Reference Guide

CMiC Mobile v10x

By CMiC

CMiC | CONSTRUCTION SOFTWARE. EVOLVED

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CMiC Mobile Workspace

Document Release Note

This version of the *Mobile Workspace* guide is a draft release. The following updates are expected to be made in upcoming releases of the guide:

- MDM setup for Android devices will be finalized.
- MDM setup for Mobile Crew Time iOS will be finalized.
- The Punch List screen in CMiC Mobile Field will be finalized.

Overview – CMiC Mobile Workspace

CMiC offers a range of mobile products for smartphones, tablets and desktops that allow tasks in CMiC Enterprise to be performed remotely. These mobile products are designed to improve productivity and convenience by enabling personnel to perform Enterprise-based tasks anywhere and anytime, and by allowing secured access to current documents and data remotely. This facilitates smarter, informed decisions so that high-quality projects are completed on time and within budget.

Prerequisites

CMiC Mobile Workspace applications require mobile licensing and a CMiC Mobile server configured by CMiC database administrators. Please contact your account or project manager for more information.

Mobile Apps Licensing

The following table summarizes the mobile apps licensing information.

App	License Required	Connects To
Mobile Field app	PM Collaboration + Mobile Field licenses + Mobile Server	Mobile Server
Subcontractor Ratings app	Prequalification + Mobile Server	Mobile Server
Approvals app	ECM + Mobile Server	App Server / Collab Server
Time Tracker app	eTime + Mobile Server	Mobile Server
Mobile Crew Time app	eTime + Mobile Server	Mobile Server

App	License Required	Connects To
Paystub app	Self Service (HR) + Mobile Server	Mobile Server
eXpense app	ECM + Mobile Server	App Server / Collab Server

Payroll Application Setup (Crew Time/Time Tracker/Pay Stub/eXpense)

As the CMiC Payroll Mobile applications require E-Time login credentials and various tables from US Payroll, setup for these modules is required. Please refer to the *E-Time* and *US Payroll* guides for further assistance. The following tables provide a brief overview of the necessary setup for each module.

US Payroll

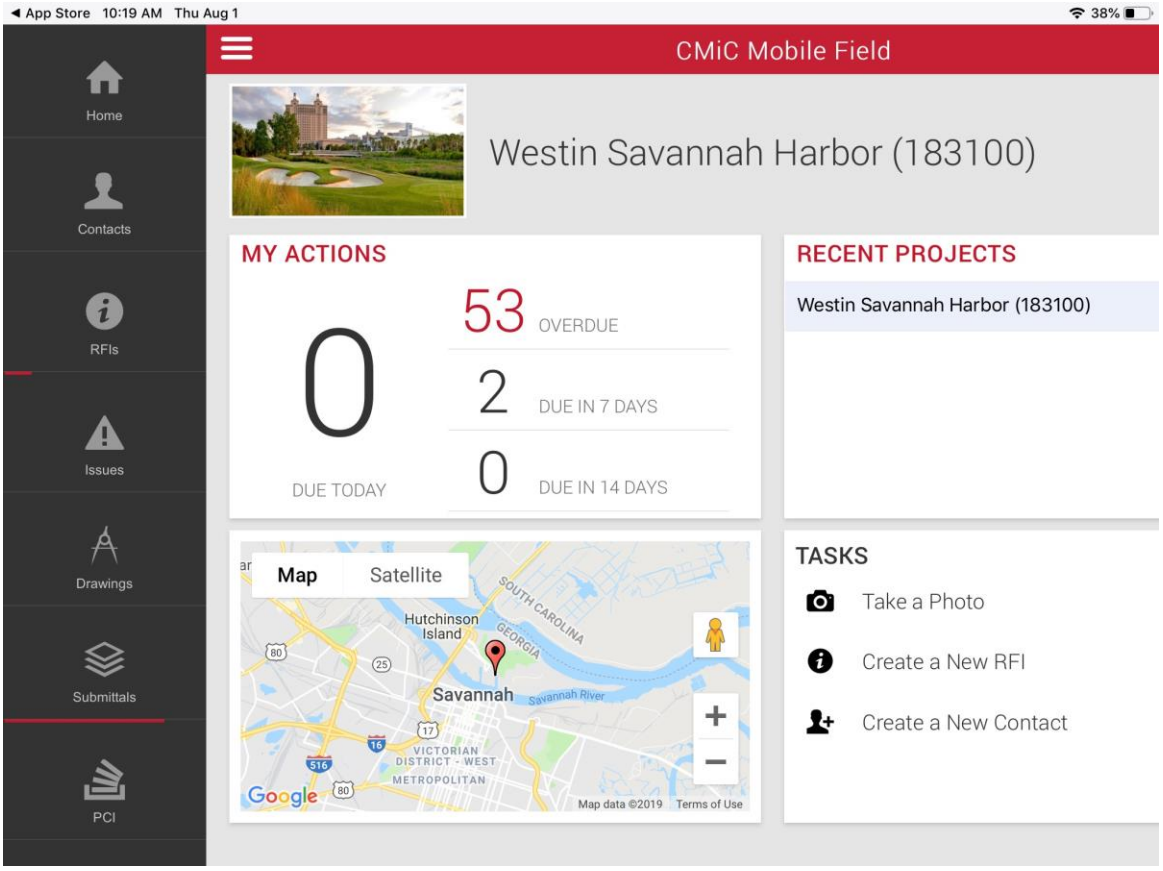
Task	Standard Treeview Path	Description
Create Company Code	General Ledger > Setup > Maintain Companies	A company code must be created before any other setup can be completed.
Create Chart of Accounts	General Ledger > Setup > Global Tables > Chart Codes	A chart of accounts is necessary to calculate taxes, employee benefits, and expenses.
Define Fiscal Year Start Date	General Ledger > Setup > Global Tables > Period Dates	Company taxes can only be correctly calculated by the Payroll module if the correct start date for the company fiscal year is given.
Create Employee Profile	US Payroll > Setup > Employees > Employee Profile	Employee profiles must be created to have employees in CMiC Mobile Workspace.
Create User Credentials and Assign them Security Groups	System > Security > User > User Maintenance, System > Security > Payroll Security > Assign Users to Security Groups	E-Time can only be used if a user is created and assigned to the relevant security groups.
Create Pay Runs	US Payroll > Setup > Local Tables > Pay Runs	Pay run setup is required in US Payroll before E-Time can be used.
Timesheet Period Setup	US Payroll > Setup > Company > Pay Periods	This screen can be used to declare the Timesheet input periods for E-Time.

E-Time

Task	Standard Treeview Path	Description
Create Pay Runs	US Payroll > Setup > Local Tables > Pay Runs	Pay run setup is required in US Payroll before E-Time can be used.
Timesheet Period Setup	US Payroll > Setup > Company > Pay Periods	This screen can be used to declare the Timesheet input periods for E-Time.
Access Code Setup	E-Time > E-Timesheet > Access Codes	Access Codes define the login details and passwords for E-Time. This means that employees do not require individual login credentials to the Enterprise database.
Access Code Setup	US Payroll > Setup > Employees > Employee Profile	If defining one employee with one access code the access code can be defined on the Employee Profile screen.
Access Code Administration	E-Time > E-Timesheet > Access Code Administration.	This screen is where employees, jobs, accounts, and administrators are assigned access codes.
E-Time Hour Types	US Payroll > Company Hour Types	This screen is for choosing which Other Hours hour types are available in E-Time.
Posting Controls	US Payroll > Company Control	This screen is for choosing whether non-billable hours will be posted to the Job Costing module.

CMiC Mobile Field

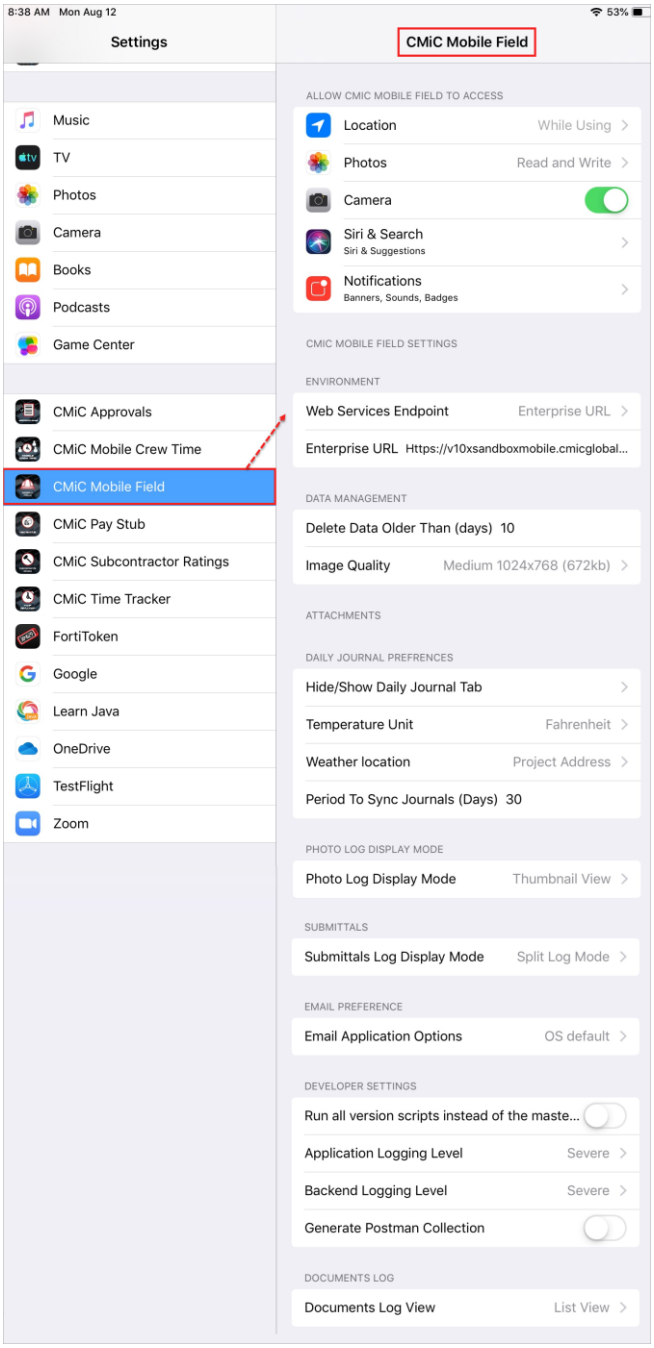
Overview – CMiC Mobile Field



Sample of Mobile Field's Home screen

CMiC Mobile Field is designed to enable personnel to perform field-based project management tasks anywhere and anytime, including collaborative efforts. Through this mobile application, users can remotely create and manage contacts, daily journals, punch lists, and photo records, and collaborate through the use of RFIs and issues.

App's Settings – iPad



Sample of iPad's Settings screen, with the CMiC Mobile Field app selected in the left pane and its settings displayed in the right pane

The iPad's Settings screen, launched by tapping the Settings icon , is used to configure CMiC Mobile Field and to set user preferences.

To configure CMiC Mobile Field, navigate to the CMiC Mobile Field Settings bundle, framed by the red rectangle in the above screenshot. On the screen's right pane, the settings for the app are displayed in sections. Information about the settings under these sections are provided by the following, corresponding sections:

Allow CMiC Mobile Field To Access

The settings that appear under this section depend on the device features being used for CMiC Mobile Field.

Location

This setting is used to set whether or not the app can access location. This access is required by the app so that it can perform tasks like acquiring local weather conditions in order to automatically fill in the weather details for new Daily Journal entries. Select "Never" to deny the app access to location, or "While Using the App" to grant it access to location when it is running.

NOTE: Under the Daily Journal Preferences section, the Weather Location field must be set to "Device GPS" for the Location setting to become available. Additional location settings can be found under the iPad's Privacy Settings.

Photos

Set whether CMiC Mobile Field can access the Photos app, which is used by the Photo Log screen.

Camera

Set whether CMiC Mobile Field can access the Camera app, which is used by various screens in CMiC Mobile Field.

Siri & Search

Set whether information from CMiC Mobile Field appears in Search, Look Up, Keyboard, and Lock screen. If turned on, Siri may learn from and make suggestions based on how the app is used.

Notifications

Allow Notifications	Set whether the app's notifications are to be pushed to the iPad's Notification Center. Even if a notification arrives when that app is not running, the Apple Push Notification service will alert the user of the notification through the iPad's Notification Center.
Lock Screen	Set whether notifications are displayed by the iPad's lock screen.
Notification Center	Set how many recent notifications can be displayed by the Notification Center.
Banners	Set whether to use banners.
Banner Style	If banners are turned on, choose whether they are temporary or persistent.
Sounds	Set whether a notification sound is used to notify the user of a new notification.
Badges	Set whether a badge appears on the apps icon to notify the user of new notifications.
Show Previews	Set previews to always show (default), show only when unlocked, or never.
Notification Grouping	Set whether notification grouping is used.

Environment

Web Services Endpoint

Public Cloud	If the user is a CMiC Cloud client, this setting must be turned on, as it turns on the multitenancy mode (tenant ID will be required by login screen), and the Enterprise URL field is not

	relevant. The database server and environment URL is automatically provided by the app.
Enterprise URL	If the user is a CMiC Enterprise client, this setting must be turned on and a URL must be entered in the Enterprise URL field.
CMiC Collaborate (Prod)	Select this option to use CMiC Collaborate's Production environment. If this option is turned on, the Enterprise URL field is not relevant.
CMiC Collaborate (Test)	Select this option to use CMiC Collaborate's Test environment. If this option is turned on, the Enterprise URL field is not relevant.

Enterprise URL

Specify the database server and environment for which the app is to connect.

The general format for this specification is as follows:

http(s)://*<server_name>*/*<environment>*/

e.g. http://testmobile.cmic360.com:7003/cmictestv10

Features

RFI

Set whether the RFI functionality is available in app.

Data Management

Delete Data Older Than (days)

Specify how old, in days, data needs to be before being deleted.

Image Quality

Specify the app's image quality for photos:

Low	512x315 (192kb)
Medium	1024x768 (672kb)
High	1536x1024 (1.3mb)

Daily Journal Preferences

Hide/Show Daily Journal Tab

Set which tabs are visible in the Daily Journal screen.

Temperature Unit

Select which temperature unit to use.

Weather Location

This setting is used to acquire local weather conditions in order to automatically fill in the weather details for new daily journal entries.

Select which weather location to use:

Device GPS	Accesses location by using the device GPS and uses that location to determine the weather conditions. **NOTE**: Location services must be turned on to use the device GPS for weather location.
Project Address	Uses the project address, as entered in the location for determining weather conditions.

Period To Sync Journals (Days)

Enter the period, in days, to sync the device's daily journals with the server. For example, if "30" is entered, then the app will list daily journals for the last 30 days.

Photo Log Display Mode

Photo Log Display Mode

Select the default display mode for the Photo Log screen:

List Mode	Lists photo log records in the left pane, and photo of selected record in the right pane.
Gallery Mode	Displays only photos.

Submittals

Submittals Log Display Mode

Select the default display mode for the Submittals Log screen:

List Mode	Displays submittals via a list, which includes details about their current stage. Screen loads quicker in this mode.
Split Log Mode	Displays list of submittals in the left pane, and currently selected submittal in the right pane.

Email Preference

Email Application Options

Select the default email application to use:

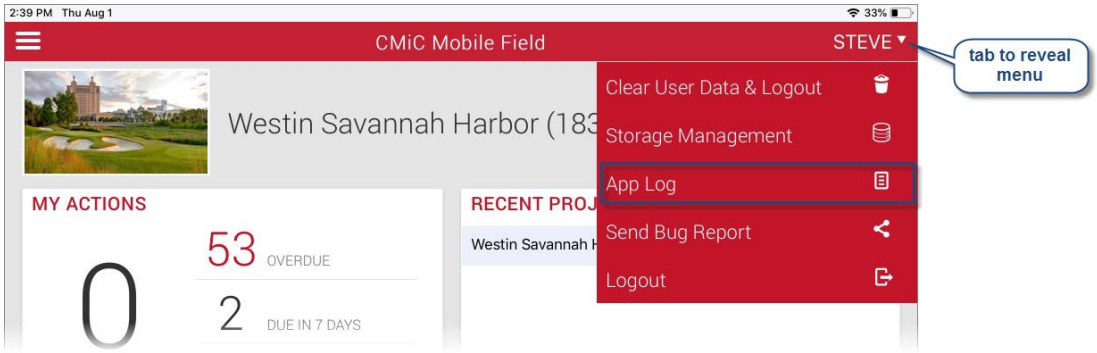
OS default	The email app set up as the default for the iPad will be launched. To return to Mobile Field, click the return link at the top-left of the email app.
Outlook	Microsoft's Outlook app will be launched. To return to Mobile Field, click the return link at the top-left of Outlook.

Developer Settings

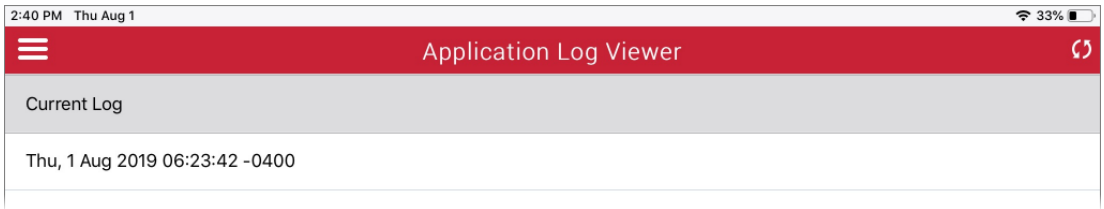
Run all version scripts instead of the master script

This setting is not relevant to typical users. It is used by CMiC developers.

Application Logging Level



Drop-down menu's option to launch the Application Log View screen



Sample of CMiC Mobile Field's Application Log screen.

This setting sets the level of detail for CMiC Mobile Field's log, which lists issues, and is viewed via the Application Log screen (second screenshot above). It is launched via the App Log option under the user ID drop-down menu, as shown in the first screenshot. The app's log contains entries created by the app during its operation that could be useful to CMiC in resolving an issue, should one arise.

The "Severe" setting causes the app to only log severe problems, and for the other settings, the lower down the list the setting is, the more information gets logged by the app.

Generate Postman Collections

This setting, when turned on, generates a collection of web service calls for use with the Postman tool.

