Reference Guide

Microsoft Integration Package v10x (ADF)

By CMiC



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User Reference Guide – Version: CMiC Open Enterprise v10x

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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 placeholder 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

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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

ystem Tables Maintenanci	e - TESTV10X Register Form Letter Data Sources		
stemTable/View Name	Comments		User Extensions +
FLPM1800_V	SC Prequalification	· ·	User Extension1
FLPM2030_V9	Subcontract - Alternates		User Extension2
FLPM3100_V4	Change Item Entry - Markup Lines		User Extension3
FLPM3102_V	Form Letter SC - PCI RFQ Swinerton 12.73040		User Extension4
FLPM3103_V	SC Change Item Entry - Dunning Letter		User Extension5
FLPM7200_V	Short Form PO		User Extension6
FLPM7200_V1	Short Form PO Detail		User Extension7
FLPM7210_V	Equipment Rental PO		More Extensions
FLPM7210_V1	Equipment Rental PO Detail		
HRAPPLICANTS	HR - Applicants		Polated Sereena +
PMMEETING			Kelated Screens
PM_MULTI_FL_ATTACH			Related Screen 1
UETD_SUBCONTRAC			Related Screen 2
FLJSPUDF_V	JSP User-Defined Fields		Related Screen 3
FLOM9000_V	Opportunity Details		Related Screen 4
FLOM9010_V	Opportunity Action Items		Related Screen 5
FLOM9020_V	Opportunity Competitors	<u> </u>	Related Screen 6
N			Related Screen 7
check indicate	es registration is	Show Columns	More Related
system define	d (pre-defined)		

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

Column Name	Comment		Field Name
APL_ADDRESS1	Address of the Applicant	≻	Address of the Applicant
APL_ADDRESS2	Address of the Applicant	>	Address of the Applicant
APL_ADDRESS3	Address of the Applicant	>	Address of the Applicant
APL_APPLICATION_LOC		×	
APL_APPLY_DATE	Date of the Application	>	Date of the Application
APL_APP_SOURCE	click to copy Comment field to	>	
APL_AREAOFINTEREST	corresponding Field Name field	>	
APL_AVAILABILITY_DATE	corresponding rield rand reid	>	
APL_CELL_PHONE	Cell Phone No. of the Applicant	>	
APL_CERT_LIC_NOTE		>	
APL_DATE_OF_BIRTH	Date of Birth of the Applicant	<u>></u>	
APL_DEG_NOTE		>	
APL_DOMINANT_HAND	Dominant Hand as (R/L/B/N)	>	
APL_EMAIL_ADDRESS	Email Address of the Applicant	>	
APL_ETHNIC_CODE		>	
APL_EXPECTED_RATE	Expected Hourly Rate	>	<u>.</u>
lote: Columns with no Field Name	will not be available for selection in Form Letters		<u>C</u> lose
	click to copy all Cor	nme 1 Nai	nt fields to

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

DOCU	MENT TYPES		///////////////////////////////////////	💾 Save 🕞 Exit	ⓓ ⑳ 쳎 [2 - O
SELECTION Appli	N CRITERIA cation PM	Aanagement				
DOCUMEN	ИТ ТҮРЕ					
View 👻	🍸 🖺 Freeze 🚡 Detach 💋	Search 🛛 🖶 Insert 📲 Insert Multipl	le 🔚 Delete 🛞 Workflows 🖛	🖹 Report Options 🛛 👻 🌉 Export	ECM Documer	nts 👻 »
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			E
	SUBCTESTT	SB Subcontract Test	FLPM2030_V			
	TEST007	Eric test 007	FLPM3110_V			
1	FLPM1000	Conversation Record	FLPM1000_V			
\checkmark	FLPM1010	Speed Memo	FLPM1010_V			
1	FLPM1020	RFI Urgent Response Required	FLPM1020_V			
\checkmark	FLPM1040	Submittals Required	FLPM1040_V			
1	FLPM1050	Facsimile Transmittal Cover	FLPM1000_V			
\checkmark	FLPM1100	Enter Communication Log	FLPM1100_V			
\checkmark	FLPM1150	Document	FLPM1150_V			
	FLPM1200	Request for Information	FLPM1200_V			-
Show Co	umns check indicates ty system defined (p	/pe is re-defined)				

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

DOC	UMENT TYPES			💾 Save 🛈 🕐 🛆 📝 🤉	~ C
Tab	le/View Name FLPM1800_V				
AILAB					
/iew 🔻	🝸 🖪 Freeze 📲 Detach				
Key	Column Name	Comment	Copy Comment	Field Name	
1	FLPM1800_BP_ORASEQ	Business Partner Oraseq	Copy Comment		
	FLPM1800_ADDITIONAL_COMMEN	Additional Comments	Copy Comment	Additional Comments	
	FLPM1800_AGGREGATE_PROJ_LIMI	Aggregate Project Limit	Copy Comment	Aggregate Project Limit	
	FLPM1800_BP_ADD1	Address Line 1 (Street)	Copy Comment	Address Line 1 (Street)	
	FLPM1800_BP_ADD2	Address Line 2 (Suite)	Copy Comment	Address Line 2 (Suite)	
	FLPM1800_BP_ADD3	Address Line 3 (City)	Copy Comment	Address Line 3 (City)	
	FLPM1800_BP_AKA_NAME	Also Known As	Copy Comment	Also Known As	
	FLPM1800_BP_CODE	Business Partner Code	Copy Comment	Business Partner Code	
	FLPM1800_BP_CONTACT_NAME	Contact Name	Copy Comment	Contact Name	
	FLPM1800_BP_COUNTRY	Country	Copy Comment	Country	
	FLPM1800_BP_EMAIL	Email Address	Copy Comment	Email Address	
	FLPM1800_BP_FAX	Fax Number	Copy Comment	Fax Number	
	FLPM1800_BP_ID	Business Partner Id (Tax Id)	Copy Comment	Business Partner Id (Tax Id)	
	FLPM1800_BP_NAME	Business Partner Name	Copy Comment	Business Partner Name	
	FLPM1800_BP_PHONE	Phone Number	Copy Comment	Phone Number	
•					F

