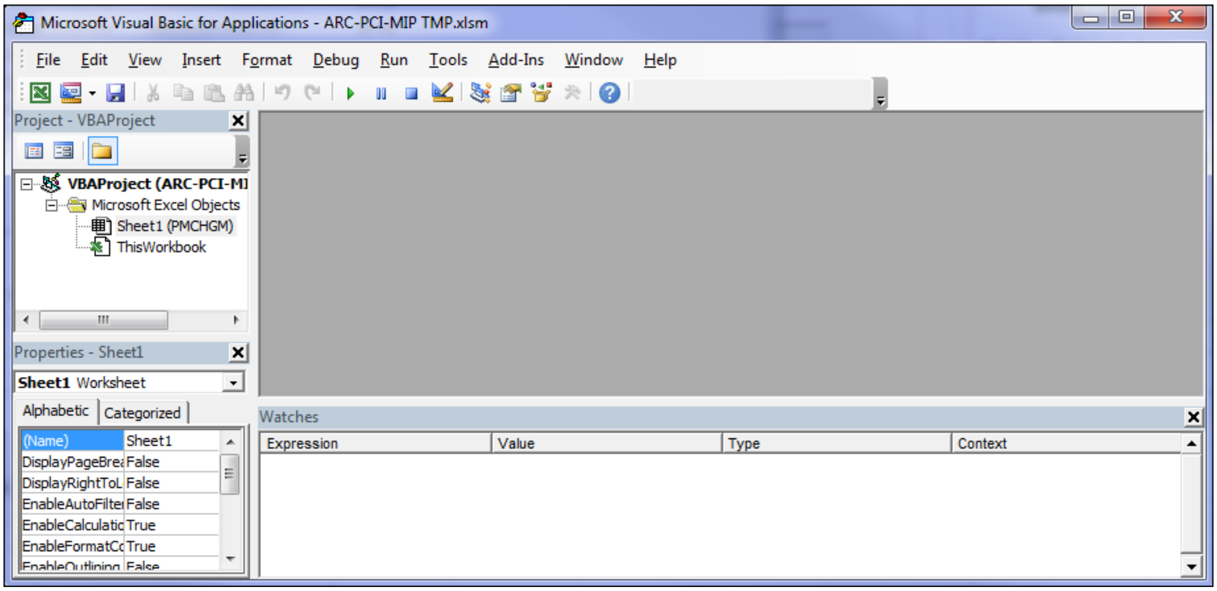
Sample of generated MIP Excel Document with totals at end of dynamic columns.

This FAQ shows how to set up a MIP Excel Document Template, using the simplest method possible, so that totals are added to the end of dynamic columns when the MIP Excel Documents is generated (shown above). This is done by creating a macro via Microsoft Visual Basic for Applications (VBA).

It is necessary to create a macro to calculate and display the totals for dynamic columns because no formulas can be in these columns to calculate the totals dynamically. The dynamic columns must be clear of all entries in order to calculate the totals dynamically, so a macro is needed to put the totals into these columns.

Also, to avoid issues with event handling in VBA, a button is used to run the macro that calculates and displays the totals.