MDM Setup

MDM Setup for CMiC eXpense – iOS

For MDM portals, the XML tags that the CMiC eXpense app supports are:

- publicCloud – for public cloud URL
- environmentURL – for server URL
- v10xEnvironment – for v10x environment

For example:

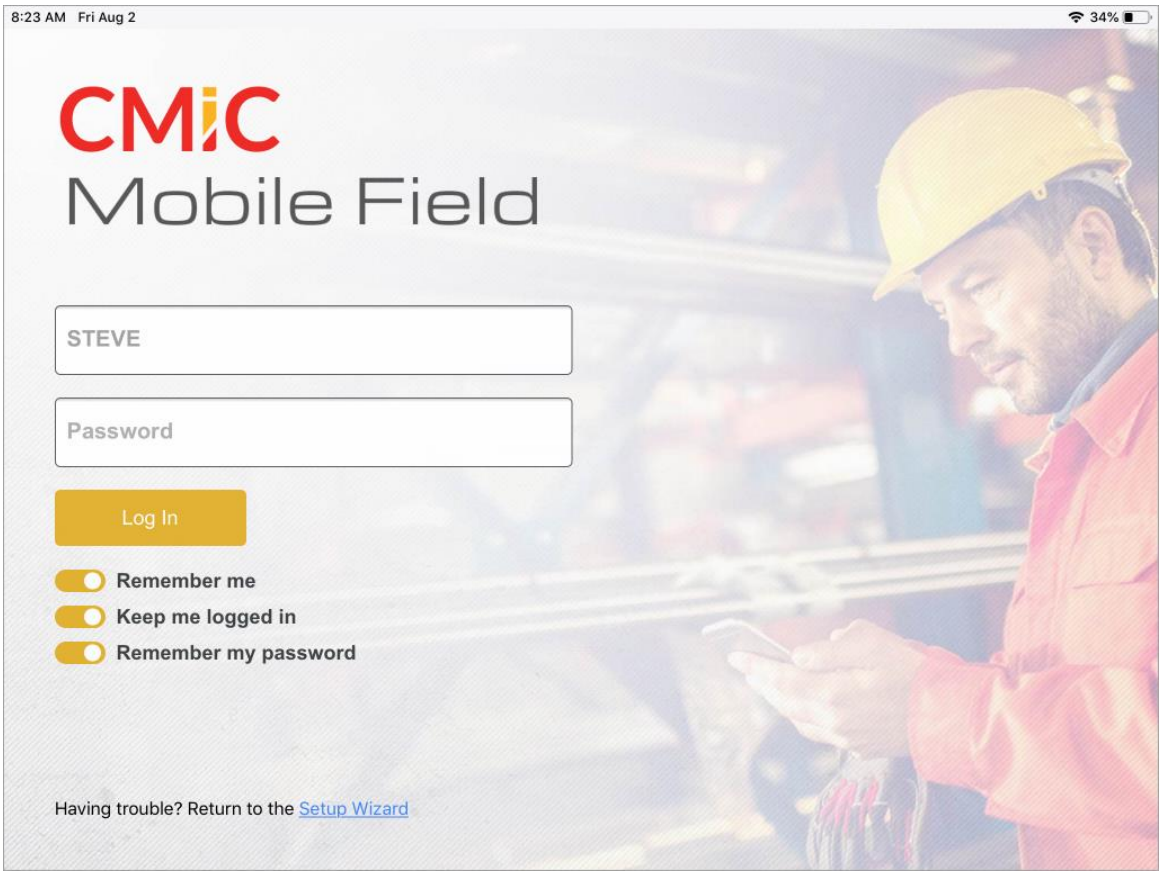
```
<dict>
  <key>publicCloud</key>
  <false/>
  <key>environmentUrl</key>
  <string>https://v10xsandboxwls.cmicglobal.com/cmicprod</string>
  <key>v10xEnvironment</key>
  <true/>
</dict>
```

MDM Setupfor Mobile Field via MS Intune

For details about how to create an MDM (mobile device management) setup for Mobile Field, please refer to the *MDM Setup for Mobile Field via MS Intune – Quick Guide* section at the end of this user guide.

Login Screen

When the Mobile Field app is launched, the following login screen is displayed for entry:

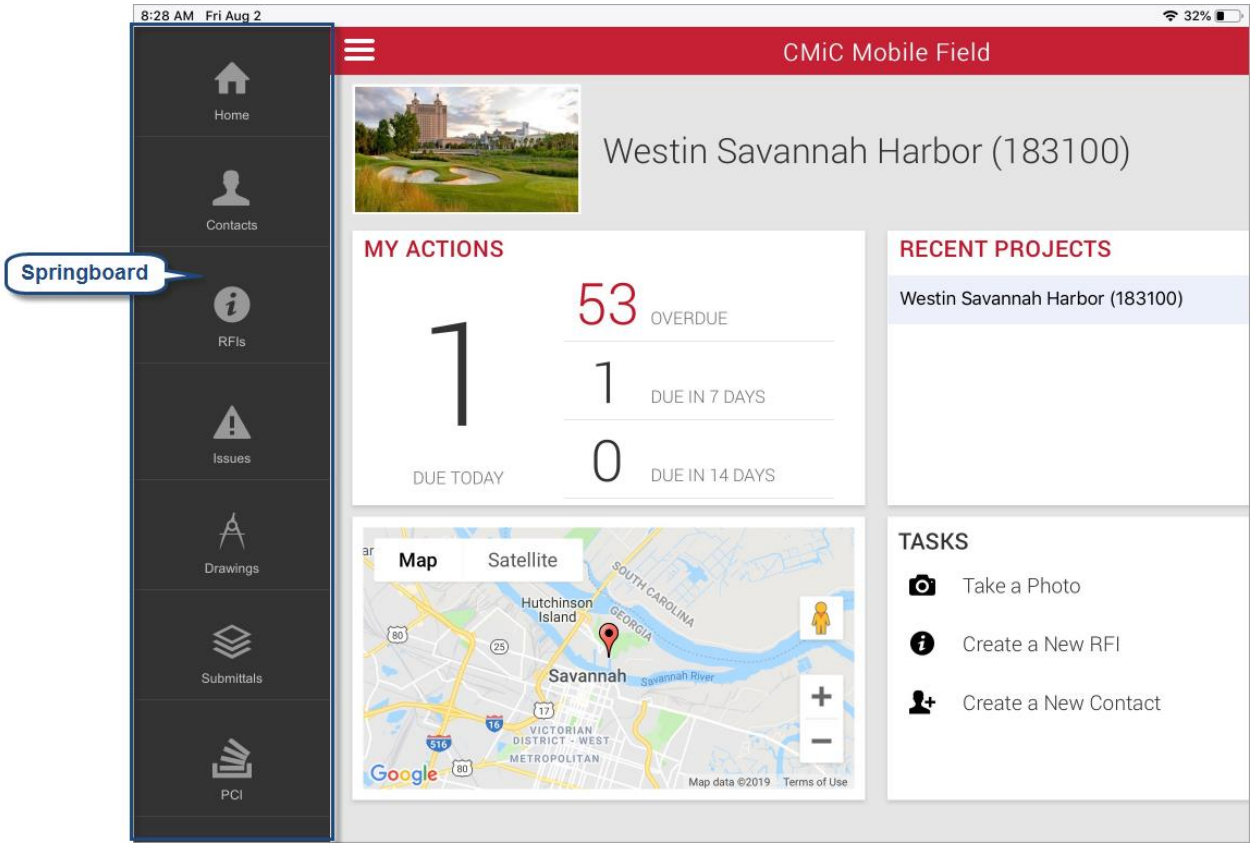


Once the credentials are validated and accepted, Mobile Field is displayed, showing the programs made available to the user via CMiC Field's security setups (see the following section, *Security Set Up for Mobile Field's Springboard*, for details).

NOTE: CMiC Field is formerly known as xProjects/Project Management.

Security Setup for Mobile Field's Springboard

Overview – Mobile Field Springboard Security



Sample of Mobile Field and its Springboard

This section outlines how to configure security access to Mobile Field's applications.

In Mobile Field, applications are accessed using its Springboard, and for each type of user, the applications available in the Springboard are set using the CMiC Field's JSP security roles and project roles.

Prerequisites for Springboard Security

Mobile Hotfix B26 was designed to only look for Springboard security in systems running patch 207 or higher – this is the patch where the security was introduced.

The user will need:

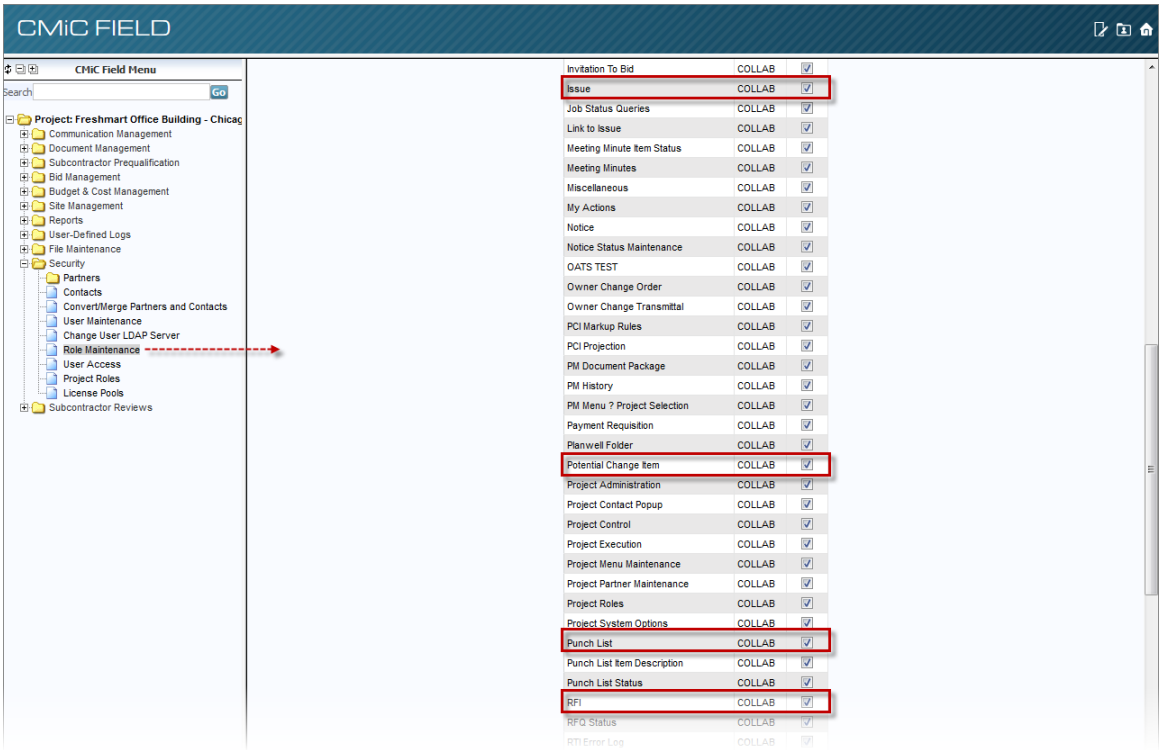
1. The PROD environment to be on patch 207 (or higher), as this patch contains the DB functions for the app to read security role setups.
2. Mobile Hotfix B26.

How Springboard Security Works

To determine which applications to add to Mobile Field's Springboard for a user, the system looks at the user's JSP security role and project role (PM role) security setups at the following levels. For an application to be available in the Springboard, the user must have access granted to it at all three levels:

1. JSP Security Role > Assign Programs: User must have access to CMiC Field's version of the application.
2. JSP Security Role > Assign Menu Item: User must have access to the application's JSP Treeview menu item.
3. Project Role: User must have access to corresponding Mobile Field application.

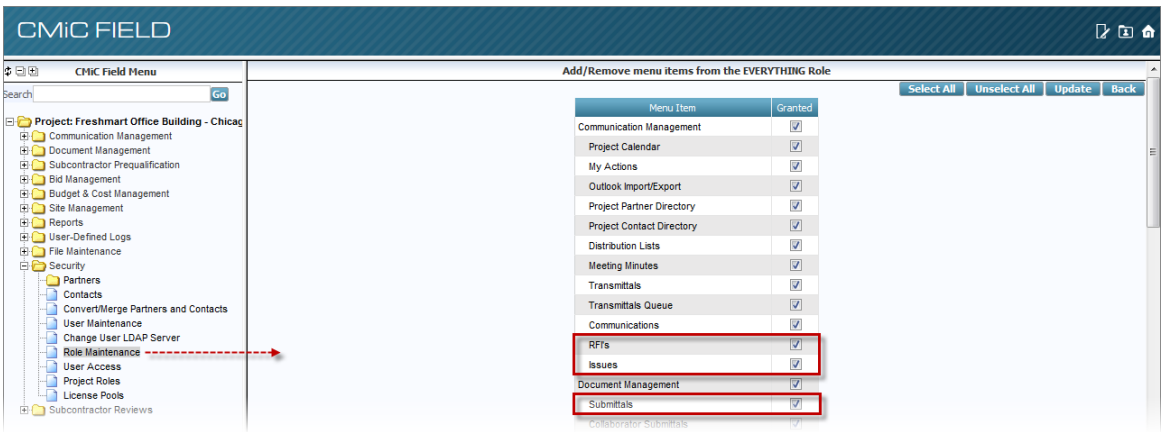
1. **JSP Security Role > Assign Programs**



Sample CMiC Field's Role Maintenance > Assign Programs screen, with programs in Mobile Field framed in red

For an application to be added to Mobile Field's Springboard for a user, rights to the CMiC Field's version of the application must be granted to the user using the Role Maintenance > Assign Programs screen.

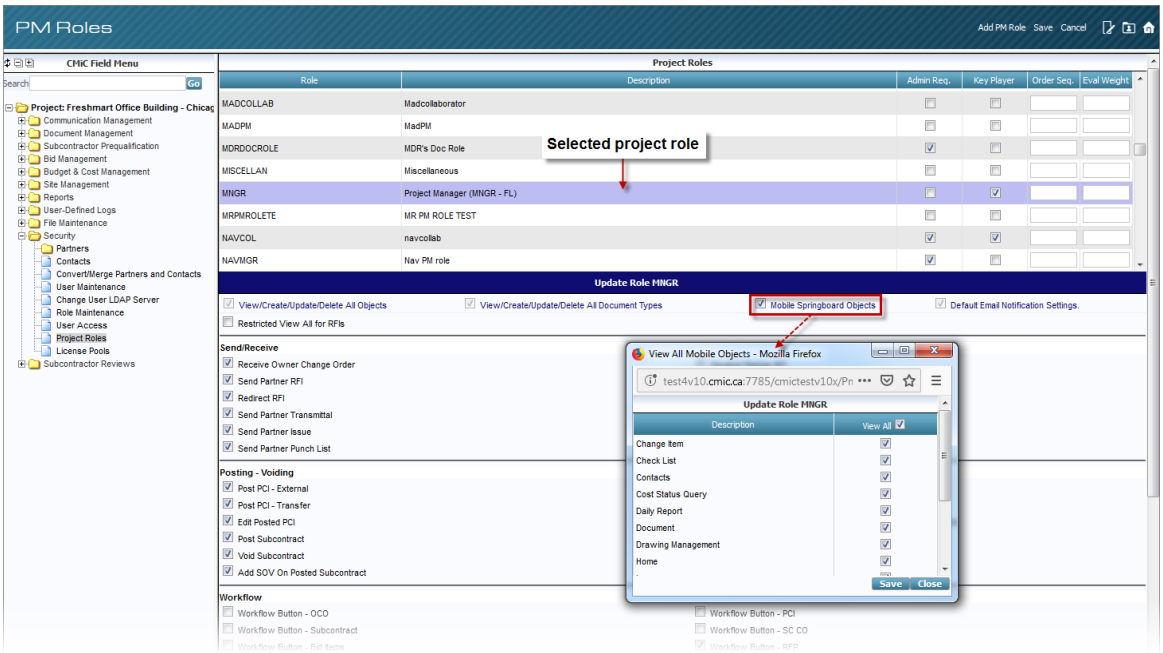
2. **JSP Security Role > Assign Menu Items**



Sample of CMiC Field's Role Maintenance > Assign Menu Items screen, with items relevant to Mobile Field framed in red

Also, for an application to be added to Mobile Field's Springboard for a user, rights to the Treeview menu item for the CMiC Field's version of the application must be granted to the user using the Role Maintenance > Assign Menu Items screen.

3. **Project Role** (PM Role)



Sample of Mobile Springboard Objects popup in CMiC Field's Project Roles screen

Lastly, for an application to be added to Mobile Field's Springboard for a user, rights to the mobile application must be granted to the user's project role. This is done using the Mobile Springboard Objects pop-up window in CMiC Field's Project Roles screen, as shown above.

The project roles assigned to CMiC Field users are found in their contact records.

Special Notes for Checklist & Contacts – Temporary Exceptions

These temporary exceptions for the Checklist and Contacts screens are only for JSP security role privileges, not for project role privileges or Mobile Springboard privileges.

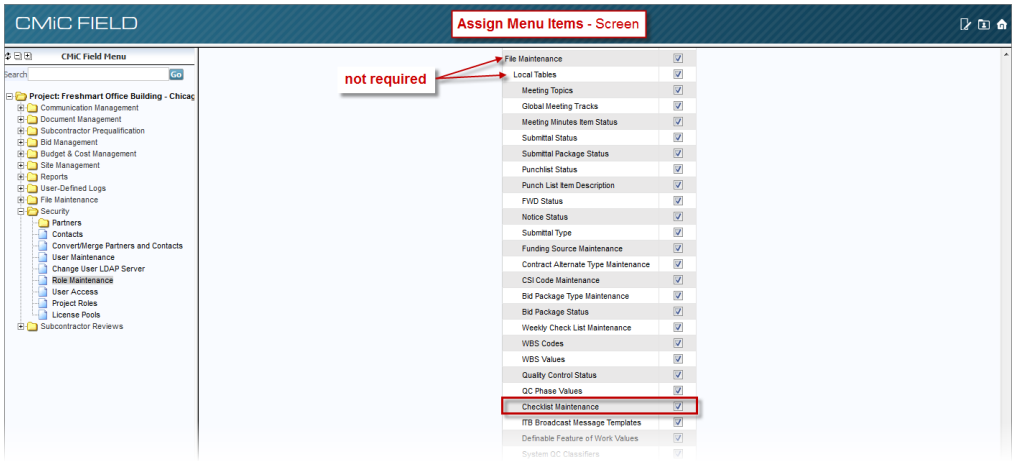
Checklists – Mobile Field Screen

JSP Security Role – Set Up Exception

1. **Assign Programs** (Not Required)

   Currently, no program privilege is required for checklists.