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

FORM LET	TER DEFINITION								💾 Save [Exit	1		[≱ ≂ C
DOCUMENT TYPI	E												
Application	PM A Pro	ject Management											
Letter Type	FLPM2030 A Sub	ocontract Document											
FORM LETTER FO	ORMAT												
View 👻 🍸	🌇 Freeze 🛛 🖶 Detach	👩 Search 🛛 🖶 Insert	🗐 Insert Multiple	Delete	🗞 Work	flows 🛛 🕶	🔒 Report	Options 🛛 👻 🌉 Export	ECM Docu	ments	- אַט	ser Exter	sions
* Code		* Description		* Ac	tive	* Form	nat	Copy Format					
KHSUBAGREE	Subcontract Agreemen	it - STANDARD				Advanced	-	Copy Format					-
MCSUB	Fletcher Sub					Advanced	-	Copy Format					
PM2030_000	MASTER FL - Subcontra	ict (PMSCFM)				Advanced	-	Copy Format					
PM2030_001	Bonds Waived (PM2030	0_001)				Advanced	-	Copy Format					
PM2030_002	Equipment Rental Agre	ement (PM2030_002)				Advanced	-	Copy Format					
PM2030_003	Letter of Intent (PM203	30_003)				Advanced	-	Copy Format					=
PM2030_004	Subcontract Cover Lett	er (PM2030_004)				Advanced	•	Copy Format					
PM2030_STD	Subcontract Cover Lett	er - STANDARD				Advanced	-	Copy Format					
SAMPLE	Sample SC Form Letter	(with Text Codes)				Advanced	•	Copy Format					
SC-CVLT-MF	Subcontract Cover Lett	ter - MF		V		Advanced	-	Copy Format					
	A.11												
	En Freeze Sta Detach	Search	Insert Multiple	Delete	®- Work	flows -			.O. ECM Docu	ments	<u>- २</u> ॥	ser Fyter	sions
view • 1		g scaren ag insere	Insere manapie	and belete	-30 Hork			options • 📷 capore	The composed		. 19.	JUI EXCL	510115
* Order	Data Source		Name		D	efine Relati	ion/Order	BY					
1 FLP	MKEYPL_V					Define Rela	ation/Ord	er BY					

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

FORM LETTER DEFINITION	💾 Save 🕡 🕐 🛆 🛛 🗸 🗸
Report Description	
* Code PM-SUBCON-EQUIP Description SubCon - Equipment Rental Agreement Copy Close	

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.

FORM LETTER DEFINIT	ION				Save	 (i) (i)	
COLUMN MAPPING							
View 👻 🍸 🌇 Freeze 🖀 🛙	Detach 👩 Se	arch 🛞 Wo	orkflows 🛛 👻 🔒 Report Op	otions 💌 🌉 Ex	port 🔗 ECM Do	ocuments 💌	
* Column	Rel O	perator	Master Columns/Da	ata Order Seque	By		
FLKP_PMPC_PROJ_ORASEQ	=	•	FL2030_PROJ_ORASEQ	A			
FLKP_PMPC_CONTACT_DESC	=	•	1				
FLKP_PMPC_CLV_VALUE_CODE5	=	•					
FLKP_PMPC_CONTACT_TITLE	column of a	additiona	data source to	column	of primary	data source	to
FLKP_PMPC_OTHER	match corr	espondin	g column of	match c	orrespondi	ng column	of
FLKP_CLV_DESC1	primary dat	ta source	·	addition	al data sou	rce	- 1
FLKP_PMR_ROLE_NAME	=	•					_
FLKP_PMPC_CLV_VALUE_CODE1	=	•					
FLKP_PMPC_ADD_LINE2	=	•					
FLKP_PMPP_PARTN_CODE	=	•					
FLKP_CONTACT_NAME	=	•					
FLKP_CLV_DESC3	=	•					
FLKP_PMPC_MOBILE_NUM	=	•					
FLKP_PMPC_EMAIL	=	-					
FLKP_PMPC_PHONE_NUM	=	-					
FLKP_PMPC_EMP_NO	=	•					
FLKP_CONTACT_CODE	=	•					
FLKP_PMPC_PRIMARY_FLAG	=	•					
FLKP_PMPC_POSTAL_CODE	=	•					
FLKP_PMPC_CLV_VALUE_CODE3	=						