Step 1: Open MIP Excel Template & Launch VBA

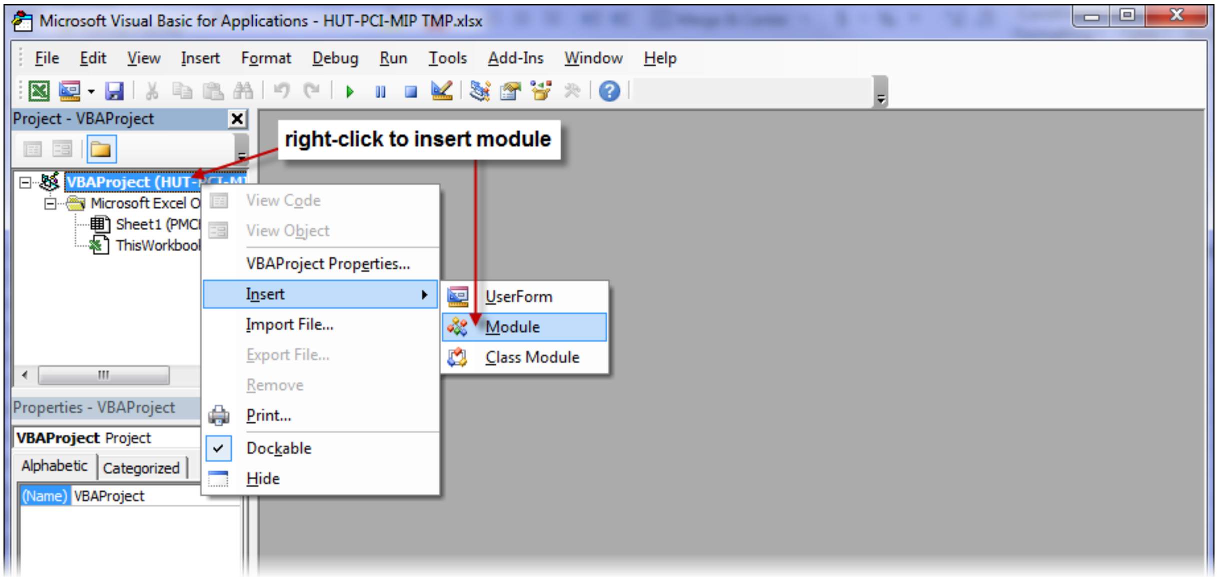


*Sample of VBA application launched after pressing **Ctrl+F11** keyboard keys from MIP Excel Template.*

The first step to add totals to the end of dynamic columns is to launch VBA from the MIP Excel Template by pressing the **Ctrl** and **F11** keyboard keys together. VBA will display the project associated to the template.

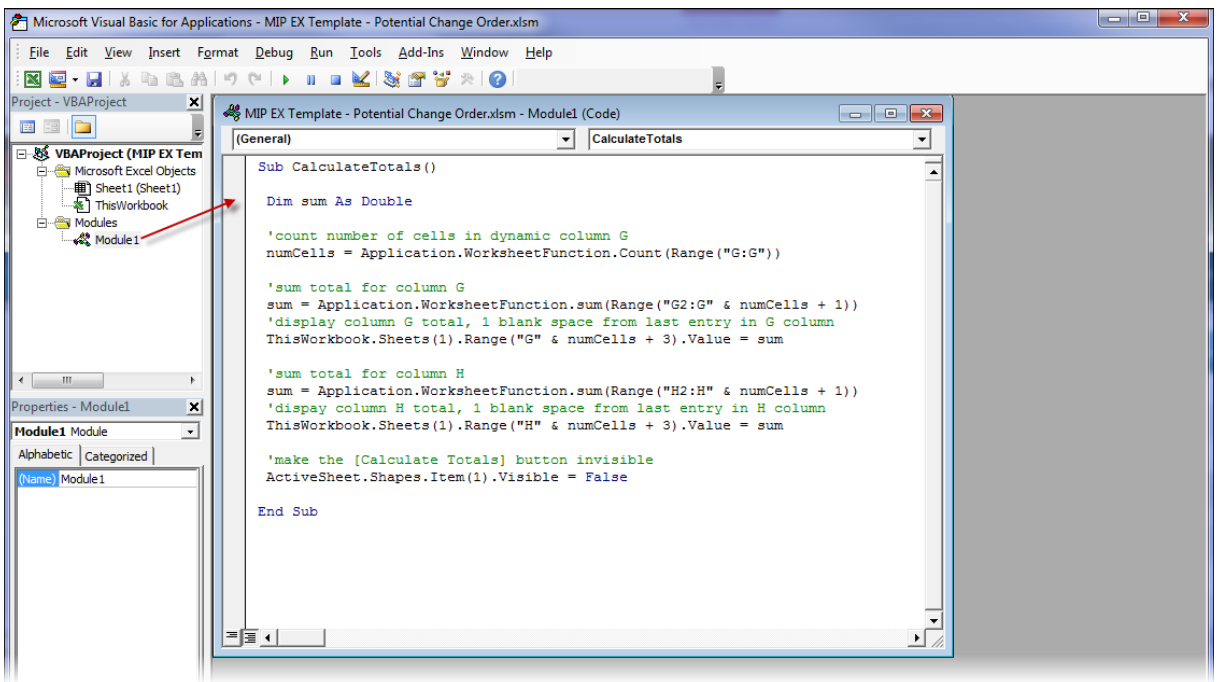
NOTE: To add totals to the end of dynamic columns requires the use of a macro, so the MIP Excel Template must have been saved as an **XLSM** Excel file (supports macros).

Step 2: Add New Module to VBA Project



In this step, a module is added to the VBA Project associated to the spreadsheet, so that a macro (also known as a sub-procedure) to calculate and display the totals can be added to it. As shown in the above screenshot, right-click the VBA Project node, select **Insert**, then **Module**.