2. **Assign Menu Items** (Required)



Assign Menu Items screen

Currently, as checklist types are user defined, Mobile Springboard security only looks at the Checklist Maintenance menu item privilege (*Security > Role Maintenance > Assign Menu Items > File Maintenance > Local Tables > Checklist Maintenance*) to determine if the user has rights to Mobile Field's Checklist screen.

NOTE: The parent File Maintenance and Local Tables privileges are not required.

Contacts – Mobile Field Screen

JSP Security Role – Set Up Exception

1. **Assign Programs** (Required)

   Currently, to grant a user's JSP security role access to contacts in Mobile Field, the Contact Maintenance Program privilege (*Security > Role Maintenance > Assign Programs > Contact Maintenance*) is required.

2. **Assign Menu Items** (Required)

   The Contacts menu item privilege (*Security > Role Maintenance > Assign Menu Items > Security > Contacts*) is also required.

   NOTE: The parent Security privileges is not required.

Recommended Practice – Mobile Field Security Setup

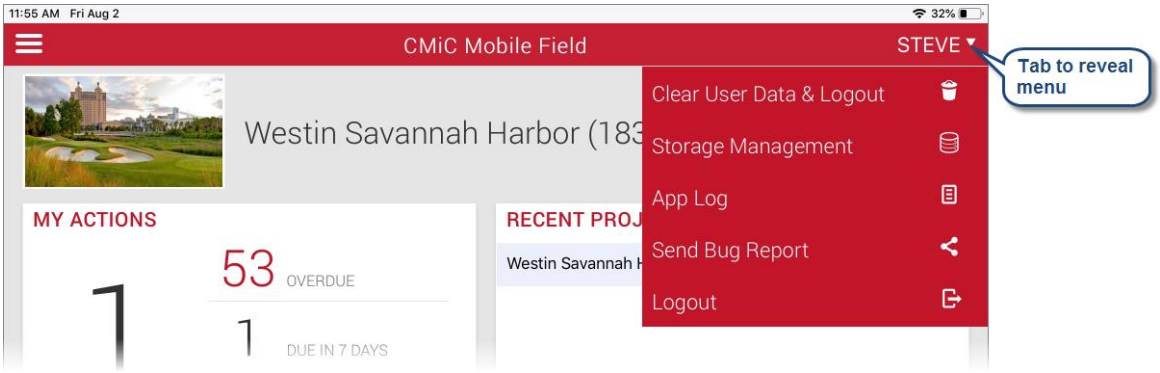
As stated in the beginning of the *How Springboard Security Works* section, for an application to be available in the Springboard, the user must have access granted to it at all three of the specified levels.

So, to set up a user's security for Mobile Field, we recommend starting by granting their project role access to all the Mobile Field applications by checking all the boxes in the Mobile Springboard Objects pop-up window (shown in the previous section) in the Project Roles screen.

This way, the user's security access to CMiC Field's versions of the mobile apps simply determines the user's access to the mobile versions.

App's Main Controls

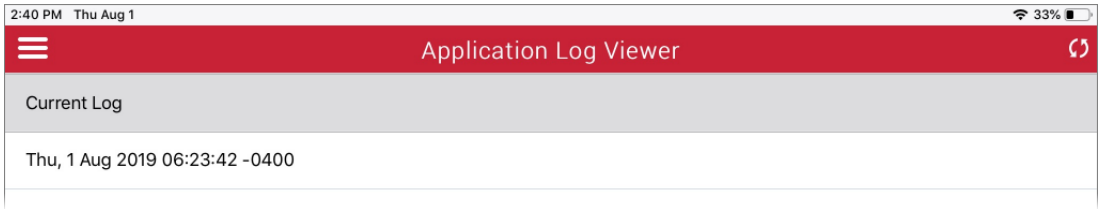
User Drop-Down Menu



Clear User Data & Logout

Tab to delete all records and the Application Log's data from the mobile device and log out.

App Log



Sample of CMiC Mobile Field's Application Log screen

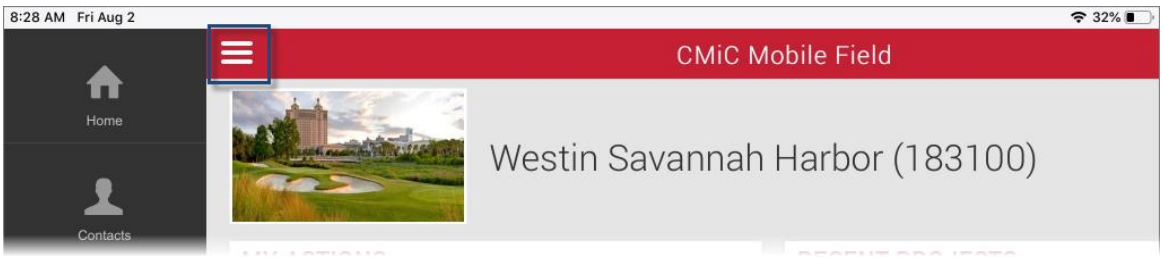
Launches the Application Log Viewer screen, shown above, to view the app's activity log. The app's log contains entries created by the app during its operation that could be useful to CMiC in resolving an issue, should one arise.

A setting is available to control the level of detail for the log. See the *Developer Settings* subsection under *App's Settings – iPad* for details.

Logout

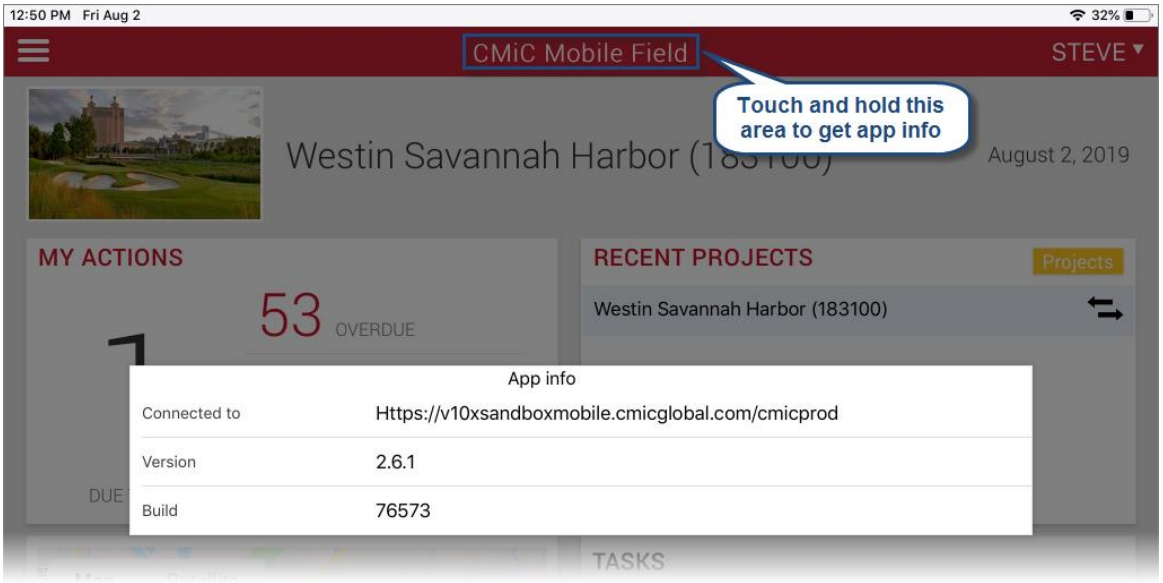
Logout and return to the Login screen.

Main Menu Toggle



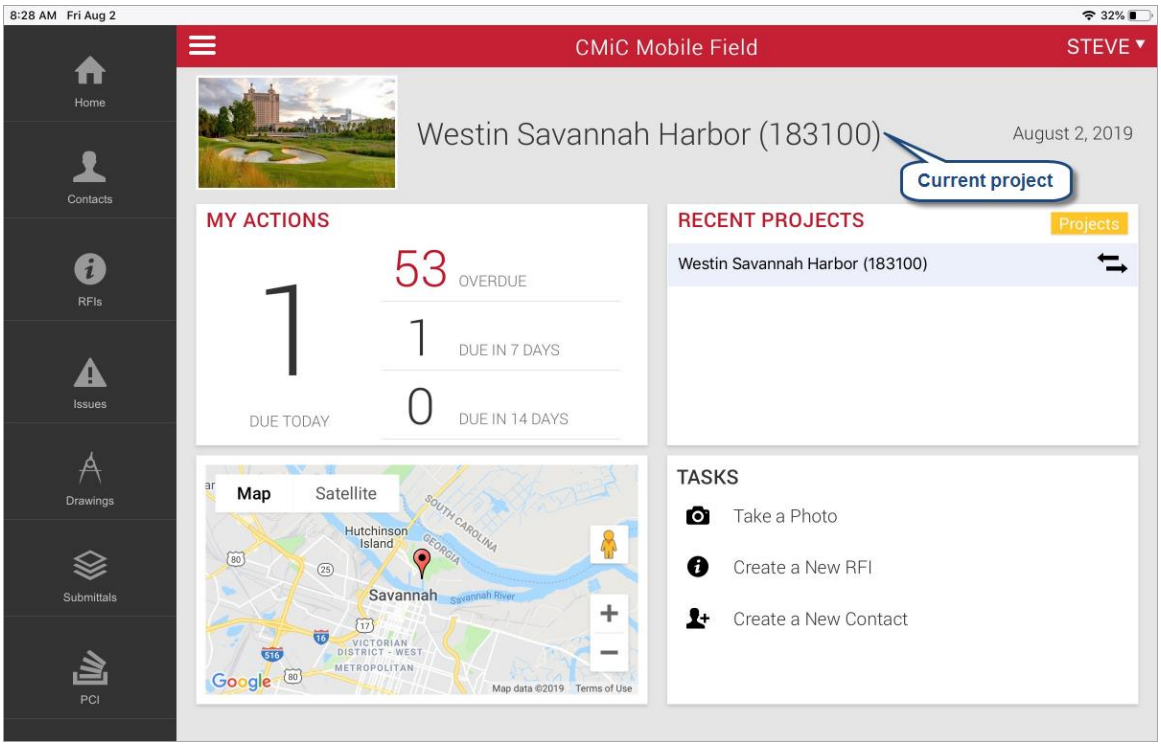
Tap to hide/reveal the main menu, along the left side of the screen.

Application Information – Connected Server & Build Number



Mobile Field's build number and the server to which it is currently connected to can be seen by touching and holding the CMiC Mobile Field header at the top of the screen, as illustrated above.

Home – Screen



The Home screen, accessed by tapping the

button, is the app's main screen. It displays the app's currently loaded Project at the top, and it contains the following panes:

- My Actions pane to display action item statuses.
- Recent Projects pane to load other projects.
- Project Map pane with map centered on the loaded project's location.
- Tasks pane with links for performing common tasks.

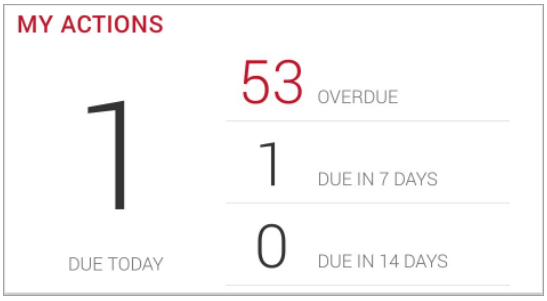
The photo displayed to the left of the project's name is specified via the Project Photo URL field in the Collaboration section on the General tab of the Project Maintenance screen.

The records available in the other screens of this app are for the current project. To view records for a different project, the desired project must be loaded. See the *Recent Projects* section for details about loading projects.

The top-right corner of the screen has a drop-down arrow that, when expanded, shows the Logout menu item. This will log the user out of the application.

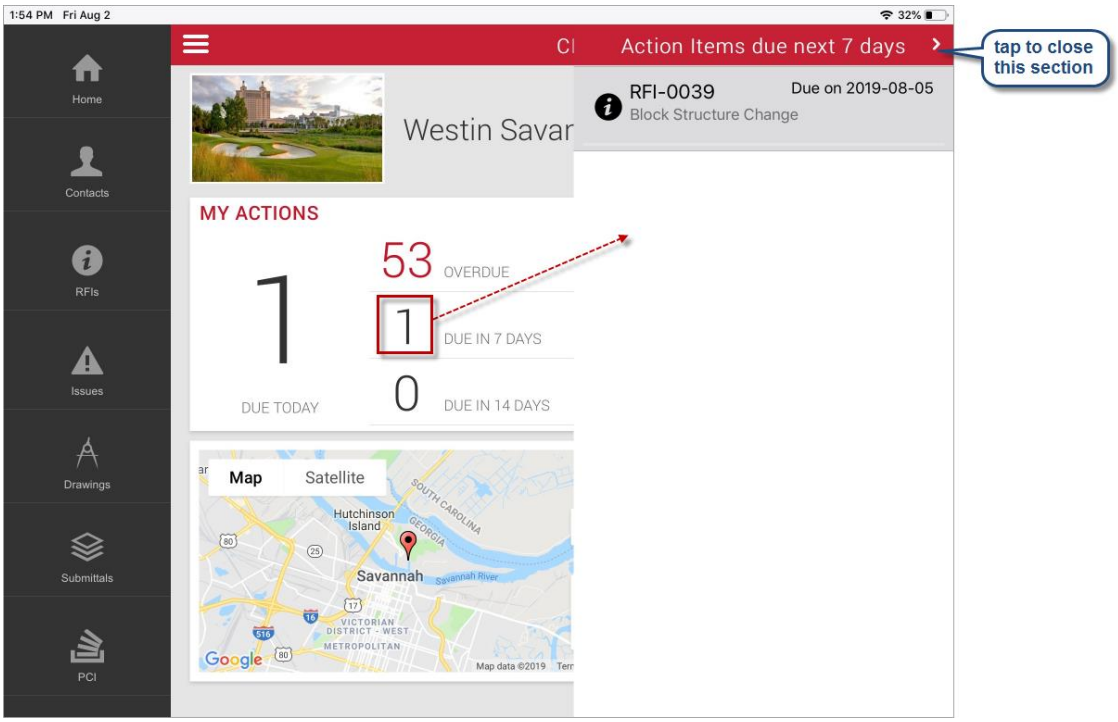
Tap the button to hide the menu bar on the left, giving the user more real estate to work with the current screen. Use this button to toggle between both views.

My Actions



This Home screen section displays the number of action items for the current user, as per the user's project calendar. As shown above, the items are separated into the following categories: Due Today, Overdue, Due In 7 Days, and Due In 14 Days.

As shown below, tap a corresponding number to display the action item(s). If the action item is an RFI, the user can tap it to launch the RFI screen in order to view it and perform any necessary actions with it.



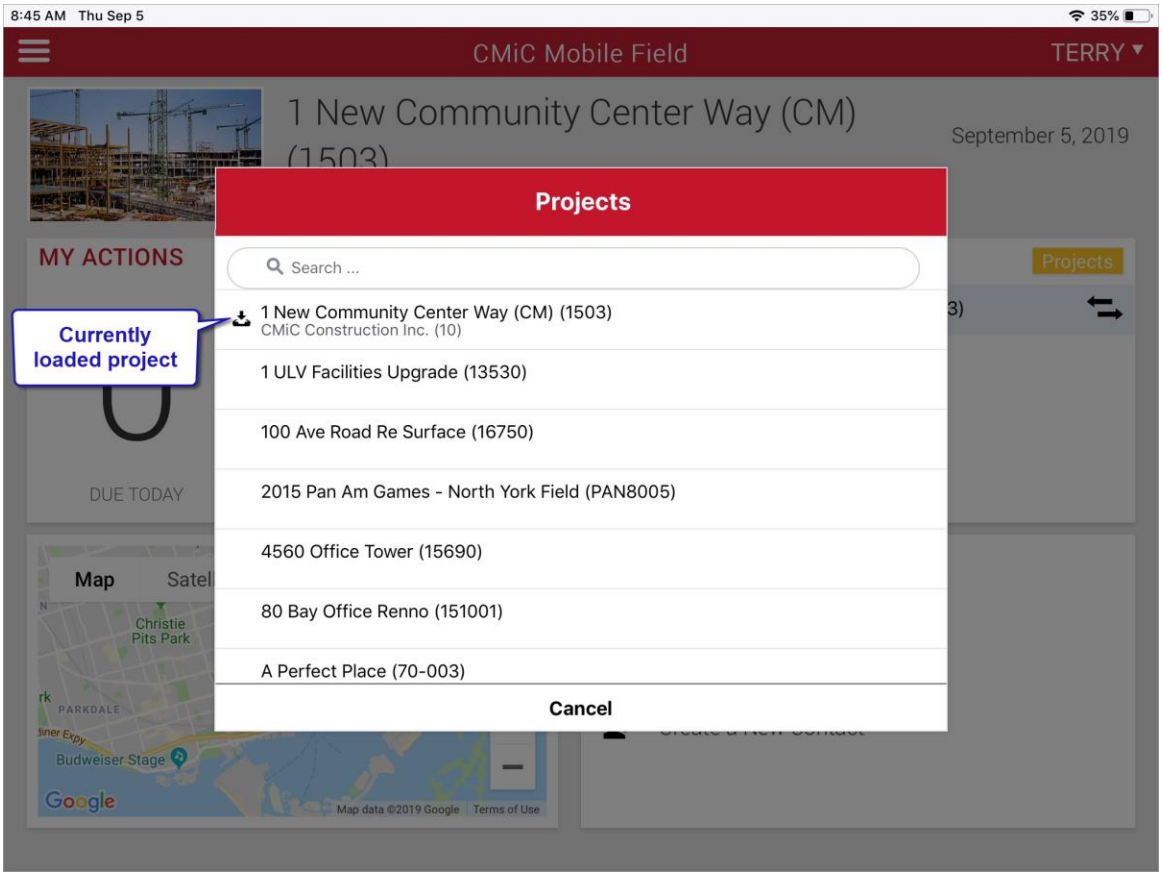
Recent Projects

This area displays the projects that were recently accessed by the current user, with the current project at the top of the list. It is used to reload the currently loaded project or to load a different project. All screens of CMiC Mobile Field display data that is associated to the currently loaded project.

Reload Current Project or Load Listed Project

Refresh the currently displayed project, which is at the top of the list, by tapping its corresponding Refresh Arrows icon, or display a different recent project by tapping its Refresh Arrows icon.