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

Create Fields for Use in Document Merge				
Report Type	Subcontract Document : Subcontract Cover Letter - STANDARD 👻			
	Create			

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 I Subcontract Cover	Document Me Letter - STAN	rge Template DARD
Subcontract Document		
Field Name	Data Type	Description
<pre>{FLPM2030_V.FL2030_ACTION_CODE}</pre>	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
<pre>{FLPM2030_V.FL2030_ARCH_FAX_NUM}</pre>	VARCHAR2	Arch Fax Num
<pre>{FLPM2030_V.FL2030_ARCH_MOBILE_NUM}</pre>	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
(ELDAGAGA VELGAGA ADOLL DOLE 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} -	replacement field
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_LINE1)	
(FLPM2030_V.FL2030_VEN_CONTACT_ADD_LINE2)	
(FLPM2030_VEL2030_VEN_CONTACT_REGION_CODE)	
(ELDM2020 VEL2020 VEN CONTACT DOSTAL 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 <u>follow</u> a replacement field (MIP field) and are treated as modifiers for the replacement operation. Note, these modifiers must be added just <u>after</u> 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	r 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

Report												
Report PM2030_STD	Description Subcontract	Cover Letter - STANDA	RD	User ID MIKEFER1	Show 1.22							
Template Name	Template Description	User Default			Action							
AIA_Subcontract.docx	AIA_Subcontract Cover Letter docx	0	Upload Template File	Download Template File	×+							
Subcontract Details - Template.docx	Subcontract Cover Letter - Template - MF.docx	0	Upload Template File	Download Template File	×+							
SCmergefields.docx	HCI Cover Letter - Template - MF.docx	Opload Template File		Download Template File	×+							
	U	pdate										

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.

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.

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

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

Step 7: Print MIP Word[®] Document (JSP)

🥑 Select Report - Mozilla Firefox										
Print Multiple Form-Le	etter									
Group By Report Type:										
Report Type	Subcontract Document 🗸									
Report Name	WORD:Subcontract Cover Letter - STANDARD - MF 👻									
Template Subcontract Details - Template - MF.docx 👻										
	Print Close									

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**].

😻 Form Letter - Mozilla Firefox											
test4v10.cmic.ca:7785/cmictestv10x/SysRptParams/acceptRptParams.do?											
Report Config											
Print Server	testv10x 💌										
Destination	Preview 💌										
Name	dell5350dn 💌										
Format	DOCX 💌										
Print Blank Letter											
Run Report Close											

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. Reports with the destination set to 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: <u>http://www.microsoft.com/downloads/details.aspx?FamilyId=941B3470-3AE9-4AEE-8F43-</u> <u>C6BB74CD1466&displaylang=en</u> 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

Project Management								Add Change Iten	n Show Filter	Send To Sp	readsheet	Enter Query	₽ (ī ô
🗘 🖻 🗉 🛛 Project Management Menu			Potential Change Items-PRMPT											
Search Go			PCI Name		Post Date	Status	Туре	Total Budg. Amount	Total Bill. Amount	Classifier 1	Classifier 3	Attachments		Source
Project: Seymour's TEST Project (SP100) Ommunication Management	•	EXT0003	Client Change Order EXT003	05/Dec/2012		Approved	External / Owner Change Orders	50,000.00	50,000.00					
Project Calendar	•	EXT0002	Client Change Order EXT002	05/Dec/2012	05/Dec/2012	Approved	External / Owner Change Orders	60,000.00	60,000.00					
Outlook Import/Export Project Partner Directory	•	EXT0001	Client Change Order EXT001	05/Dec/2012	05/Dec/2012	Approved	External / Owner Change Orders	60,000.00	60,000.00					
Project Contact Directory Distribution Lists	То	otal (3 row	(\$)					170,000.00	170,000.00					

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.

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FILE HO	OME INSERT PAG	GE LAYOUT	FORMULAS E	DATA REVIE	W VIEW			Mike Fernandes 👻 🔍
Paste	Calibri • 11 B I <u>U</u> • • •		= = %·	Gene \$ *	ral ▼ ि Condition % > ि Format a % Cell Style	onal Formatting as Table • es •	 Therefore Therefor	∑ · A Z · Z · Find & Sort & Find & Filter · Select ·
Clipboard 🕞	Font	Fa	Alignment	5 Nur	nber 🕞	Styles	Cells	Editing 🧳
A13	- : 🗙 🗸 f	fx						
A	В	С	D	E	F	G	н	I
1 PCI No.	PCI Name	Date	Post Date	Status	Туре	Owner Change	Total Budg. Amount	Total Bill. Amount
2 EXT0006	PCI Projections	tions 2012-8-15 Pandim			External / Owner Change Orders xternal / Owner		22500	22500
3 EXT0001	review phase QTY	create repla	acement field	ls in templa	te :hange 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	5	0	0
6 INT00004	review auto calc and save draft	2013-8-21		Pending / Forecast	Internal / Change Order	2	505	0
7 INT00005	review billing amount	2013-8-21		Pending / Forecast	Internal / Change Order	2	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	2	5050	0
12								