Step 3: Add Macro to New Module



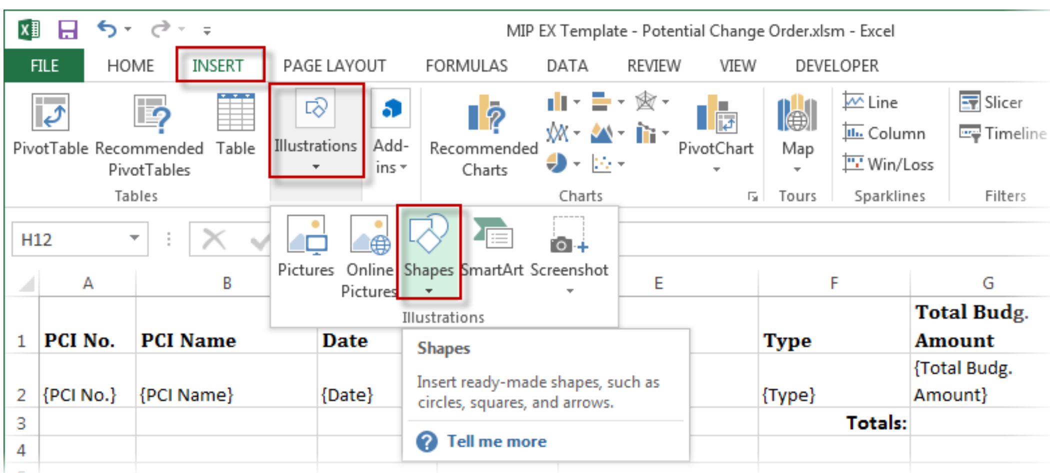
In this step, the macro (sub-procedure) is added to the new module. This is the last step involving VBA. The macro created in this step will be triggered by a button added to the template.

Below is the macro used to calculate and display the totals for the example provided in the previous screenshots:

Macro to Calculate & Display Totals – Sample

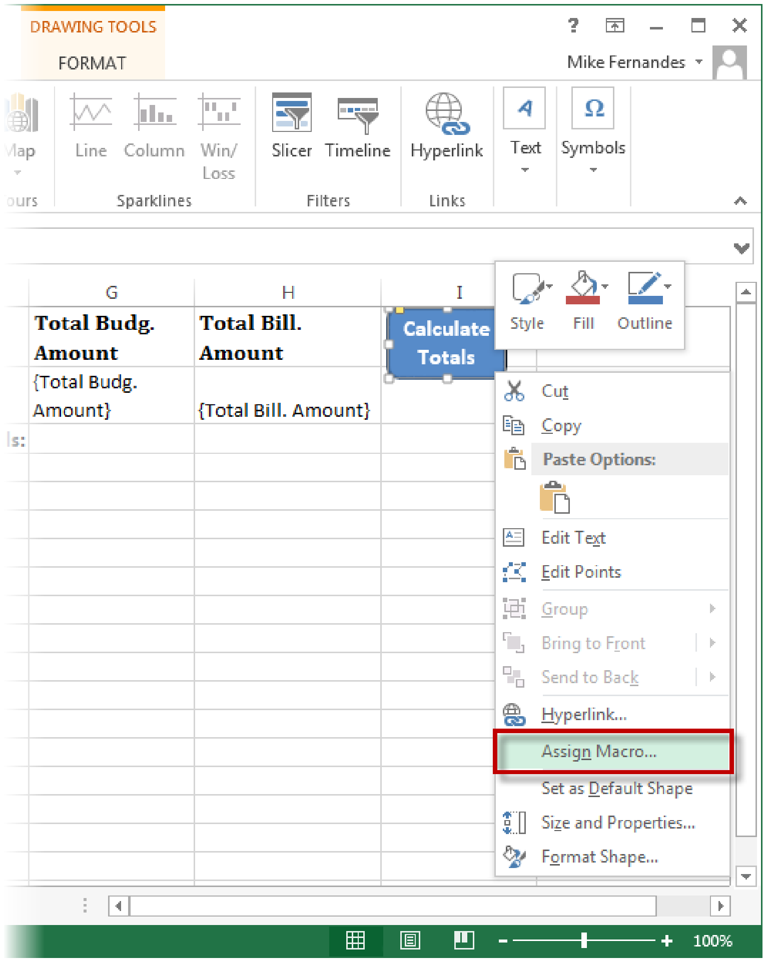
```
Sub CalculateTotals ()
        Dim sum As Double  ' store calculated sum
        'count number of numeric cells in dynamic column G
        numCells = Application.WorksheetFunction.Count(Range("G:G"))

        'sum total for column G
        sum = Application.WorksheetFunction.sum(Range("G2:G" & numCells + 1))
        'display column G total, 1 blank space from last entry in G column
        ThisWorkbook.Sheets(1).Range("G" & numCells + 3).Value = sum

        'sum total for column H
        sum = Application.WorksheetFunction.sum(Range("H2:H" & numCells + 1))
        'dispay column H total, 1 blank space from last entry in H column
        ThisWorkbook.Sheets(1).Range("H" & numCells + 3).Value = sum

        'make the [Calculate Totals] button (Shape) invisible
        ActiveSheet.Shapes.Item(1).Visible = True
End Sub
```