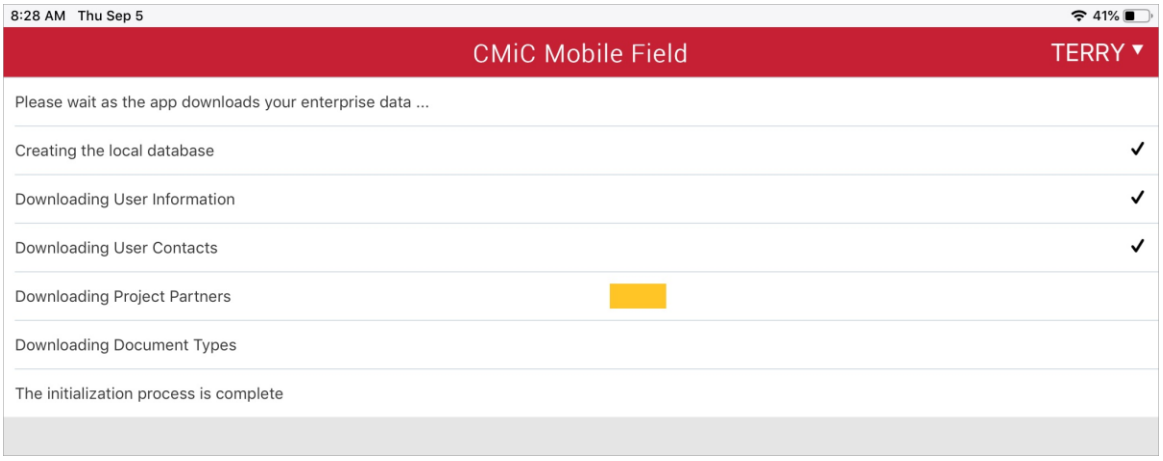
Load Unlisted Project



To load a project into CMiC Mobile Field that is not displayed in the Recent Projects section, tap the yellow [**Projects**] button. As shown in the above screenshot, a list of projects to which the user has access to is displayed in a pop-up window.

If necessary, enter a search phrase to find a specific project. Tap the project to load into CMiC Mobile Field, and the loading process will begin.

The following screen will be displayed, with a yellow bar progressing to each item that is being refreshed, until it is completed:



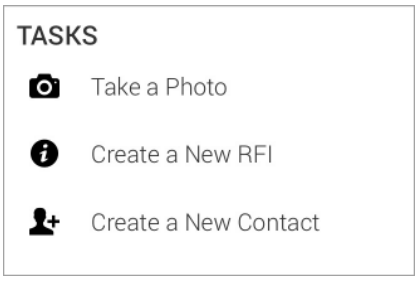
Once finished, the screen will automatically return to the Home screen.

NOTE: The screen above will only appear when a project is loaded for the first time within Mobile Field.

Project Map

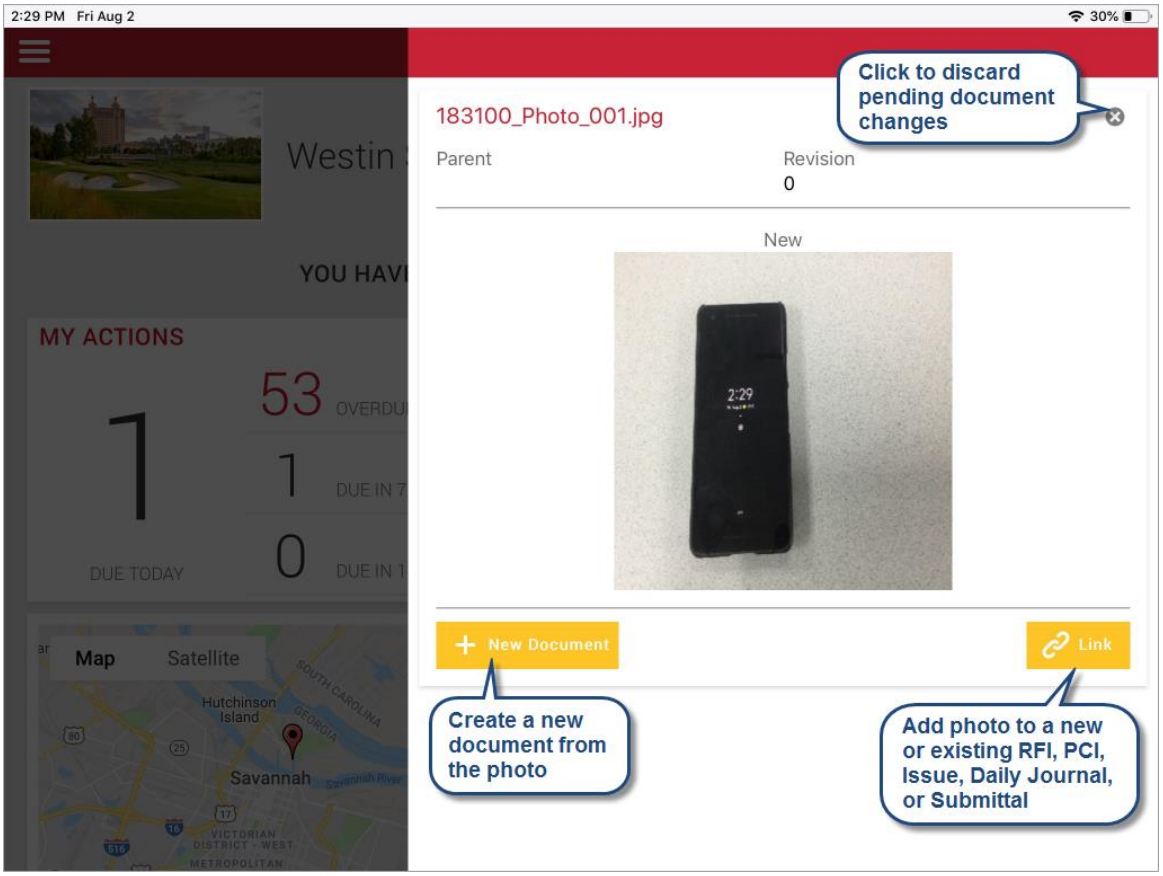
The Home screen's Project Map section displays the project's location, as entered via the Project Address field on the General tab of the Project Maintenance screen.

Tasks



This Home screen also provides a section of shortcuts for tasks the user might perform on a regular basis, as shown in the above screenshot.

Take a Photo



This option allows the user to take a photo without leaving CMiC Mobile Field in order to add it to a daily journal, RFI, PCI, issue, or submittal. The photo is saved to a photo log record, which includes a date, name, description, and a comment.

NOTE: After a photo is added to one of the possible objects, it may take a few minutes before it shows up for the object.

Take a Photo

After selecting Take a Photo from the Tasks section, the Camera on the device will open and allow the user to take a photo. Once a photo has been captured, tap the Use Photo option to open the Photo Display area, shown in the above screenshot.

Next, click on the [**Link**] button to add the photo to a new or existing object, or click on the [**New Document**] button to create a new document from the photo.

Add Photo to New RFI

Tap on the [**Link**] button, select the New Object tab, and click on RFIs for the Create RFI Local screen to open. Scroll down, by swiping, to see the photo attached to the bottom of the new RFI.

Enter the data that is needed and tap [**Save**] or [**Submit**]. [**Save**] saves the record with a status of pending in RFI drafts. [**Submit**] saves the record with a status of open in the RFI log. In both cases, the message "RFI Created" will be displayed. A new RFI record will be created and the photo log record will be attached to the new RFI.

When the Add to Existing tab is selected and [**RFIs**] is tapped, the Select an RFI screen opens and the user can select an RFI. Tap the [**Add To Selected**] button to attach the photo to the existing RFI.

The RFI can be accessed through the RFIs screen by selecting the RFI group ("Drafts" or "RFI Log") to which it was saved. See the *RFIs – Screen* section for details.

Add Photo to Daily Journal

Tap on the [**Link**] button, select the New Object tab, and tap on [**Daily Journals**] for the new Daily Journal screen to open. Scroll down by swiping to see the photo attached to the bottom of the new daily journal.

When the Add to Existing tab is selected and [**Daily Journals**] is tapped, the Select a Journal screen opens and the user can select a daily journal. Tap the [**Add To Selected**] button to add the photo to the existing journal.

The daily journal entry can then be completed through the Journal screen. See the *Create New Journal* section for details.

Add Photo to PCI

Tap on the [**Link**] button, select the New Object tab, and tap on [**PCI**] for the New PCI screen to open. Scroll down by swiping to see the photo attached to the bottom of the PCI.

When the Add to Existing tab is selected and [**PCI**] is tapped, the Select a PCI screen opens and the user can select a PCI. Tap the [**Add To Selected**] button to add the photo to the existing PCI.

The PCI entry can then be completed through the PCI screen. See the *Create PCI* section for details.

Add Photo to Issue

Tap on the [**Link**] button, select the New Object tab, and tap on [**Issue**] for the Create Issue Local screen to open. Scroll down by swiping to see the photo attached to the bottom of the issue.

When the Add to Existing tab is selected and [**Issue**] is tapped, the Select an Issue screen opens, and the user can select an issue. Tap the [**Add To Selected**] button to add the photo to the existing issue.

The issue entry can be completed through the Issue screen. See the *Create Issue* section for details.

Add Photo to Submittal

Tap on the [**Link**] button, select the Add to Existing tab, and tap on [**Submittal**] for the Add to Submittal screen to open. The user can select a submittal, then tap the [**Add to Selected**] button to add the photo to the existing submittal.

The submittal can be accessed through the Submittals screen. See the *Submittals – Screen* section for details.

Create a New RFI

An RFI can be quickly created by tapping this option.

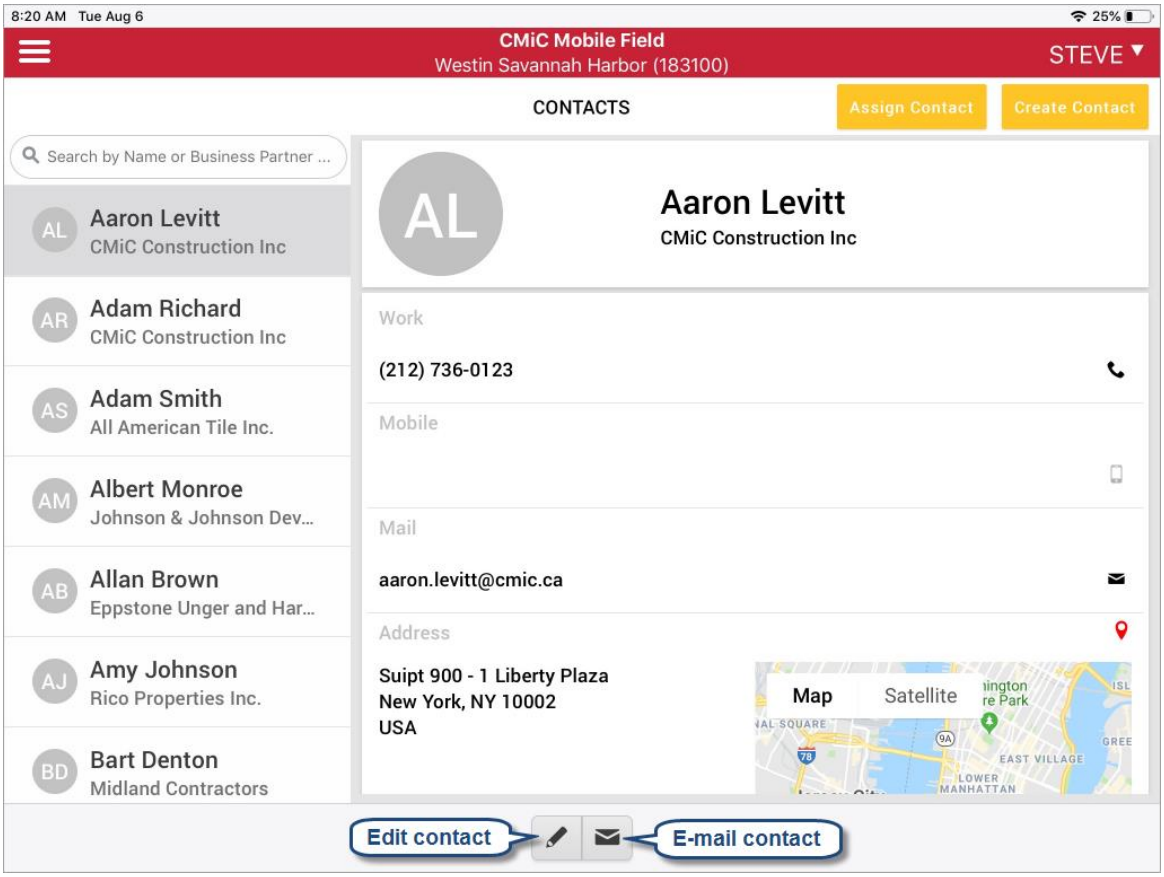
Please refer to the *RFIs – Screen* section for details about creating RFIs.

Create a New Contact

Tap this button to quickly create a new contact from this screen.

Please refer to the *Contacts - Screen* section for details about creating contacts.

Contacts – Screen



Tap the Contacts menu option

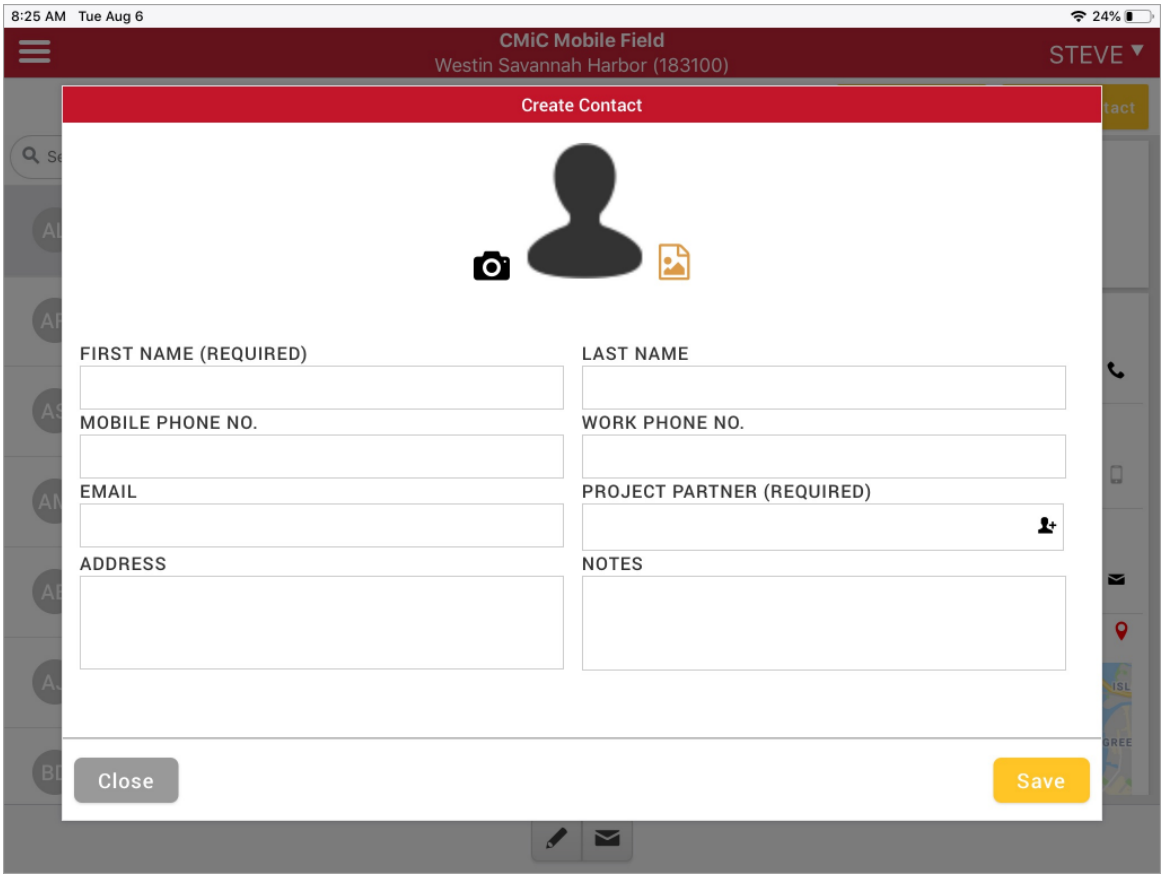
to display the Contacts screen, shown above.

Contact records are listed in the screen's left pane, and a selected contact is displayed in the right pane.

The Search field, above the left pane, allows the user to enter a search phrase to quickly find a contact. Alternatively, the user can swipe through the contacts, which are ordered alphabetically, by first name and then last name.

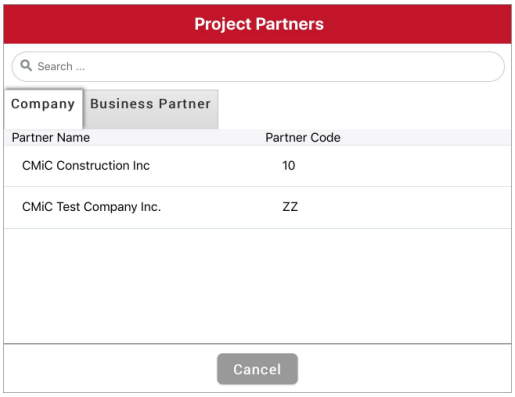
Create Contact

To create a contact, tap [**Create Contact**], and the screen below is displayed.

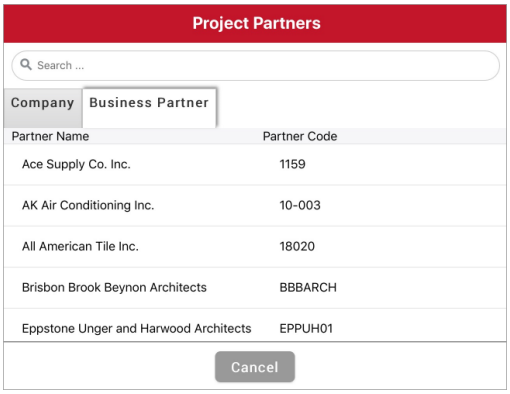


Enter all required fields and any other fields that apply.

Tapping the Project Partner field launches a pop-up window that displays two tabs called Company and Business Partners. The selected tab is white, while the unselected tab is gray. Use these tabs to select the company or business partner associated to the contact.



Sample of Company tab selected.



Sample of Business Partner tab selected.