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

x	l 🖯 🅤	- C ²			PMCHG	M (1).xlsx - E	xcel			? 📧 – 🗆 🗙
F	FILE HO	ME INSERT PAG	GE LAYOUT	FORMULAS [DATA	REVIEW	VIEW			Mike Fernandes 👻 🔍
Pa	ste pboard ⊊	Calibri v 11 B I ∐ v I ⊞ v I Font		E = Nor v E = E E E E Alignment		Date \$ ▼ % €.0 .00 Number	 ✓ E Conditi ✓ Format ✓ Cell Sty 	onal Formattir as Table + les + Styles	ng • Insert • • Delete • • Format • Cells	∑ · A · Z · Sort & Find & · Filter · Select · Editing ∧
C	16	- : × / 1	fx							~
	А	B	C	D	E	E	F	G	Н	I
1	PCI No.	PCI Name	Date	Post Date	Status	ту	pe	Owner Change	Total Budg. Amount	Total Bill. Amount
2	{PCI No.}	{PCI Name}	{Date}	{Post Date}	{Status	י ד ו ו	vpe	{Owner Change}	Total Budg. Amount	Total Bill. Amount
3	Г Т					-				
4										
5										
6										
7										
8										
9										
10										
11										

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.

x	5-	E 5 · ♂ · = PMCHGM-29.xlsm [Read-Only] - Excel												×
F	ILE HO	ME INSERT PAG			Mike	Fernandes	- 0	1						
$\begin{array}{c c} & & \\ & & \\ & & \\ & \\ Paste \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ & \\ $			= = &	•		▼ 0.00 ↔0	Conditional Formatting * Format as Table * G00 → 00 Gell Styles *		Thisert •	∑ · A ∑ · Z · A Sort & Find & Filter · Select		k T		
Cli	pboard 🗔	Font	<u>G</u>	Alignmen	t G	Number	Fa		Styles	Cells	E	diting		^
A	L6 ·	r : $\times \checkmark f$	c						d	lynamic colu	ımns			¥
	Α	В	С	D		E	F		G	н		I		
				Post					Total Budg.	Total Bill.				
1	PCI No.	PCI Name	Date	Date	Status		Туре		Amount	Amount				
	EXT000000				Pending - P	Proceeding	External	Scoped						
2	6	Guard Booths	2015-10-15		and Foreca	ast	Changes		3180.00		3180			
2	EXT000000	Guard Baatha	2012 10 10		Pending - I	Proceeding	External :	Scoped	21.00.00		2100			
3	5	Guard Booths	2013-10-10		and Foreca	ist	Changes	Seened	3180.00		3180			
4	1	Sample Forms PCI	2013-2-21		Approved		Changes	scoped	0.00		0			
-	- V10-022-	Sample PCLADE V10-	2013 2 21		Pending - P	Proceeding	changes		0.00		v			
5	200	022-2	2011-12-21		and Foreca	ast	Internal (Changes	s 0.00		0			
_	CO1000000							0						
6	01	Test Autonum	2011-7-22		Prependin	g	Internal (Changes	14750.57		0			
	EXT000000				Pending - P	Proceeding	External	Scoped						
7	2	Mandatory Text	2011-7-15		and Foreca	ast	Changes		2125.25	2	2125.25			
	EXT000000				Pending N	ot	External	Scoped						
8	3	Andy test pci july15	2011-7-15		Proceeding	g or Forecast	Changes		5000.00		5000			
	1 EXT000000	Do things	2011 7 12		Pending - F	Proceeding	External :	scoped	2500.00		2500			
10	1	Do tillings	2011-7-12		and Forecast		changes		2300.00		2300			
11								Totals:	30735.82	15	985.25			
12														
13														
14														Ŧ
	< >	Sheet1 (+)											►	
RE/	ADY 🔠									I 🗉		+ :	100%	

Add Totals to Dynamic Columns

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

Project Manage	ment			[/ ⊑ ⋒
🌣 🖃 🗉 Project Management Menu		Templates		
Search	Log CMOWNCO	Description Change Orders		Show
Project: WBS2 Main with PCI as	Template Name	Template Description		Action
Document Management	MIP EX Template - Fletcher-Change Order .xlsx	MIP EX Template - Fletcher - Change Order .xlsx	Upload Template File Download Template File	×+
E Subcontractor Prequalification	MIP EX Template - HCA-Change Order .xlsx	MIP EX Template - HCA - Change Order .xlsx	Upload Template File Download Template File	×+
Bid Management Bid Management Budget & Cost Management Site Management		Update		

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.

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.

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

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

Maintenance Screen for Log Types & Log Type's Datasource

Step 4: Restrict MIP Template Availability by Company & Project

XP Report A	Assignment					Report	efaults Save	2 🖬 🍙
Subcontractor F	Rating Setup			Report Assignm	ient			
Prequalfications	s Control	Report Type	MIP Document 💌					
	ication	Object	Bid Packages	-				
E Did Management		Object	bid i dekuğes					
Invitation to Bid Bidder Deepere			MIP Doc	cuments		Compan	/	
Bid Items	se Log	Template Name		Template Description		CMiC Test Construction Co	A	+×
Bid Packages		PMBIDPKG.xlsx	Bid Pkg Template					+
- 🗁 Buyout Items Lo	og	PMBIDPKG2.xlsm	Bid Package with Macros					
Buyout Items			-					
Addenda								
Enter Bid								
Analyze Bids								
Analyze Bids (E	Buyouts)					Project		
Analyze Bids (E	Buyouts Form)					All Projects Av	ailable	
Bid item Group i	Dules							+
H Dudget & Cost Man	agement							
🗄 🦲 Site Management								
E 🔁 Reports								
🗄 🧀 User-Defined Logs								
E 🔁 File Maintenance		•			+			