Step 4: Add Button (Shape) to Run Macro to MIP Excel Template

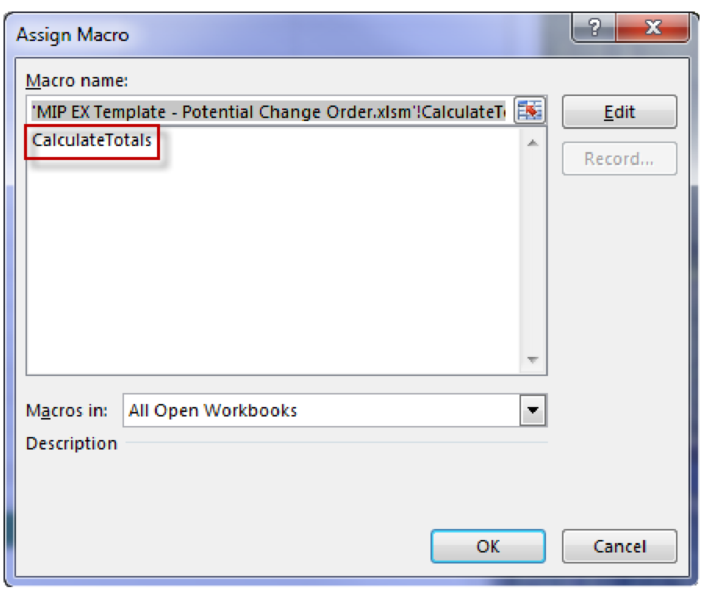


In this step, a Shape is added to the template to function as a button.

After the Shape is set up as desired, right-click it to bring up the context menu. As shown in the below screenshot, select **Assign Macro**.



In the following pop-up, shown below, select the macro created to calcualte and display the totals:



After saving, the process is completed. The template is now ready to be uploaded into CMiC Enterprise.

Document Merge Integration

Can I setup Word and Excel® Merge from Forms Only?

The maintenance and configuration of Document Merge for both Excel® and Word is only available in the PM JSP Application.

Can macros be embedded in the Excel® template files?

Yes – the Excel® template will be of the type XLSM instead of XLSX and will likely require a startup macro function to ensure calculations occur in the output file.

Is there a limit to the number of templates for each document?

No.

Does MIP work with Cold Storage so that any created word docs are automatically saved?

Yes. Cold storage is available with the purchase of CMiC Imaging.

Does a record get created or saved automatically somewhere within CMiC when an MS Word® document is created in CMiC? Does it automatically save these documents as it creates them? This would be a great thing for correspondence.

The template itself is uploaded and stored with the object. Cold storage (if you own CMiC Imaging) is available to save the outbound correspondence as an attachment on the record and specified document type.

Some Form Letter info is addressed in the PM manual; but it would be best to actually get training. On the MIP presentation you mentioned “knowledge” of Form Letters. What kind of training is available?

MIP does involve some setup and knowledge of Form Letters. Two and a half days is typical to train both Form Letters and MIP.

Why do I see grey backgrounds when Previewing an MS Word® Document Merge Letter?

When the output is opened via Microsoft Word® in a DOCX format, all fields that were merged will display with a gray background – this is a view only feature – when the document is actually printed the gray will not display.

Can I use the same Excel® Templates for both JSP and Forms Logs?

In some cases, the field names in the JSP Logs and Forms Logs are not the same. In these cases, the same template can be used, but will only work correctly if the ‘Restrict and Rename’ option in Forms is used to relabel the Forms Fields with the same names seen in the JSP Log. When the names of fields are matching, there is no issue in using the identical templates in both Forms and JSP logs.