Add Photo of Contact

Tap the Camera icon to take a photo of the contact in order to add it to the contact's record.

If the contact's photo is already saved in the mobile device, it can be added using the Image icon .

Tap [**Save**] when finished.

Edit Contact

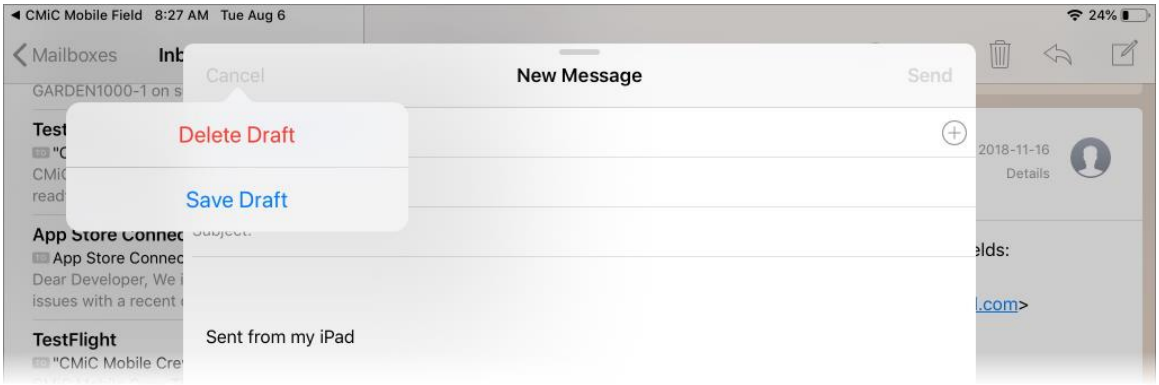
To edit a contact, select the contact and tap the Edit icon at the bottom of the screen. Make the changes and tap [**Save**].

Send Email to Contact

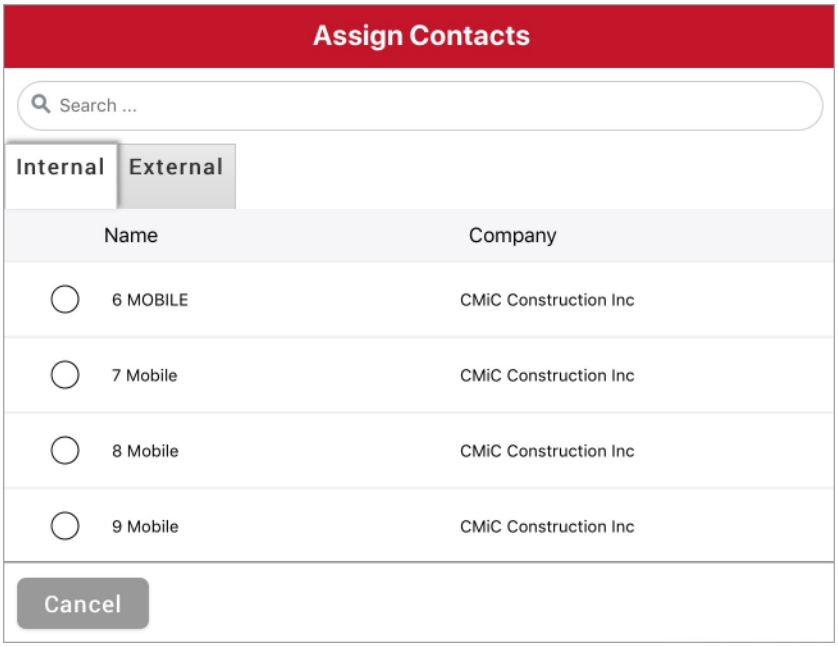
NOTE: The Email icon is only visible if an email address exists for the contact.

In the left pane, tap the contact to send an email to, then tap the Email icon , and the New Message window in the Mail app is displayed. Enter the message and tap [**Send**].

If necessary, save a draft of the message until it is ready to be sent. This is done by tapping the [**Cancel**] button, then [**Save Draft**], as shown in the following screenshot:



Assign Contacts to Project

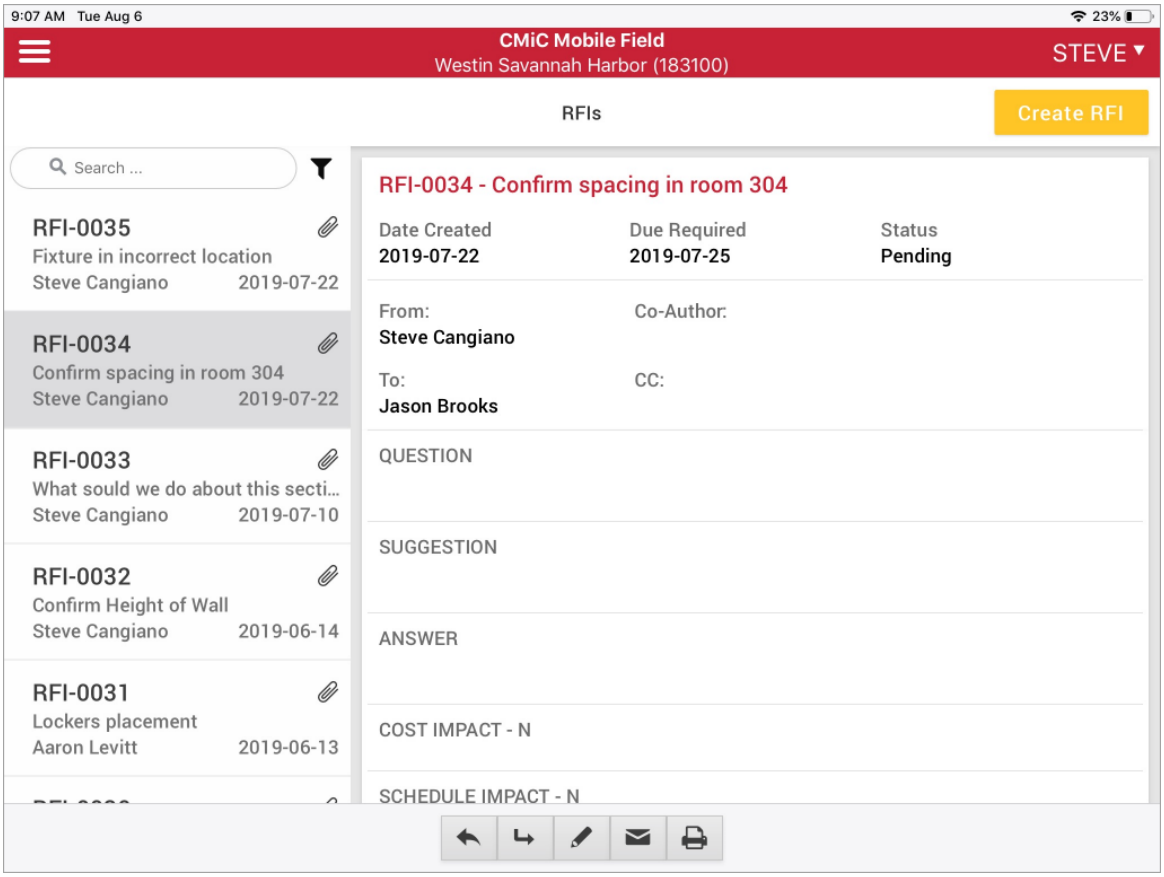


To assign an existing contact to the current project, tap [**Assign Contact**], and the above pop-up window is displayed.

The Internal tab lists internal contacts, and the External tab lists external ones. Contacts are sorted by first name, then last name, and multiple contacts can be selected for assignment by tapping the circle beside each contact. Tap the [**Assign**] button after making a selection.

On the Home screen, refresh the project to see that the assignment has taken effect.

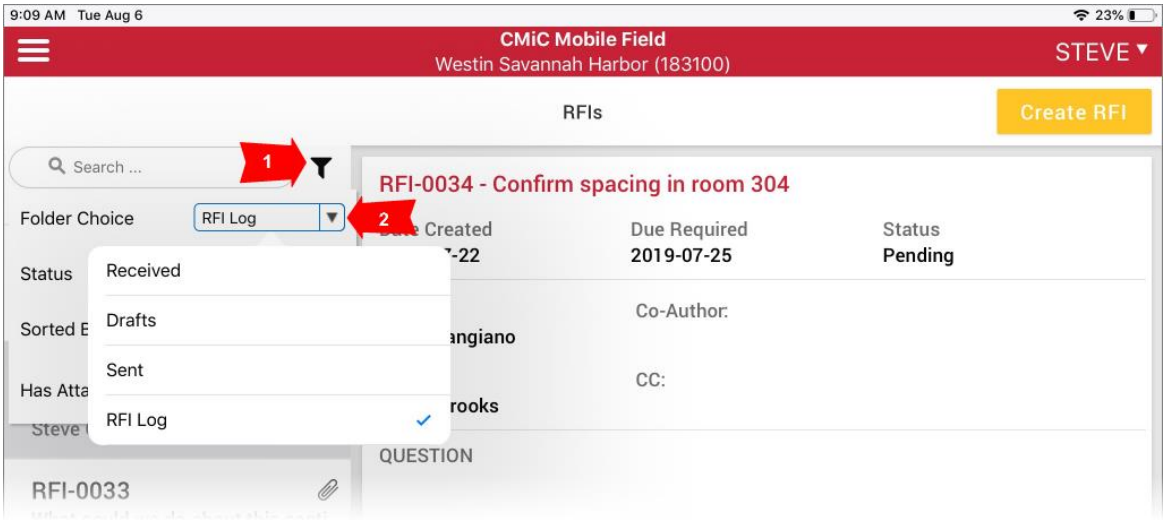
RFIs – Screen



Tap the RFI menu icon to display the RFIs screen, which is used to create, view, and respond to RFIs on-site. Created or modified RFIs can be saved to the mobile device until they are ready to be submitted into the system, and once submitted, they are distributed and available in CMiC Field.

This screen lists RFIs in the left pane, and the selected RFI's details are displayed in the right pane. To refresh the list of RFIs, swipe down on the list.

As shown below, tapping Filter icon, then the Folder Choice field's selection box arrow displays the different categories in which RFIs are grouped: "Received", "Drafts", "Sent", and "RFI Log". The selected type is check marked, as shown below.



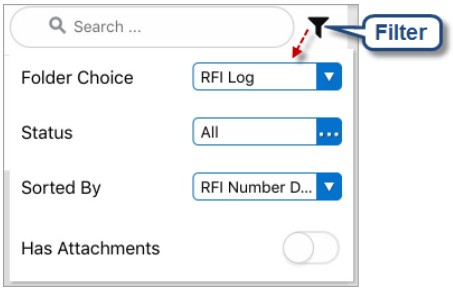
For details about RFIs, please refer to the *Working with RFIs* section of the *CMiC Field* reference guide.

RFI Actions

The following table shows the action performed by each icon:

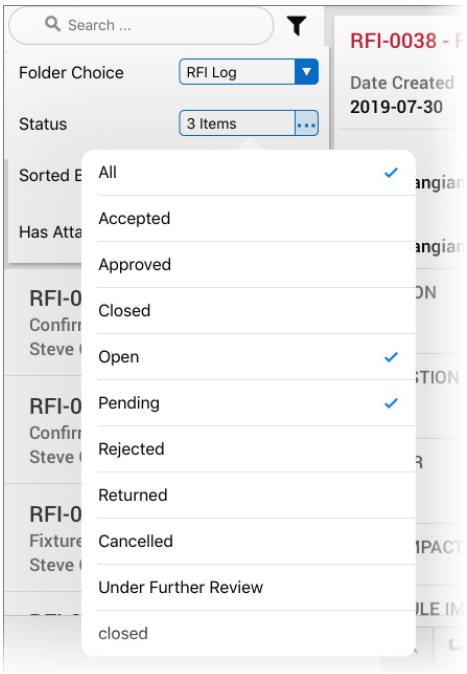
RFI Actions	
	Respond
	Redirect
	Edit
	Forward
	Send I/O email
	Email report
Actions Available in Edit Mode	
	Attach photo saved on device
	Capture photo & attach to RFI

Search & Filter RFIs



The Search field is used to search through the RFIs on the mobile device. To search for an RFI, tap the Search field, enter the text to search against, and tap the device's Return keyboard key. Search text can be searched against the following RFI fields: Question, Number, Answer, and Subject.

To filter the listed RFIs, tap the Filter icon to display the available filter parameters for RFIs, as shown above. The Status parameter carries a multi-select LOV from which multiple RFI statuses can be selected to filter against. A blue checkmark indicates which statuses are selected, as shown below:



To only list RFIs with attachments, enable the Has Attachments toggle.

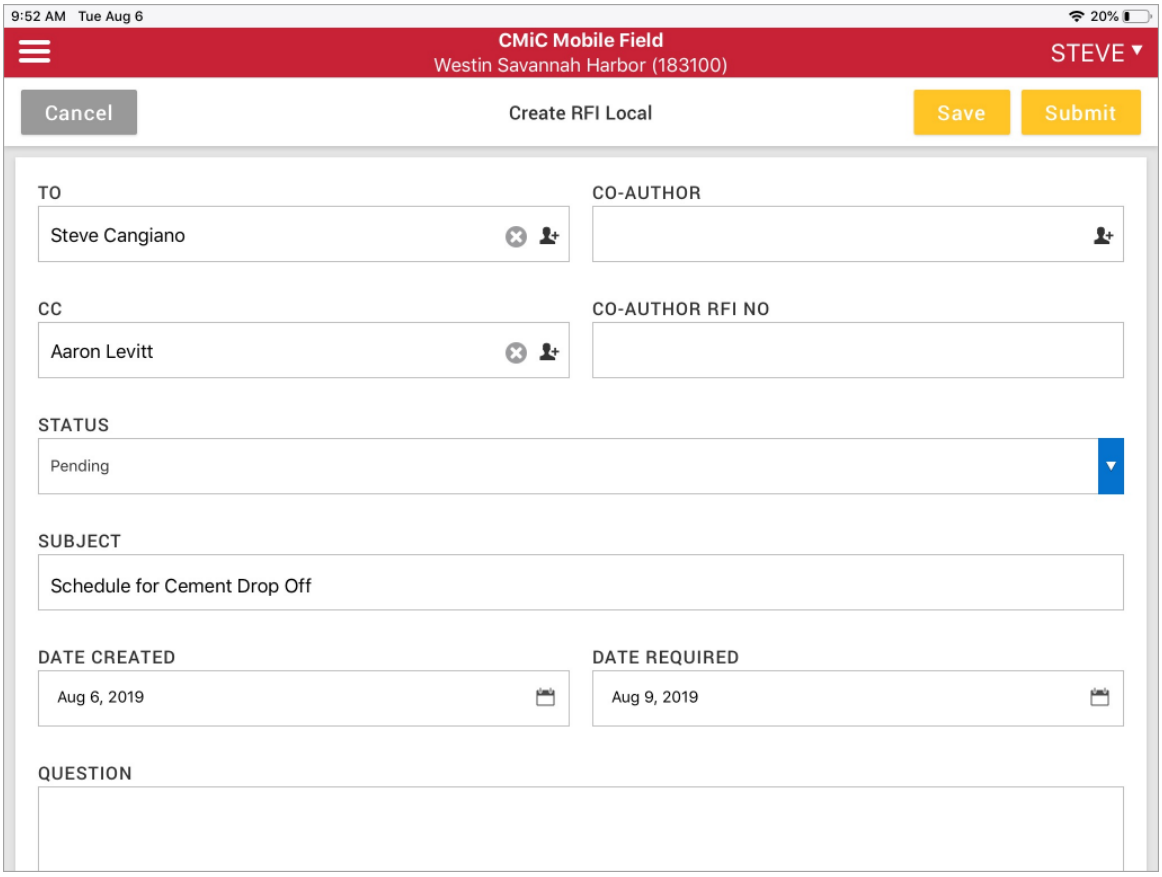
Filtered results can be sorted by selecting a sort sequence via the Sorted By field. The default sort sequence is "RFI Number Descending".

Tapping the Folder Choice field's selection box arrow displays the different categories in which RFIs are grouped: "Received", "Drafts", "Sent", and "RFI Log". A blue checkmark indicates which groups are selected.

When a filter parameter is in use (e.g. "All" is not selected from the Status LOV) or the Sorted By field is not set to its default ("RFI Number Descending"), the color of the Filter icon changes from black to green to indicate it is active.

NOTE: If the filter is in use, the Search field can be used to search the list of filtered RFIs.

Create RFIs

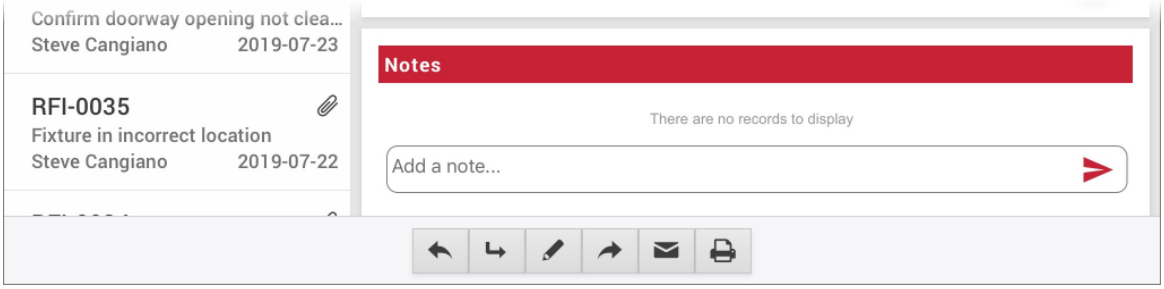


To create an RFI, tap the [**Create RFI**] button. The screen above will be displayed. Enter all required and relevant data and tap [**Save**] or [**Submit**].

[**Save**] will save the RFI to the drafts type and keep it in a pending status.