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 $\frac{1}{2}$ icon under the **Project** section to add desired Projects (NOTE: if the $\frac{1}{2}$ icon is unavailable, click the $\frac{1}{2}$ icon under the **Company** section, and it will appear). Click \times 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

Project Management						12 🗈	â
🗘 🖃 🗄 Project Management Meni 📥		Securit	y Roles	5			*
Search						Add A New Role	
	Role Code 🔺	Role Name	Admin	Actions	Assign		Ξ
Project: Sick Children's Hos	*ALL*	*ALL*			Choose your action		
Communication management Document Management	ADFMOBILE	ADFMOBILE-DONOTMODIFY	Y	🛯 🗙	Choose your action		
🗄 🦲 Subcontractor Prequalificatic	AHOWN	Andrew Owner	Y	🛯 🗙	Choose your action		
Estimate Management	AHZZ	AHZZ	N	🛯 🗙	Choose your action		
Bid Management Budget & Cost Management	ANDEXT	andrew hung ext.	N	🛯 🗙	Choose your action		
E Site Management	ANDREWH	ANDREWH	Y	😒 🗙	Choose your action		
E Reports	ANDRUB	andrub	Y	🛯 🗙	Choose your action		
⊕ 🛄 User-Defined Logs	ANDSCH	Andrew's SCH Role	N	🛯 🗙	Choose your action		
File Maintenance	ANDVPQ	Andrew's VPQ Role	N	🛯 🗙	Choose your action		
Partners	ANOTHER	Another Role	N	😒 🗙	Assign Users Assign Programs		
Contacts	ASADK	Role Owned by AK	Y	🛯 🖾 🗙 🚺	Assign Menu Items	1	
Convert Partners and Co	AZROLE	AZRole	Y	😒 🗙	Assign Privileges		
User Maintenance	BASKET	An Entire Basket of roles	N	😒 🗙	Choose your action		
Role Maintenance	BHTEST	BH Test Role	N	😒 🗙	Choose your action		
User Access	BREAD	Breadi role	N	😒 🗙	Choose your action 💌		
< >	CM DM/DE	Weird role	М	100	Chaose your action		Ŧ

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).

Project Management		2 🗅 🍙
🕸 🖃 🗉 🛛 Project Management Menu	Add/Remove menu items from the MIKEPMJSF	Role
Search Go	Select A	Unselect All Update Back
	Menu Item Grant	ed
Project: LG project for controlling and Su	Communication Management	E
Project Calendar	Project Calendar	
My Actions	My Actions	
Outlook Import/Export Project Partner Directory	Outlook Import/Export	
Project Partiel Directory	Project Partner Directory	
Distribution Lists	Project Contact Directory	
Meeting Minutes	Distribution Lists	
Transmittals	Meeting Minutes	
Communications		
- RFI's	Transmittais	
Issues	Transmittals Queue	
Document Management	Communications	
	RFI's	
🗄 🦲 Budget & Cost Management	Issues	
🗄 🧰 Site Management	Document Management	

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

Project Management Meni		Project Contact Directory														
ch	Contact Code	Contact Name		Prefix Name	Contact Title		Phone		Pager		Address Line1	Address Line2	Address Line3	Region Code	Postal Code	Country Em
Project: Sick Children's Hos Communication Management Project Calendar	▲ A1_RF	Robert Franco	AStanciu Construction23			robert.franco@cmic.ca					45 Buchanan		Chicago	L		USA
My Actions My Actions Outlook Import/Export Project Partner Directory Project Contact Directory	∢ AB	Sied Farhan	The Atlas Corporation The Atlas Corporation test			sied.farhan@cmic.ca	416.736.0124	(416) 999-8569		4165559999	716 Riverside Rd.		NewYork	NY	76592	US
Distribution Lists	▲ DA	Database Administrator	CMiC Test Company Incorporated			oliverritchie@computermethodsinternationalcorporation.com	(543) 7654-1313	(545) 654-1212			321 Lake Shore Boulevard	Suite 117	Los Angeles	CA	07091	UK
	∢ HH	Harry Houdini	Melloul Blamey Construction			houdini@mbc.com	416-282-2828				55 Bay Str	170111	Toronto	ON	мзмзмз	Canada
RFfs	↓ JG	John Grand	Grand's & Joy's Electrical Contractors			jgrand@gjec.com					100 Record Street		St. Louis	мо		
Subcontractor Prequalificatic	∢ JL	Jimmy Longfellow	L.J. Barton Mechanical	Mr	Mr	jmmyl@jbarton.com	416-547-4478	416-547-4478			6590 James Street	Suite 700	Chicago	L	60601	USA
B Budget & Cost Management	▲ PC	Patrick Campbell	QA Test Partner			pcampbel@qatp.com	352-593-4679	352-593-4600			25 Quality Street	Suite 700	Chicago	L	60601	USA
Reports	∢ RS	Rasto Sadecky	CMiC Test Company			rasto@cmic.ca	416 736 0123	(416) 735-1851			SEZ					

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.