Outlook® Integration

Outlook® Export: Are there certain columns that we have to have in our 'Project Contract Directory' to make this work?

Yes. The mandatory columns include Partner Code, Partner Type, Contact Code and Last Modification Time. You will receive a warning if all applicable columns to export are not included in the log.

Is it possible when exporting or importing Outlook® Calendar items to only select certain items to import?

Filtering is available when exporting from CMiC. All activities are currently imported from Outlook® with no filter option.

Is the Importing Calendar function available in CRM?

Yes, importing and exporting is available in CRM. You must be running CMiC release 2006-206-03-2 at a minimum.

Why do I have Action Items from the TEST CMiC Database in my PROD CMiC Database?

When using the OM/DM Contacts and Calendars, keep in mind that since the items are identified by the names CMiC Opportunity Management, that they will copy data (Calendar) from a Test environment to a Production environment. Project related Calendar items are stored with the Project Name and Oraseq, and thus are less likely to cross over. This only applies when using these options in multiple CMiC Databases.

Why did I not get all Calendar Items imported to CMiC?

Only future items are imported. Additionally, if there is any error in the import, rather than bringing in partial data, only a fully accepted record will be imported. Look in the displayed status for the reason of the error in Importing or Exporting.

Can you combine the project calendars into one calendar in Outlook®?

Calendars in CMiC currently have a 1:1 relationship with calendars in Outlook®. However, there is the option to move items to a master calendar once in Outlook®.

Since the calendars are set up as project specific folders in Outlook®, do you still get calendar reminders? (Our past experience is that only the "root user" mailbox calendar sends reminders)

Yes. Reminders are sent from all calendars including those created by the export from CMiC.

Are the calendars and contacts "exchange job-specific mailboxes" or are they "job-specific folders in the public folders" on the Exchange server?

They do not reside on the Exchange Server. They are created as local calendars and contacts.

If there is a change to an existing meeting, would the change be made in CMiC and pushed to Outlook® or made in Outlook® and pushed to CMiC? Can it be done both ways?

Project calendars can be imported and exported, so it would work both ways.

Is a particular JRE required for Calendar export and import?

J2SE1.4 contains the Java Web Start required to run the import/export.

Ability to Print PDFs From MIPs

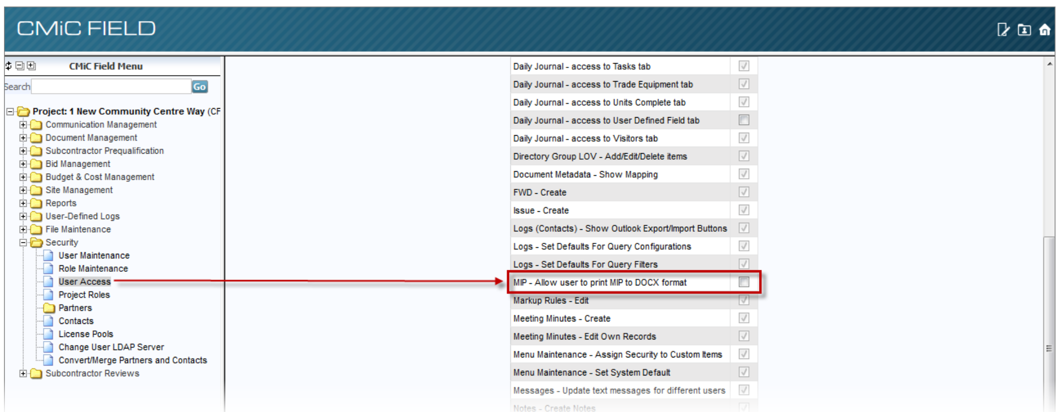
Is it possible to have standard formatting available to avoid changing existing formatting? Is electronic signature processing possible?

To address both of these concerns, users have the ability to print PDFs from MIP documents. Fonts won't be changeable in a PDF, and Adobe can be used for capturing signatures.

Is it possible to prevent users from printing to DOCX from MIP documents and force them to print to PDF?

The following two settings are required to force MIP documents to PDF.

1. The user and all the roles for that user must not have the 'MIP – Allow user to print MIP to DOCX format' privilege in CMiC Field's User Access > Assign Privileges screen found under the Security submenu.



2. The default MIP format in the system options table must be PDF.

NOTE: This field is not currently maintainable via the system GUI, so either CMiC will provide a script to change it or someone qualified to do so must update it within the database.

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