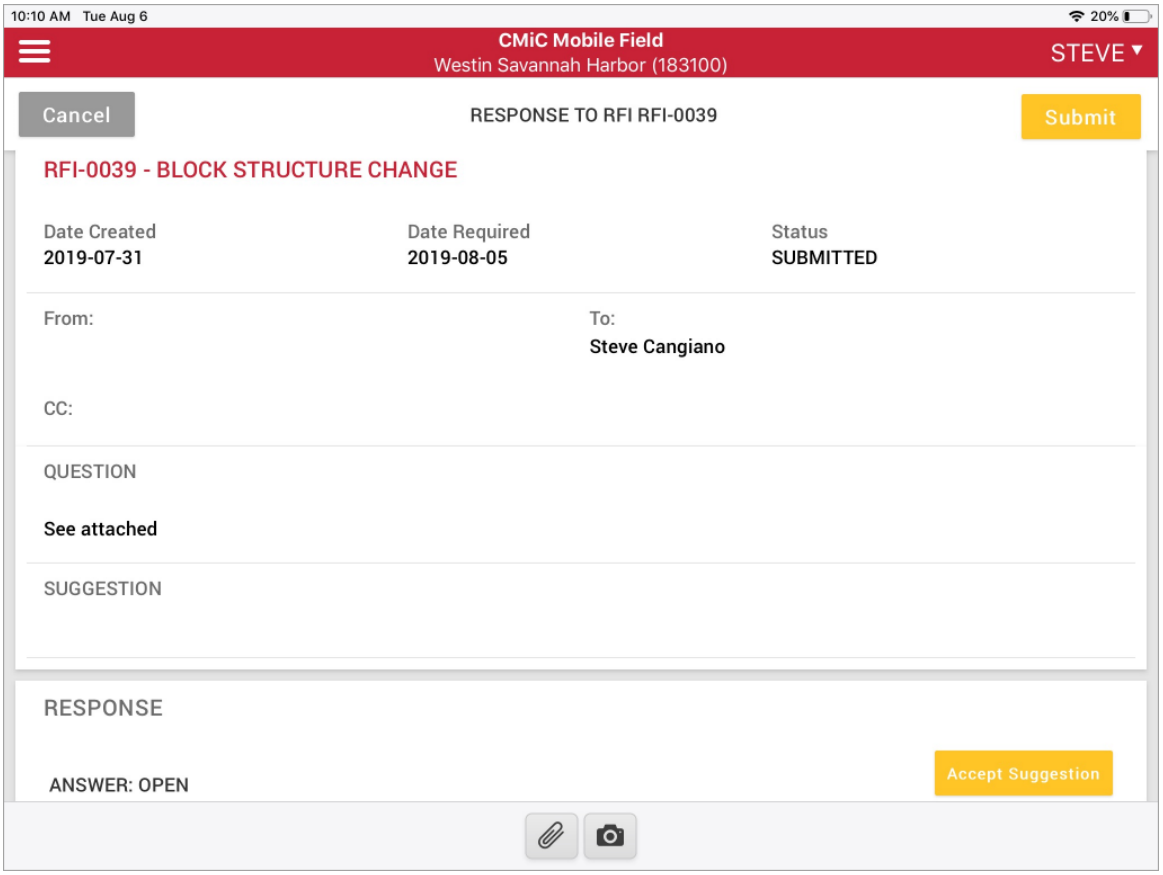
[**Submit**] will save the RFI to the RFI log type and update its status to submitted.

Add Note to RFI



To add a note, scroll to the bottom of the screen, add a note in the Add A Note textbox and tap the Post Note icon .

Respond to RFI



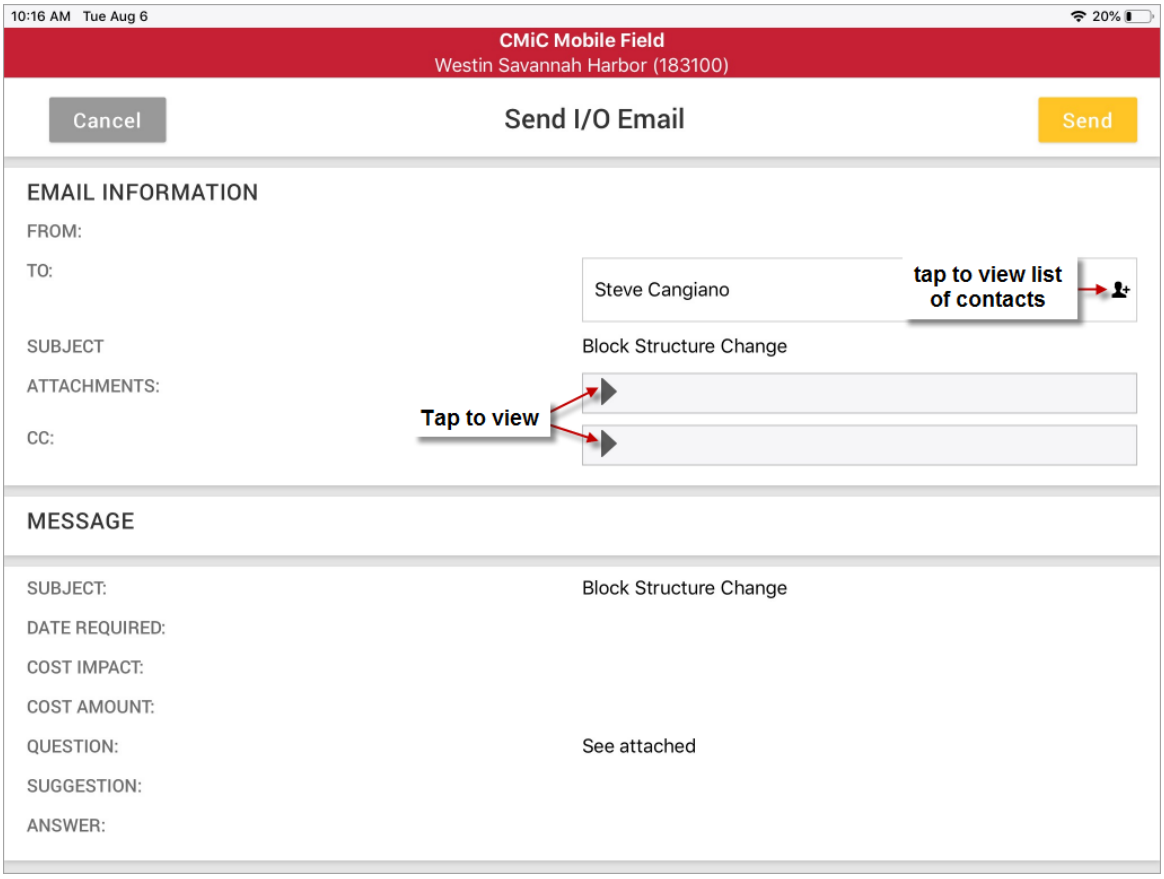
RFIs that require answering are displayed in the received group. To respond to an RFI, select “Received” from the Folder Choice drop-down list found under the Filter icon.

Next, select the RFI from the left pane, and under the right pane tap the Respond icon .

In the Response section, enter the answer and any related cost and schedule impacts. If a suggestion was entered, it can be accepted by tapping the [**Accept Suggestion**] button to copy the suggestion into the answer field, saving the user the effort of re-typing it.

Once complete, tap [**Submit**] to submit it into the Enterprise system and have it distributed.

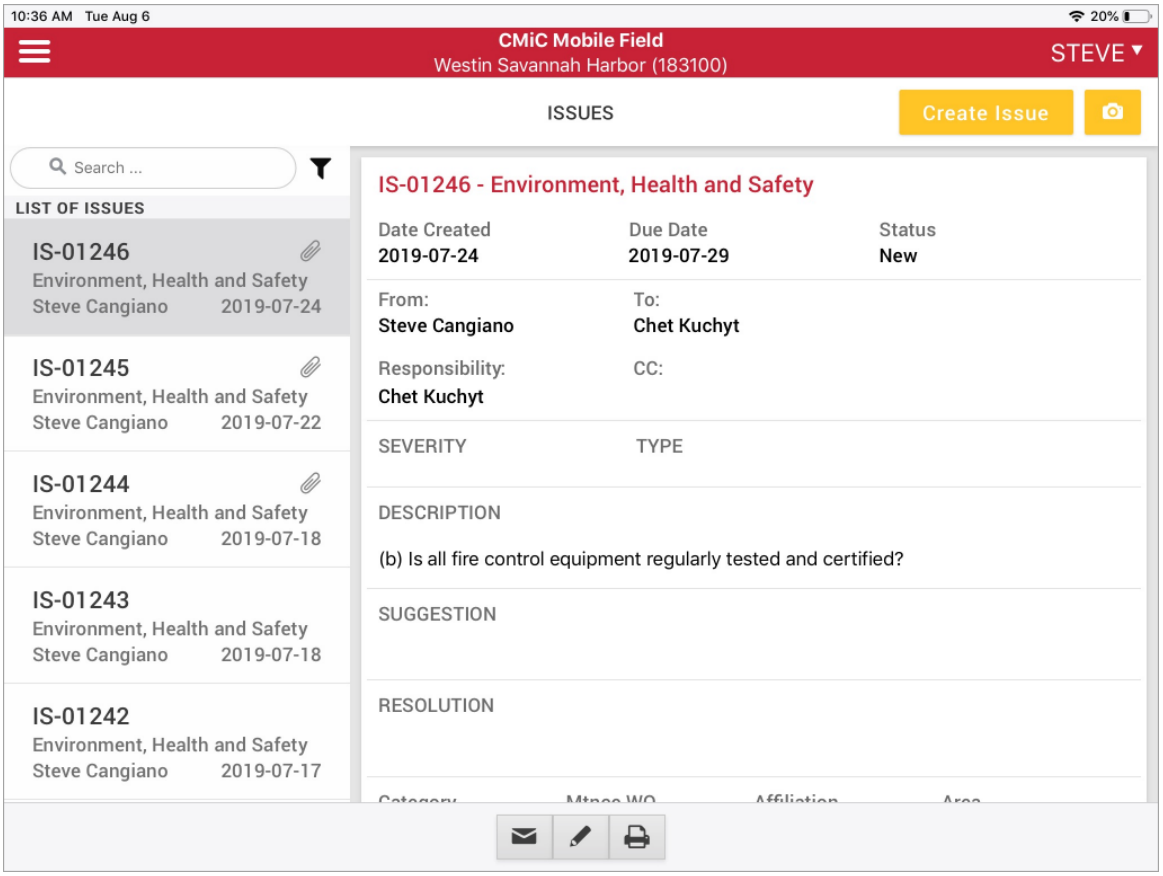
Send I/O Email for RFI



To send an I/O email for an RFI, tap the Email icon under the displayed RFI. As shown above, the Send I/O Email screen will be displayed.

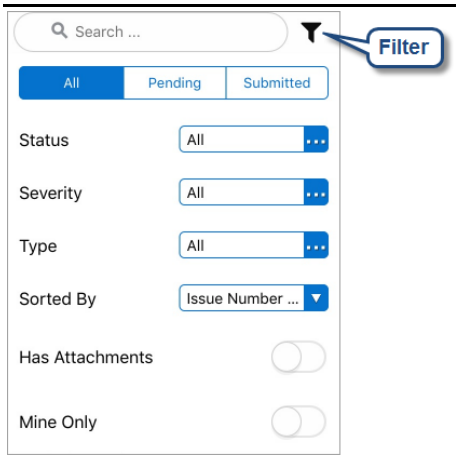
Enter and confirm the email's details (CCs, attachments, message, etc.) and tap [**Send**] to send it.

Issues – Screen



Tap the icon to display the Issues screen, which lists issues created on the mobile device and issues sent via the Enterprise system. As shown above, issues are listed in the left pane, and the selected issue is displayed in the right pane. To refresh the list of issues, swipe down on the list. Created or modified issues can be saved to the device until they are ready to be submitted into the system, and once submitted, they are distributed and available in CMiC Field.

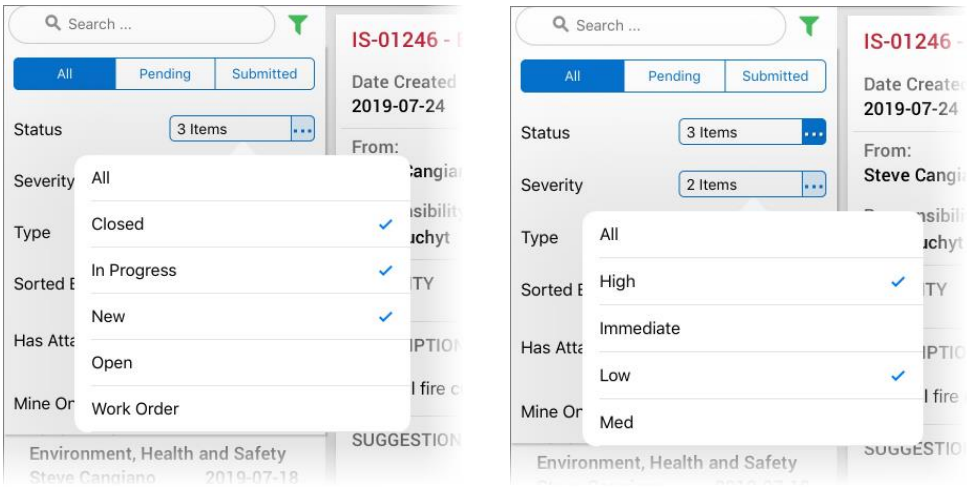
Search & Filter Issues



To search for an issue among those listed, tap the Search box, enter text to search against, and tap the device's Return keyboard key. All issues matching the search term will be displayed in the left pane of the screen. Use the ⊗ within the Search box to clear the search results and return to the full list of issues.

To filter the listed issues, tap the Filter icon to display the available filter parameters for issues, as shown above. Filtering can be done by combinations of status, severity, and type and by whether the issues have attachments. To only list issues with attachments, enable the Has Attachments toggle.

The Status, Severity, and Type filter fields have a multi-select LOV from which multiple items can be selected to filter against. A blue checkmark ✔ indicates which items are selected, as shown below:



The filtered results can be sorted by selecting a sort sequence via the Sorted By field. The default sort sequence is "Issue Number Descending".

When a filter parameter is in use (e.g. "All" is not selected from its LOV) or the Sorted By parameter is not set to its default ("Issue Number Descending"), the color of the Filter icon changes from black to green to indicate it is active.

NOTE: If the filter is in use, the Search field can be used to search the list of filtered issues.

Create Issue

To create an issue, tap the [**Create Issue**] button. Enter all required data, and if applicable, add attachments using the Attachments section near the bottom of the screen. Tap the Plus icon, then tap the Camera icon to add a photo using the device's camera, tap the Attachments icon to add a photo saved on the device, or tap the Folder icon to attach a document. When finished, tap [**Save**] to save the issue to the device, or [**Submit**] to submit it into the system and have it sent to selected personnel.

Add Photo to Issue

To add a photo to the issue using the device's camera, tap the yellow Camera icon on the top-right side of the screen.

To add a photo that is saved on the device, tap the Edit icon on the bottom of the screen, then tap the Attachments icon on the bottom of the screen.

Send I/O Email for Issue

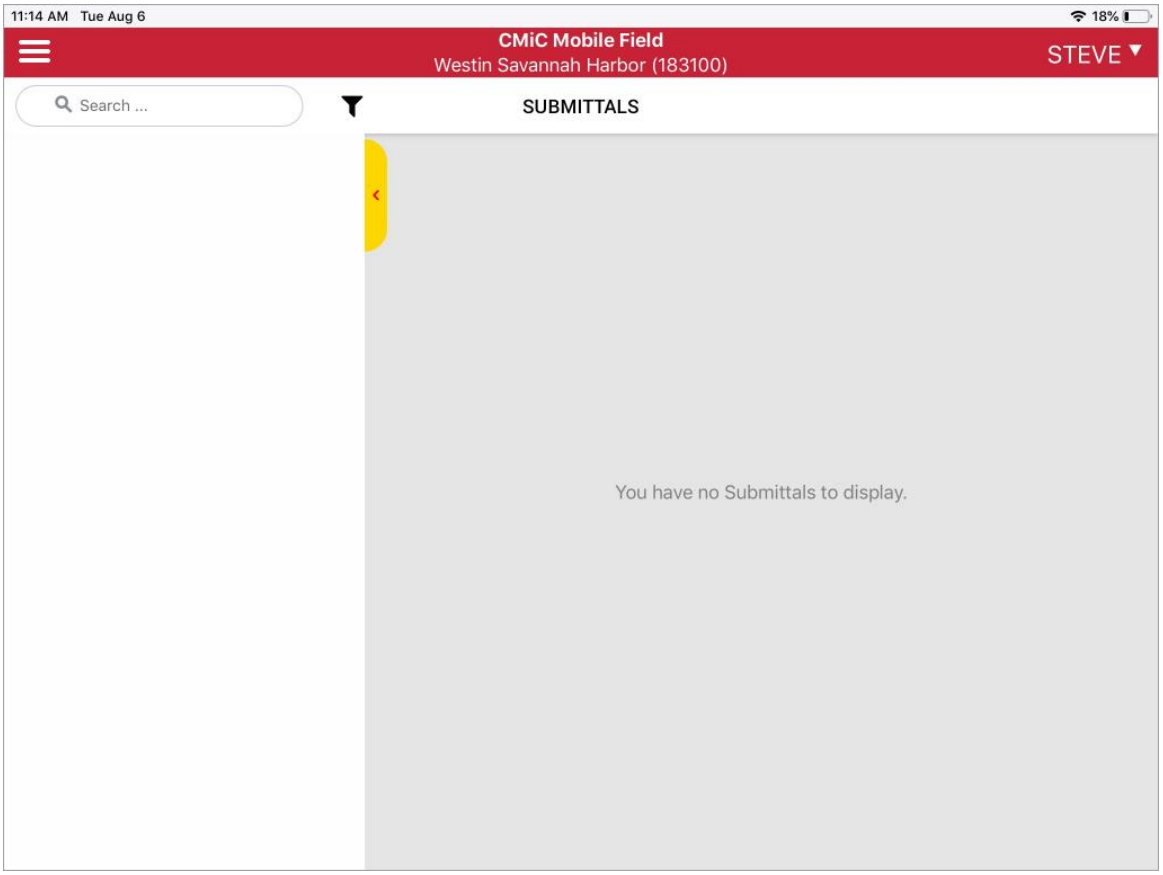
To send an I/O email for an issue, tap the Email icon at the bottom of the screen. Enter and confirm the email's details (CCs, attachments, message, etc.) and tap [**Send**] to send it.