	5 501.050	Sick Children's Hospital Leo Epstein Building	- Mike.Fernandes@cmic.ca - Outlook	? 🗈 – 🗆 🗙
New New Contact New Contact Group Items*	Meeting More	People Business C Card v	Move Mail OneNote Merge Actions Share Contacts	Categorize → Search People Follow Up → Address Book Private Tags Find ♠
My Contacts Skype for Business Contacts Contacts Sick Children's Hospital Leo Epstei Connect to a social network Project's imported Contacts	Communicate Search Sick Chi 123 ab cd ef gh ij ij ki mn op q r s t uv w w x y z	Idren's Hospital Leo Epstein Building (Ctr) Database Administrator Patrick Campbell Sied Farhan Robert Franco John Grand Harry Houdini Mr Jimmy Longfellow Rasto Sadecky	Actions Patrick Camp Presence unknown QA Test Patrier QA Test Patrier CONTACT NOTES WHAT'S NEW Calendar Schedule a meeting Send Email pcampbell@qatp.com Call Work (352) 593-4679 Work Fax (352) 593-4600	Image Find Image Dbell Edit Image Image Edit Image View Source Outlook (Sick Children's Hospital Leo Epstein Link Contacts Company QA Test Partner Work Address Z0uality Street Suite 700 Chicago, IL 60601 USA
Mail Calendar P	eople Tas	sks ···		
🔲 48.9 GB FREE ПЕМ5: 8		ALL FOLDERS ARE UP T	O DATE. CONNECTED TO: MICROSOFT EXCHANGE	🔲 🗐+ 100%

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

SysCalendar										Outlook I	import/Exp	ort Add Action Ite	m Editl	Preferences	2 🗈 🍙
🋱 🖃 🗉 Project Management Menu	Mo	onthly Cal	enda	r				August 💌 2	015 💌						
Search	м	lonth Week	Day	All											
Project: Freshmart - Orangev Orangev Orangev	"	ŧ						August 20	015						*
Project Calendar		Sun		Mon		Tue		Wed		Thu		Fri		Sat	
Outlook Import/Export	Weel	^k Jul 26	Add	Jul 27	Add	Jul 28	Add	Jul 29	Add	Jul 30	Add	Jul 31	Add	Aug 01	Add
Project Partner Directory	Weel 32	^k Aug 02	Add	Aug 03	Add	Aug 04	Add	Aug 05	Add	Aug 06	Add	Aug 07	Add	Aug 08	Add
Meeting Minutes	Weel 33	^k Aug 09	Add	Aug 10	Add	Aug 11	Add	Aug 12	Add	Aug 13	Add	Aug 14	Add	Aug 15	Add
		Aug 16	Add	Aug 17	Add	Aug 18	Add	Aug 19	Add	Aug 20	Add	Aug 21	Add	Aug 22	Add
Communications RFI's Issues	Weel 34	k										10:30am - 11:45a Meeting to Discuss Opportunity	.n ;		
🕀 🦳 Document Management		Aug 23													

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®

Project Manage	ement								Ex	port to Outlook	Import	from Outloo	k Show	ı Filter	Send To Spre	adsheet Ei	nter Query	12 🗉	D 🔓
Deroject Hanagement Henu Search Project: Freshmart - Orangevi Commission Management Project Calendar My Actions My Actions Multiple import	In order to f records afte © Export © Export Proceed	ully synchr r Full Delet All displaye All displaye	ronize any (te ", ed records ; ed records ;	CMIC master c after Full Dele Only	alendar del te 4	etions with yo	yr Mitrosoft O	Outlook (Calendar, yo	u need to first r	un a full c	lelete on the	Outlook	Calenda	r folders by se	lecting option	"Export All	displayed	*
Project Partner Directory	Category	Subject	Body	StartDate	StartTime	EndDate	EndTime Dur	ration A	Systen AlertMinutes	Calendar	Location	Importance	Sharing	Status	CreationTime	LastModifica	itionTime 0	DRASEQ Ite	mId
Unstroution Lists Minutes Transmittals Transmittals Communications RF/s Issues	To Be Determined	Meeting to Discus Changes to Parking Lot	Meeting to dscuss changes to parking lot	11/Feb/2016		11/Feb/2016	144	40		Mike Fernandes		To Be Determined	Shared	NEW	2016-02-03 02:38pm		8	\$716209	
Document Management Subcontractor Prequalification Bid Management Bid Management Site Management	To Be Determined	Submit PCI for Parking Lot ws)	Submit PCI for parking lot	12/Feb/2016		12/Feb/2016	144	40		Mike Fernandes		To Be Determined	Shared	NEW	2016-02-03 02:41pm		8	716212	Ξ

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**].