Submittals – Screen

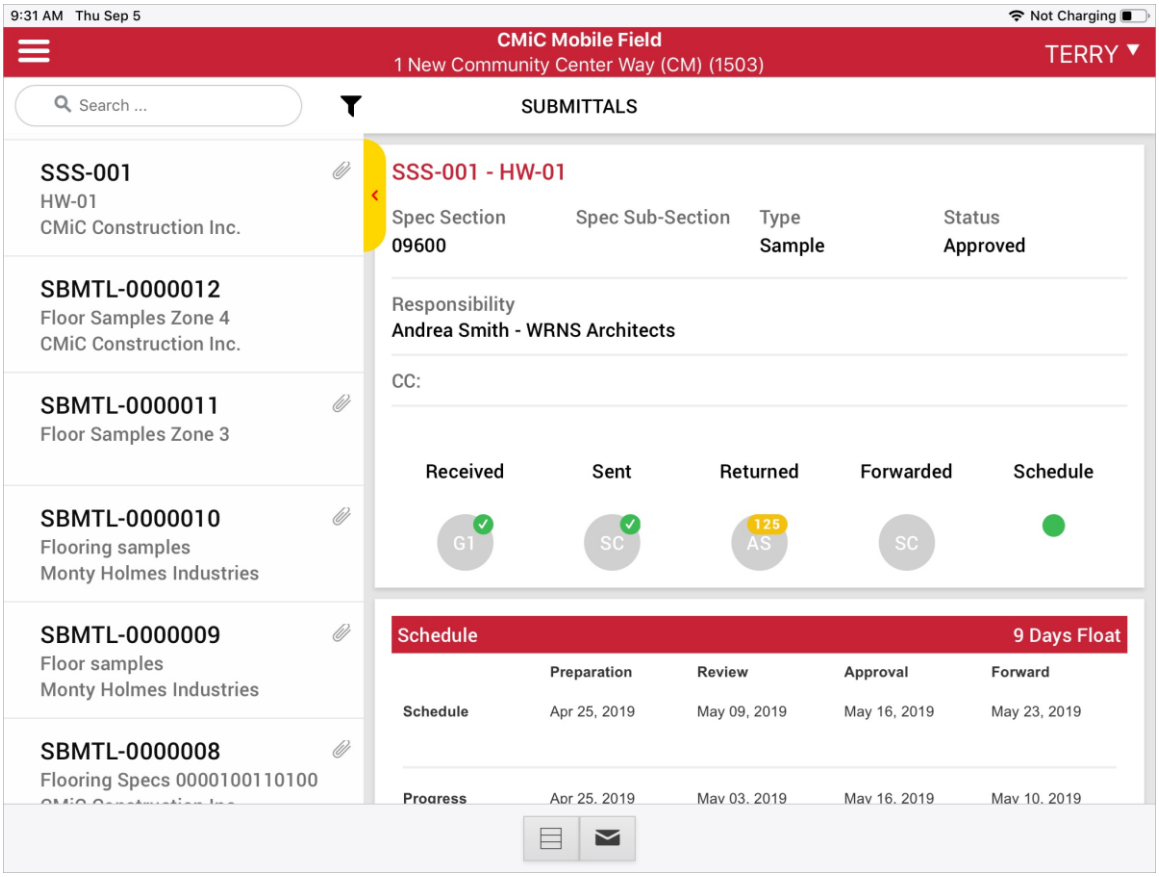
Submittals are accessed via the

icon. This screen was designed to quickly view the progress of submittals and their attachments, and to perform light collaboration tasks. The submittals available on this screen were created in the main CMiC Field module, and users only see submittals that they are a contact on.

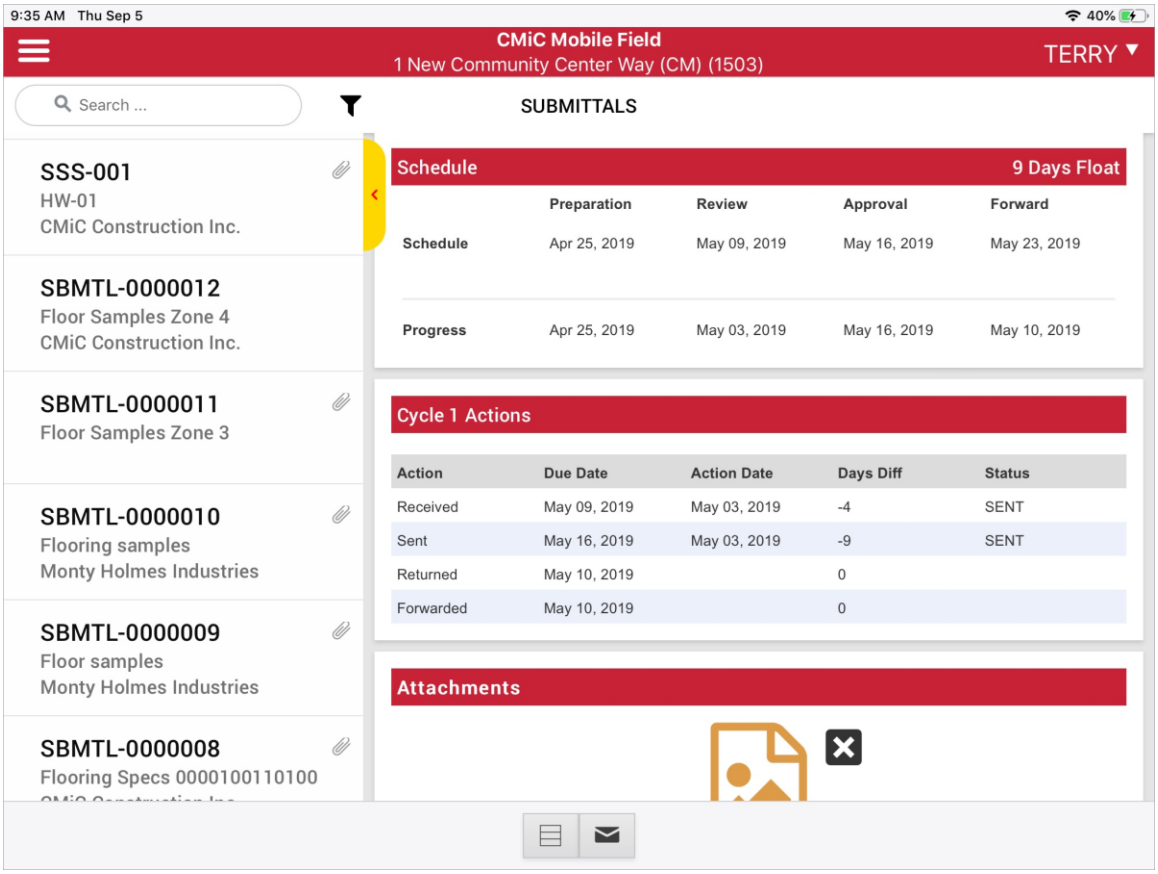
If no submittals are available for the user for the current project, the following screen is displayed:

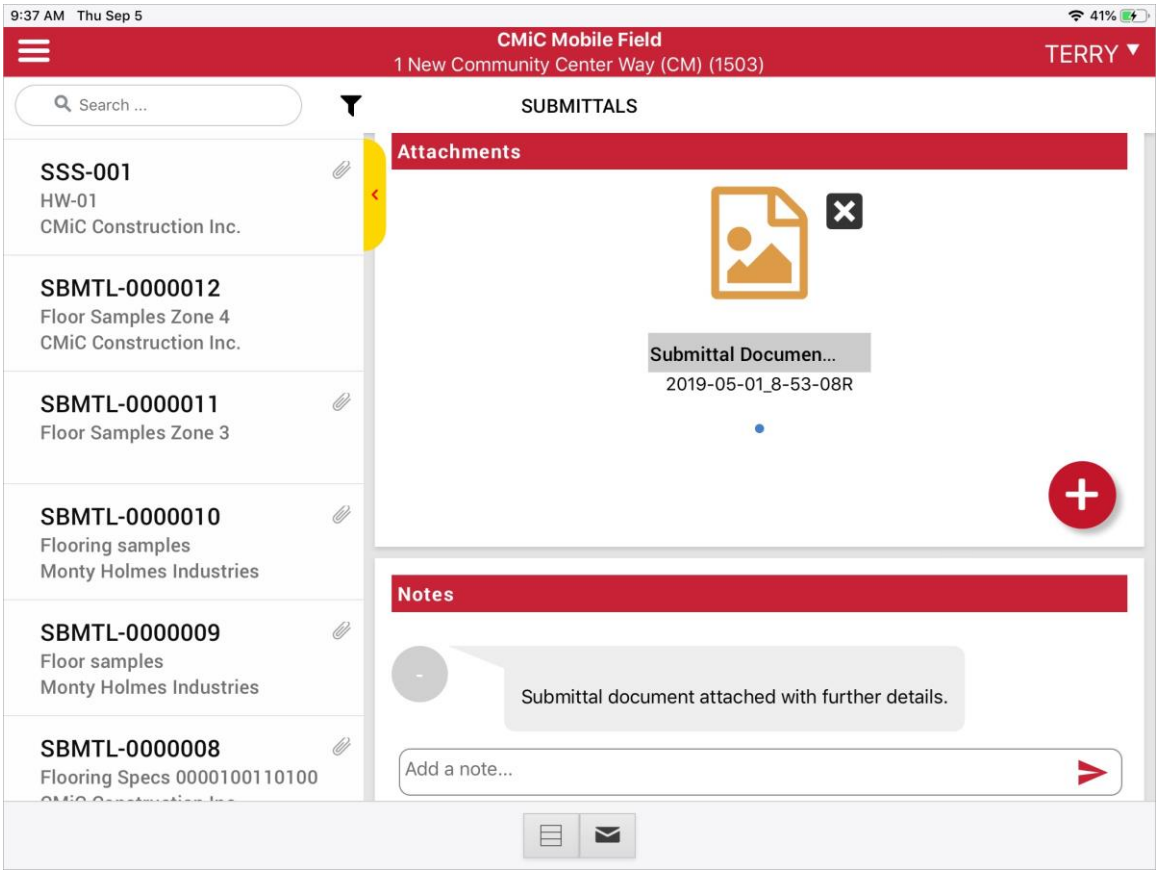


If submittals exist for the current project and user, the following screen is displayed, which lists the submittals along the left pane. For the selected submittal in the left pane, its details, review cycle status, attachments, and notes are available in the right pane.



The lower sections of the right pane, reached by scrolling, are shown below:

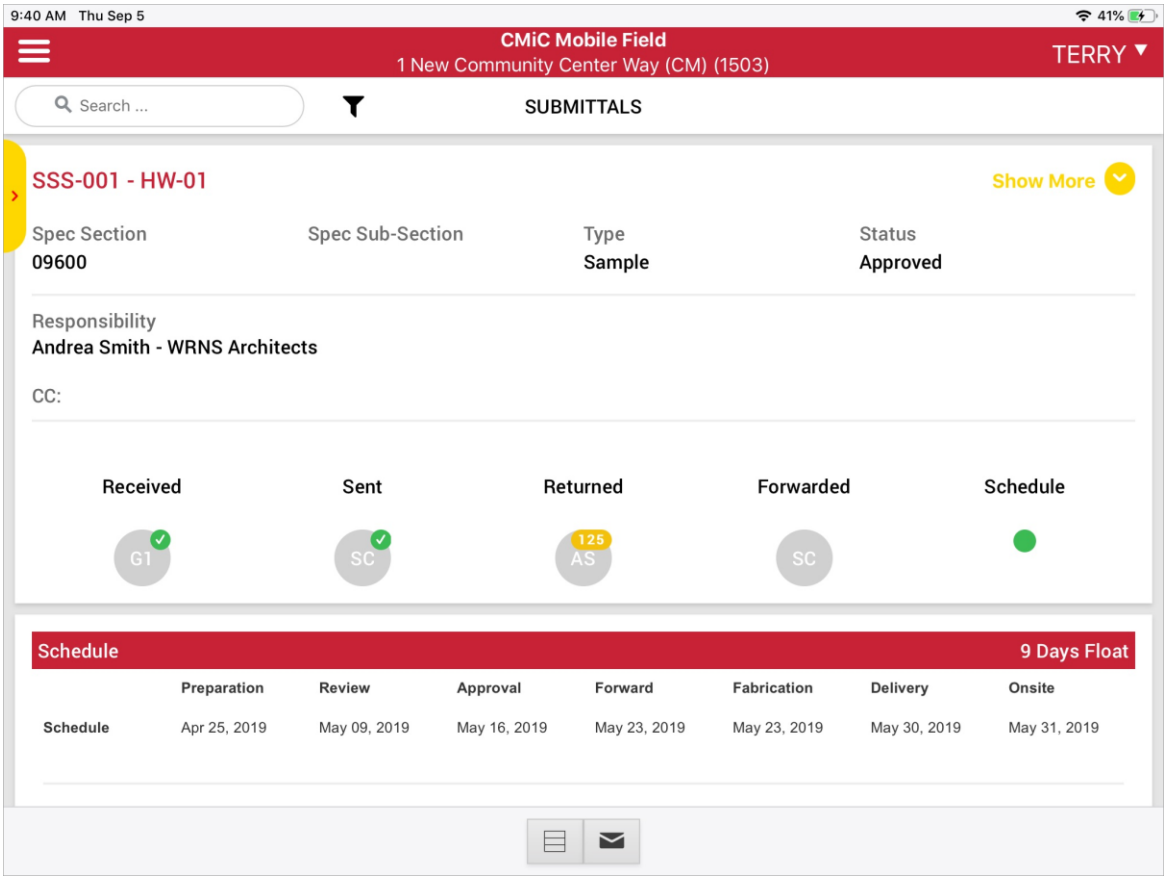

9:35 AM Thu Sep 5
40%
CMiC Mobile Field
1 New Community Center Way (CM) (1503)
TERRY
Search ...
SUBMITTALS
SSS-001
HW-01
CMiC Construction Inc.
SBMTL-0000012
Floor Samples Zone 4
CMiC Construction Inc.
SBMTL-0000011
Floor Samples Zone 3
SBMTL-0000010
Flooring samples
Monty Holmes Industries
SBMTL-0000009
Floor samples
Monty Holmes Industries
SBMTL-0000008
Flooring Specs 0000100110100
Schedule
9 Days Float
Preparation
Review
Approval
Forward
Schedule
Apr 25, 2019
May 09, 2019
May 16, 2019
May 23, 2019
Progress
Apr 25, 2019
May 03, 2019
May 16, 2019
May 10, 2019
Cycle 1 Actions
Action
Due Date
Action Date
Days Diff
Status
Received
May 09, 2019
May 03, 2019
-4
SENT
Sent
May 16, 2019
May 03, 2019
-9
SENT
Returned
May 10, 2019
0
Forwarded
May 10, 2019
0
Attachments



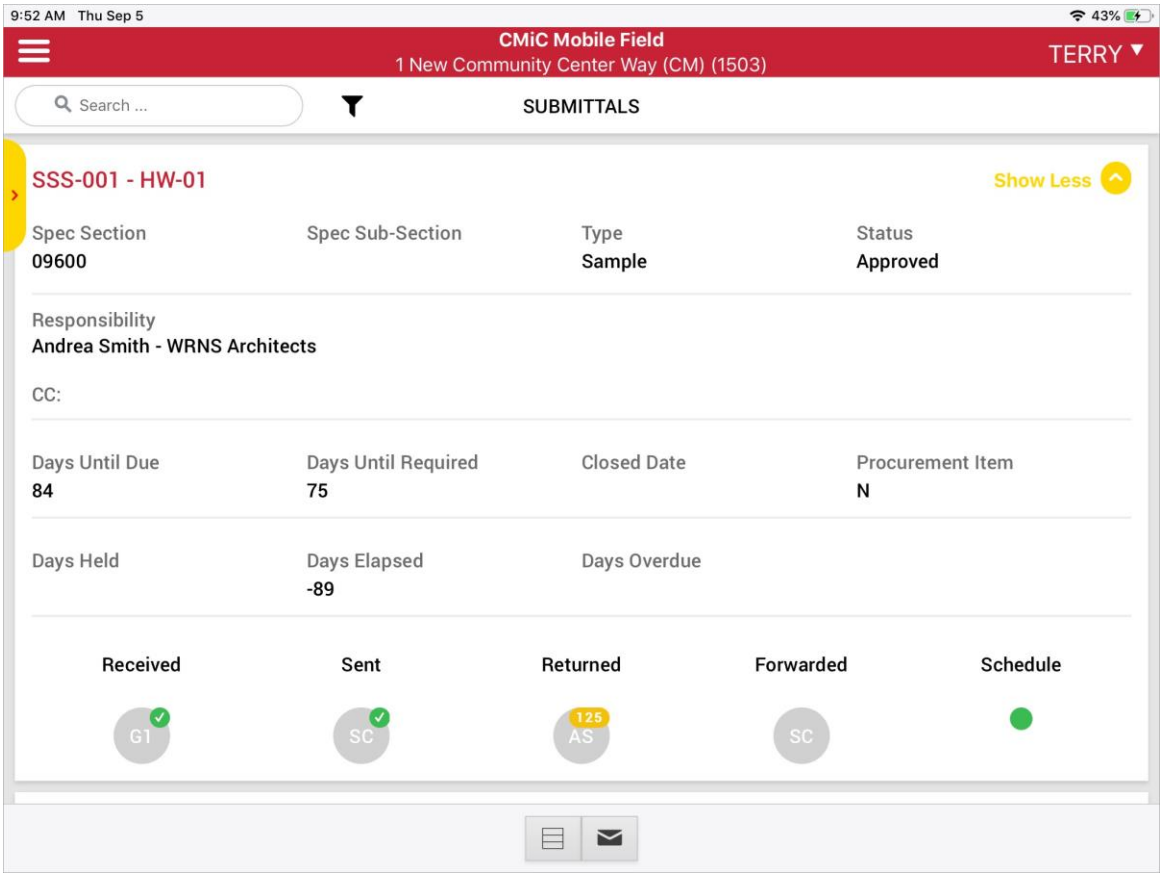
Notes, attachments, and photos can be added to the submittal by tapping their respective icons. The Email icon can be used to send an I/O to other contacts in the submittal review cycle.

Hide/Display List Pane & Show More/Show Less Details

Tap the control to hide or display the Submittal List pane. Some fields in the lower sections are hidden due to screen size when the Submittal List pane is shown, e.g. Fabrication, Delivery, and Onsite.