Do yo	ou want t	o run this	application?
-		Name:	sysoutlookinterface.ImportExportData
	<u>(</u>	Publisher:	Computer Methods International Corp.
Ŀ	É	Locations:	http://test4v10.cmic.ca:7785
			Launched from downloaded JNLP file
This app informa	blication will ru tion at risk. Ru	n with unrestrie un this applicati	cted access which may put your computer and personal ion only if you trust the locations and publisher above.
Û	More Inform	ation	Run Cancel

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.

or ≕ 5 ÷	Fresh	mart - Orangeville Grocer	y Store (Fall 2015)(824023	4) - Mike.Fernandes@cmi	c.ca - Outlook		? 🖻 – 🗆 🗙
FILE HOME SEND / RECEIVE	FOLDER VIEW	ADD-INS					
New	e Today Next 7 Days ing Go To Ts	Day Work Week Mo Week Arrange	nth Schedule Open View Galendar Manage	Calendar Cal	Share Publish Calen alendar Online - Permiss Share	dar ions Find	
✓ February 2016	▲ ▶ Februar	y 2016	Washington, D.O	💭 Today 55°F/44°	F	Search Freshmart - O	rangeville Grocery St 🔎
31 1 2 3 4 5 6	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 24 25 26 27	Jan 31	Feb 1	2	3	4	5	6
March 2016 SU MO TU WE TH FR SA 1 2 3 4 5 6 7 8 0 10 11 12	7	8	9	10	11 Meeting to Discus Changes to Parking Lot	12 Submit PCI for Parking Lot	13
6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9	14	15 Weekly Meeting to Discuss Project's Progress	16	17 Weekly Meeting to Discuss Project's Progress	18	19	20
My Calendars Calendar	21	22 Weekly Meeting to Discuss Project's Progress	23	24 Weekly Meeting to Discuss Project's Progress	25	26	27
Fort Hood Barracks(32294538) RV100(30955619) Freshmart - Orangeville Gr	28	29 Weekly Meeting to Discuss Project's Progress	Mar 1	2 Weekly Meeting to Discuss Project's Progress	3	4	5
Mail Calendar Peo	ople Tasks						
🔲 48.9 GB FREE ПТЕМS: 8			ALL FOLDERS ARE UP T	O DATE. CONNECTED T	D: MICROSOFT EXCHANGE	🔲 💷	+ 100%

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.

📰 🕞 🍤 🕈 🎍 🔻 Weekly Meeting to Discuss Project's Progress - Recurring Event ? 📧 - 🗆 🗙											
FILE REC	URRING EVENT	INSERT FORMAT TE	XT REVIE	W ADD-	INS						
Save & Delete C Close	Copy to My Copy to My Copy to My	Show	Skype Meeting Skype Me	Meeting Notes Meeting	Invite Attendees Attendees	Options •	Tags	Zoom	n Ap C	ps for ffice Id-ins	~
To Be Determine	ed										
Subject Wee	Subject Weekly Meeting to Discuss Project's Progress										
Location Mai	Location Main Boardroom 👻										
Recurrence Occu	urs every Monday a	and Wednesday effective 2/1	5/16 until 3/31	/16							
Weekly meeting to discuss project's progress and any unresolved issues.											
In Folder 🔢 Freshmart - Orangeville Grocery Store (Fall 2015)(8240234)											

Calendar Import from Outlook[®]

Project Manage	ement								Exp	port to Outlook	Import	from Outlool	. Show	Filter	Send To Sprea	adsheet Enter Q	Jery 🕻	E 6	
Deroject Management Menu Search Project: Freshmart - Orangevi Communication Management Project Calendar Mv Actions Wu dockingor/Export	In order to s Import Import Import Click on the Proceed	synchronize after Delet only "Outlook Ir	e any Micro te 4 nport/Expo cel	soft Outlook c	alendar del esh the dat	etions with ye	er Cruc mas	ster calen	ndar, you nee	ed to select opt	ion "Impor	t after Delete	r.						•
Hroject Partner Urrectory	Category To Be Determined	Subject Meeting to Discus Changes to Parking	Body Meeting to dscuss changes to parking	StartDate 11/Feb/2016	StartTime	EndDate 11/Feb/2016	EndTime D	Duration	System AlertMinutes	Calendar ContactName Mike Fernandes	Location	Importance To Be Determined	Sharing	Status	CreationTime 2016-02-03 02:38pm	LastModificationTin	ne ORASEQ 8716209	ItemId	
Subcontractor Prequalification Big Bid Management Big Bid Management Big Site Management	To Be Determined	Submit PCI for Parking Lot	Submit PCI for parking lot	12/Feb/2016		12/Feb/2016	1	1440		Mike Fernandes		To Be Determined	Shared	NEW	2016-02-03 02:41pm		8716212	:	
Reports	То Ве	Weekly Meeting to								Mike		То Ве			2016-02-03				

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**].

x Do you want to run this application?									
_		Name:	sysoutlookinterface.ImportExportData						
	<u>(</u>)	Publisher:	Computer Methods International Corp.						
Ŀ	É	Locations:	http://test4v10.cmic.ca:7785						
			Launched from downloaded JNLP file						
This app informa	This application will run with unrestricted access which may put your computer and personal information at risk. Run this application only if you trust the locations and publisher above.								
1	More Inform	ation	Run Cancel						

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.

📵 Action Items ·	Mozilla Firefox			K							
🛞 test4v10.cr	nic.ca:7785/cmictestv10x/SysMaintainCalendar/AI.do?aiOraseq=871	16775&appCode	=COLLAB&userProjCalFlag=Y&c	:all							
	Edit Action Item										
Check Spelling	Save Save All Reschedule Save & New	Delete	Delete All Recurring Cancel								
Type	● Shared ◎ Private ◎ Public			=							
For	Mike Fernandes										
Action Code	Outlook Calendar Item 🔺 🛨	Status									
Start Date	030216 🔯	Duration	1								
Time	V am V	End Time	💌 : 💌 am 💌								
Title	Weekly Meeting to Discuss Project's Progress	Urgency	A								
	Weekly meeting to discuss project's progress and any unresolved issues.										
Description											

💽 🗄 🍤 🗸				CMIC Opp	portunity Mana	igement - Mike	.Fernandes@cn	nic.ci	a - Outlook					? 🖪	i – D	×
FILE HOME SEND / RECEI	VE FOLDER	VIEW AI	DD-INS													
New New New New New Appointment Meeting Items -	Skype eting	Next 7 Day Days	Work We Week	ek Month Sch	nedule Op View Calen	en Calendar dar * Groups *	E-mail SI Calendar Cal	hare lenda	Publish or Online * Pe	Calendar ermissions	Search People	ok				
New Skype	Meeting Go To	5	Arran	ige	5 Man	age Calendars			Share		Find					^
V February 2016 Washington, D.C. • 🖓 Ioday SU MO TU WE TH FR SA									ent (Ctrl+E)	٩						
31 1 2 3 4 5 6 Freshmart - Orangeville Grocery Store (Fall 2015)(8240234) X 🔶 CMIC Opportunity Management X																
7 8 9 10 11 12 13	SUN	MON	TUE	WED	THU	FRI	SAT		SUN	MON	TUE	WED	THU	FRI	SAT	-
14 15 16 17 18 19 20	Jan 31	Feb 1	2	3	4	5	6		Jan 31	Feb 1	2	3	4	5	6	
21 22 23 24 25 26 27													Test	or Spec		
20 25																
March 2016																
SU MO TU WE TH FR SA	7	8	9	10	11	12	13		7	8	9	10	11	12	13	
1 2 3 4 5					Meeting to Discus	Submit PCI for		L	Test for Sp							
6 7 8 9 10 11 12					Changes to Parki	Parking Lot										
13 14 15 16 17 18 19 20 21 22 23 24 25 26		45	4.0	47						45	4.6	47	4.0	10		
27 28 29 30 31 1 2	14	15 Weekly	16	1/ Meekly	18	19	20		14	15	16	1/	18	19	20	
3 4 5 6 7 8 9		Meeting to Discuss Project's		Meeting to Discuss Project's												
My Calendars	21	22	23	24	25	26	27		21	22	23	24	25	26	27	
Calendar Fort Hood Barracks(32294538 RV100(30955619))	Weekly Meeting to Discuss Project's		Weekly Meeting to Discuss Project's												
Freshmart - Orangeville Gr.	. 28	29	Mar 1	2	3	4	5		28	29	Mar 1	2	3	4	5	
CMIC Opportunity Manage		Weekly Meeting to Discuss Project's		Weekly Meeting to Discuss Project's												Ŧ
Mail Calendar F	People T	asks 😶														
🔲 48.9 GB FREE ПЕМS: 1	All FOLDERS ARE UP TO DATE. CONNECTED TO: MICROSOFT EXCHANGE 1 10															

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 <u>sales@cmic.ca</u>) 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

x	5-	⊘		MIP EX	Template - Potential Char	ge Order.xlsm - Excel			? 🗈 – 🗆 X	
F	ILE HO	ME INSERT	PAGE LAYOUT F	ORMULAS D	ATA REVIEW VIE	W DEVELOPER		1	Mike Fernandes 👻 🔍	
Pa Clij	ste 💉	Calibri T	$\begin{array}{c c} 11 & A^{*} & A^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} A^{*} & A^{*} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & A^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \hline \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \hline \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \end{array} \\ \begin{array}{c c} B^{*} & B^{*} \\ \end{array} \\ $	≡ = ≫ - ≡ = € 1 Alignment	General S - % * Number	Conditional Formatting	Format as Cell Table × Styles × Styles	Em Insert ▼ The Delete ▼ Format ▼ Cells	AZY A Sort & Find & Filter - Select - Editing	
H:	12		Jx						*	
	Α	В	С	D	E	F	G	Н	I 🔺	
							Total Budg.	Total Bill.	Calculate	
1	PCI No.	PCI Name	Date	Post Date	Status	Туре	Amount	Amount	Totals	
							{Total Budg.			
2	{PCI No.}	{PCI Name}	{Date}	{Post Date}	{Status}	{Type}	Amount}	{Total Bill. Amount	t}	
3						Totals	:			
4										
5										
6										
7									•	
	4 E	Sheet1	+			: •			•	
RE/	READY 🔠									

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

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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.

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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).

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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

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	<pre>isplay column = total, i Diank space from last entry in 6 column ThisWorkbook.Sheets(1).Range("G" & numCells + 3).Value = sum '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 invisible ActiveSheet.Shapes.Item(1).Visible = False End Sub</pre>	

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

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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**.

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

Assign Macro	? ×
Macro name: MIP EX Template - Potential Change Order.xlsm'!CalculateTr	Edit Record
Macros in: All Open Workbooks Description OK	Cancel

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 $Outlook^{(0)}$ 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.

 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.

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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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