Tap the Show More control to display additional fields in the submittal header:



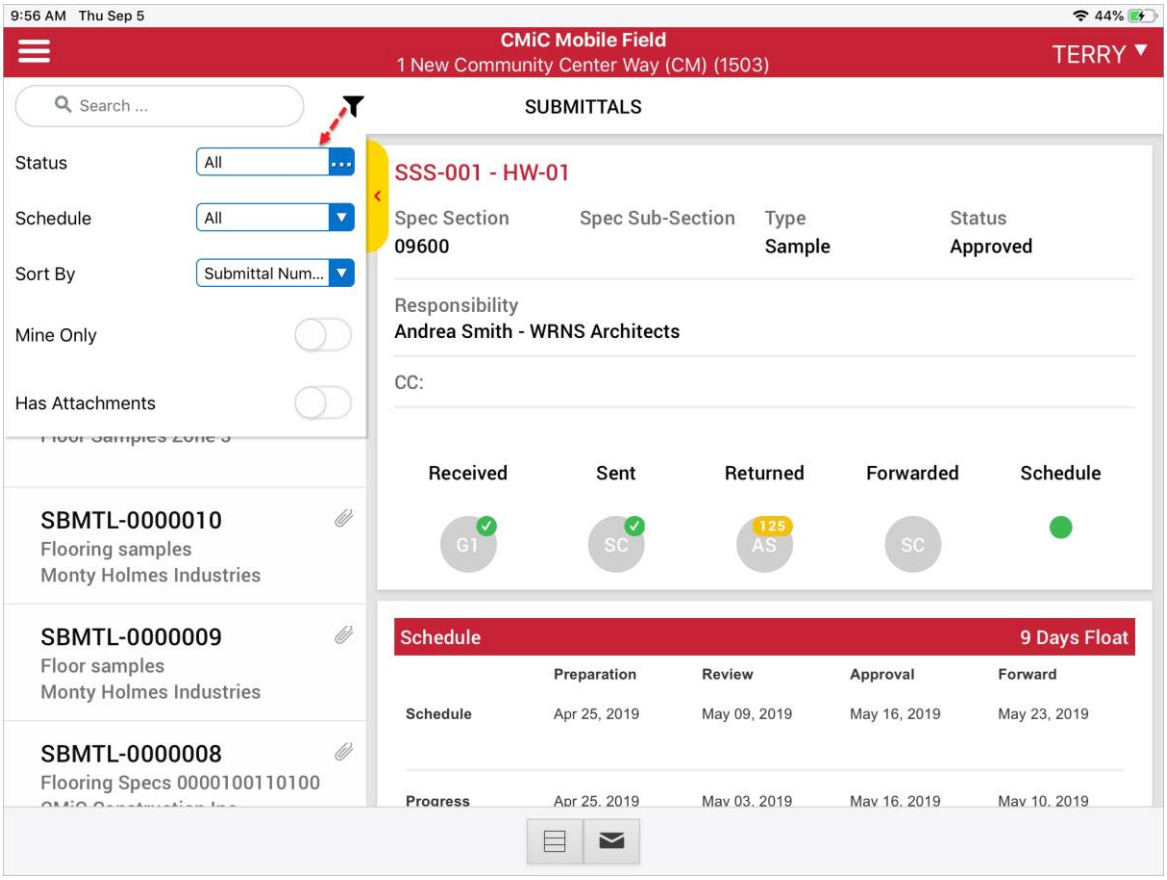
Tapping Show Less will collapse the additional header fields.

Search & Filter Submittals

To search for specific submittals, enter a search term in the Search box at the top of the screen and tap the device's Return keyboard key. All submittals matching the search term will be displayed in the left pane of the screen.

Use the within the Search field to clear the search results and return to the full list of submittals.

To filter the listed submittals, tap the Filter icon to display the available filter parameters for submittals, as shown below:



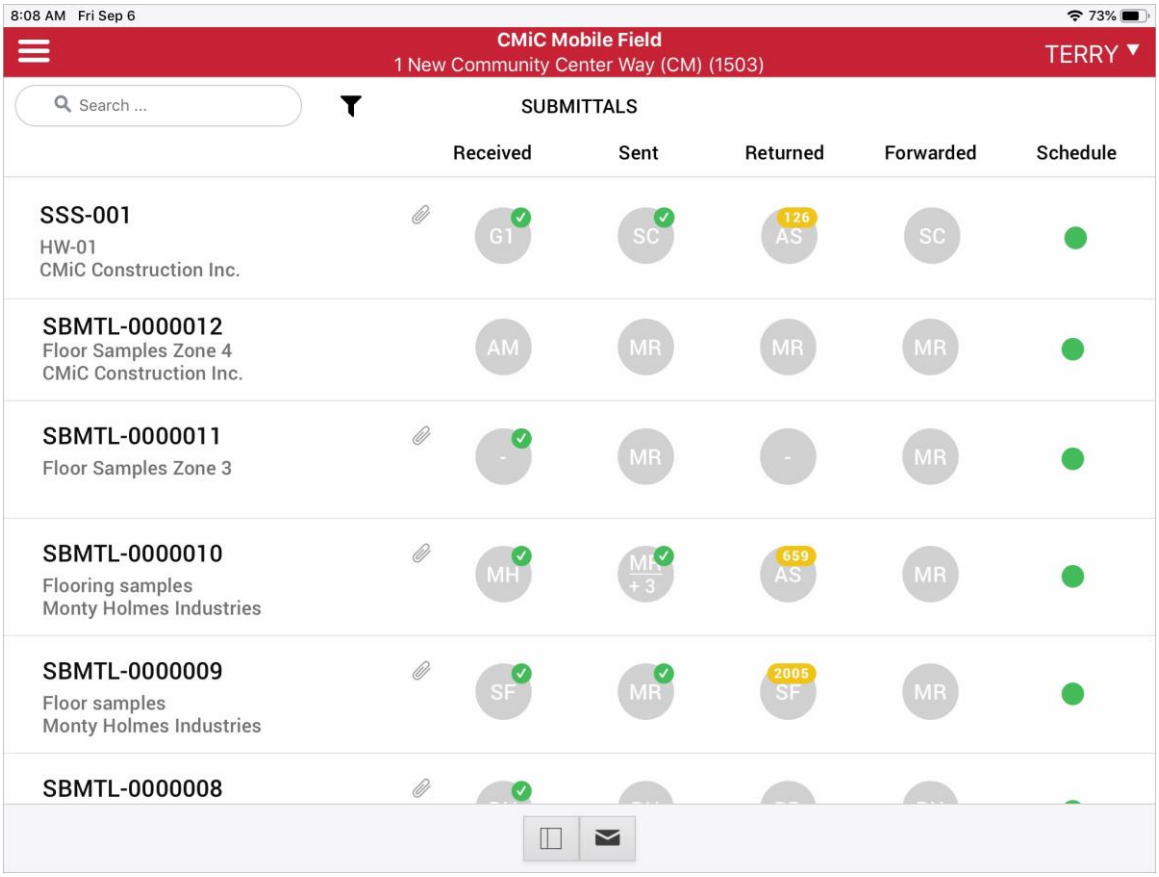
Filtering can be done by combinations of status, schedule, whether the submittal is the user's responsibility or not, and whether the submittal has attachments. To only list submittals the user is responsible for, enable the Mine Only toggle. To only list submittals with attachments, enable the Has Attachments toggle.

The filtered results can be sorted by selecting a sort sequence via the Sorted By field. The default sort sequence is "Submittal Number Descending".

When a filter parameter is in use (e.g. "All" is not selected from its LOV) or the Sorted By field is not set to its default ("Submittal Number Descending"), the color of the Filter icon changes from black to green to indicate it is active.

NOTE: If the filter is in use, the Search field can be used to search the list of filtered submittals.

Log Mode – Overview of Submittals' Review Cycles



Use the icon to switch the screen to log mode (shown above), and the icon to switch it back to split log mode.

In log mode, the screen displays an overview of the submittals' review cycle status.

The contact bubbles contain the contacts' initials, e.g. BC = Brian Capstan, and a checkmark beside a contact bubble indicates that the action has been completed. The number in a colored circle at the top right of a contact bubble indicates how many days overdue from the current date the submittal is. If there are multiple reviewers for a submittal, the contact bubble will show a "+" with the number of additional reviewers.

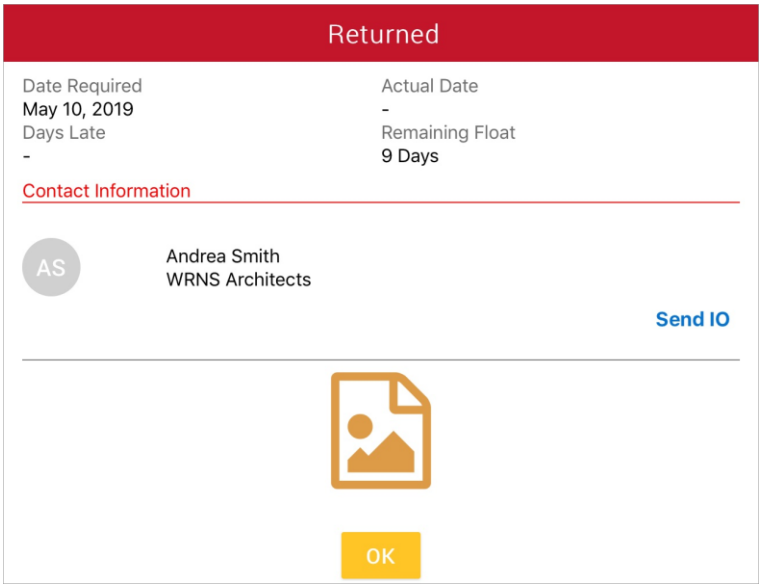
Schedule Color Legend

On schedule (positive float)

Delayed (0 float)

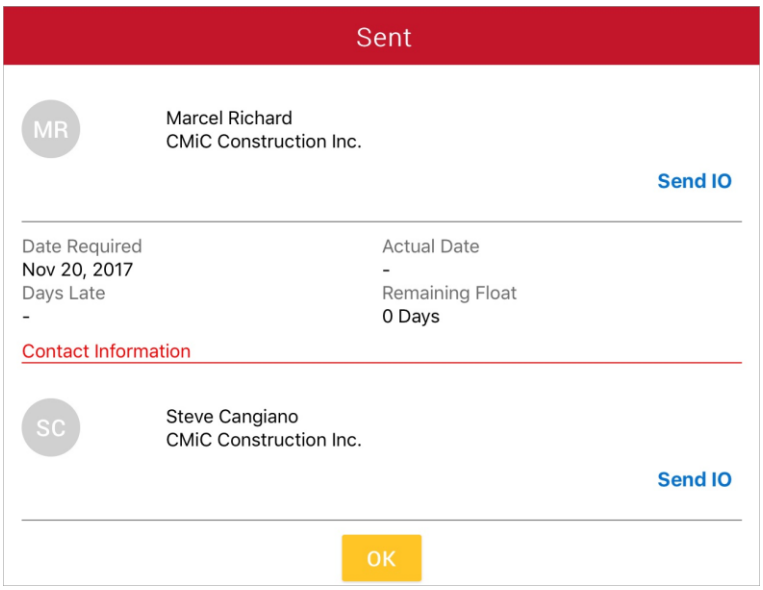
Late (negative float)

Contact Bubble Pop-Up Window

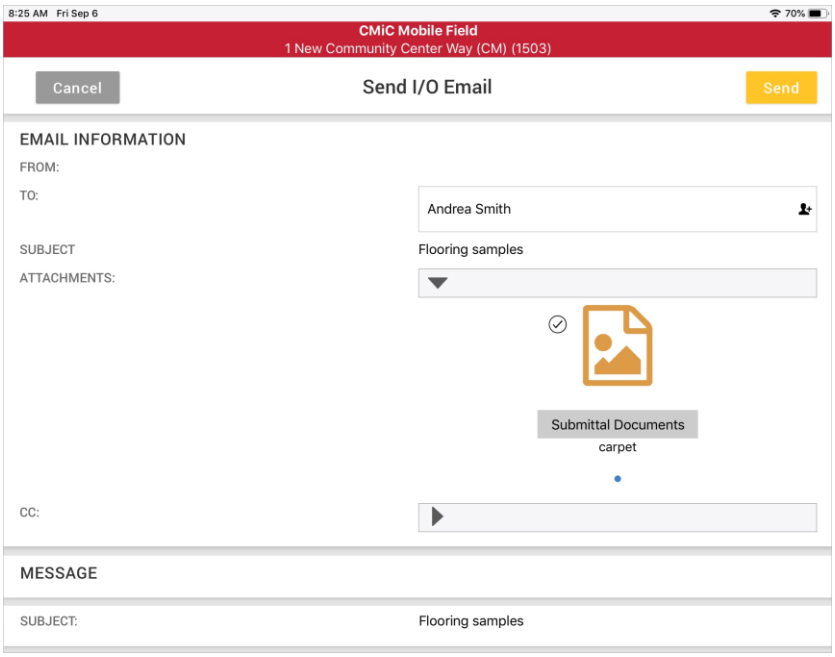


Tapping on a contact bubble brings up a pop-up window with further details. Any notes and attachments that were added by the contact via I/O are shown here.

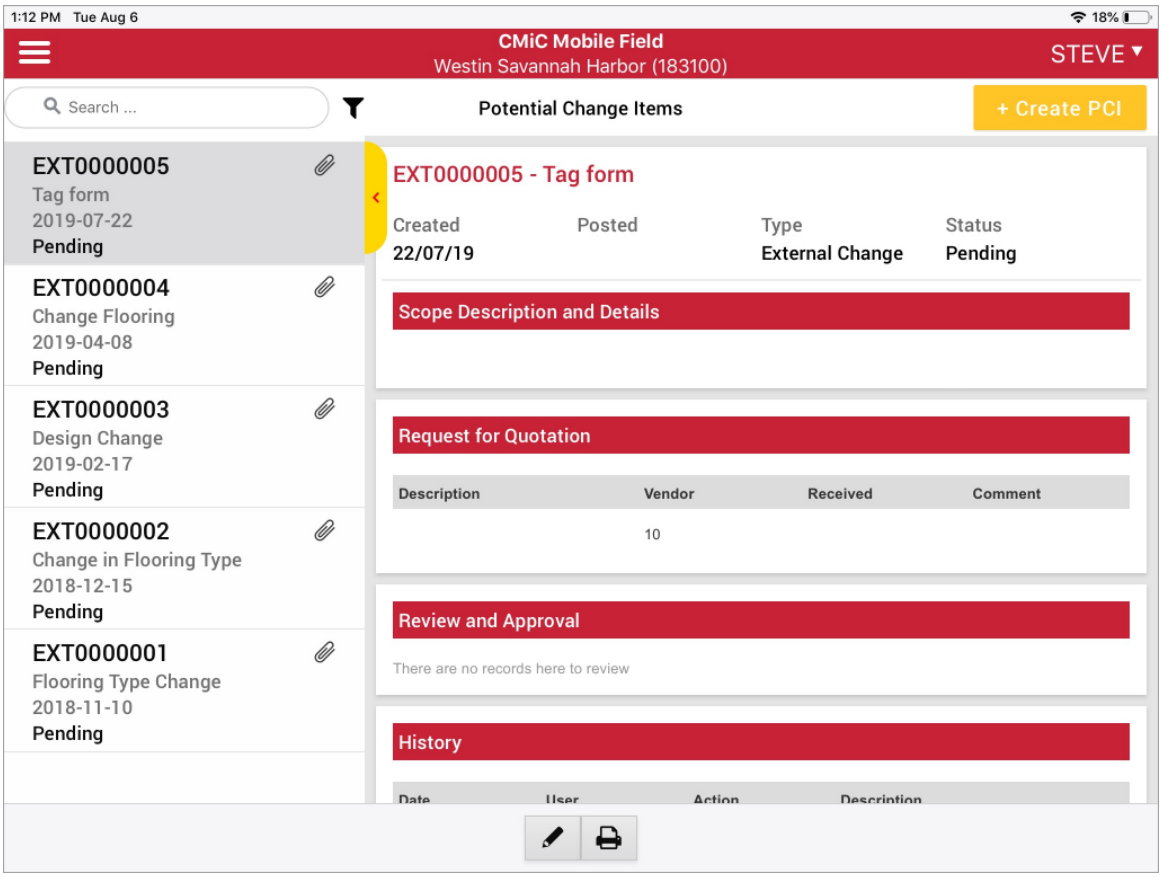
When there are multiple reviewers, the pop-up window displays details for each. Users can swipe up or down to scroll through the information:



From this pop-up window, an I/O can be sent to the other contacts in the submittal cycle:



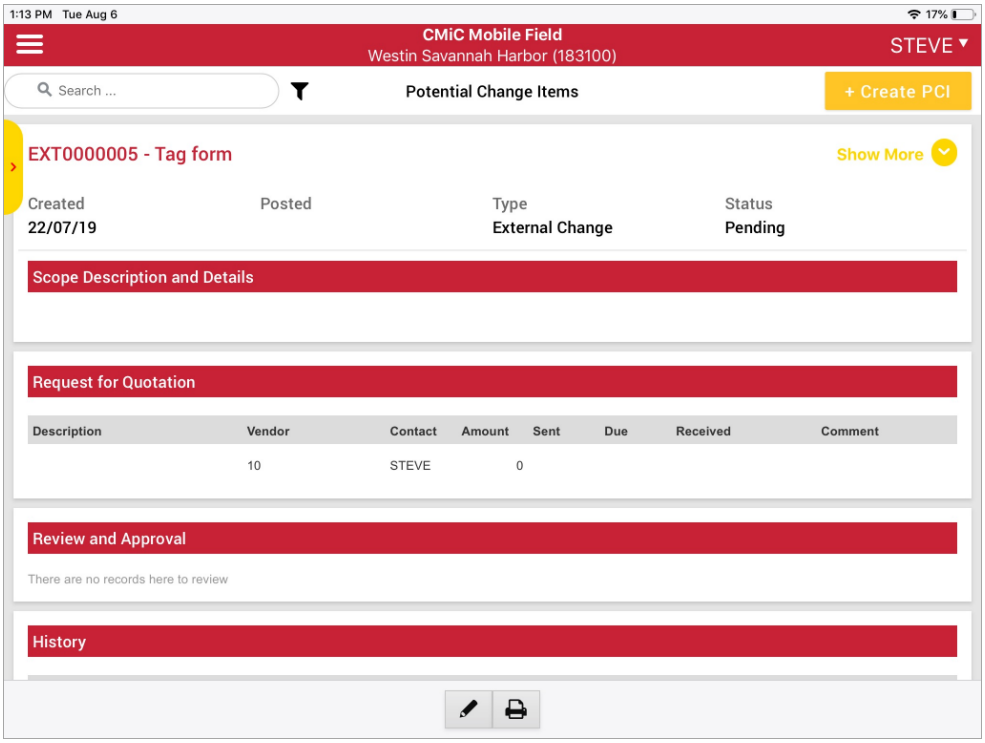
PCI – Screen



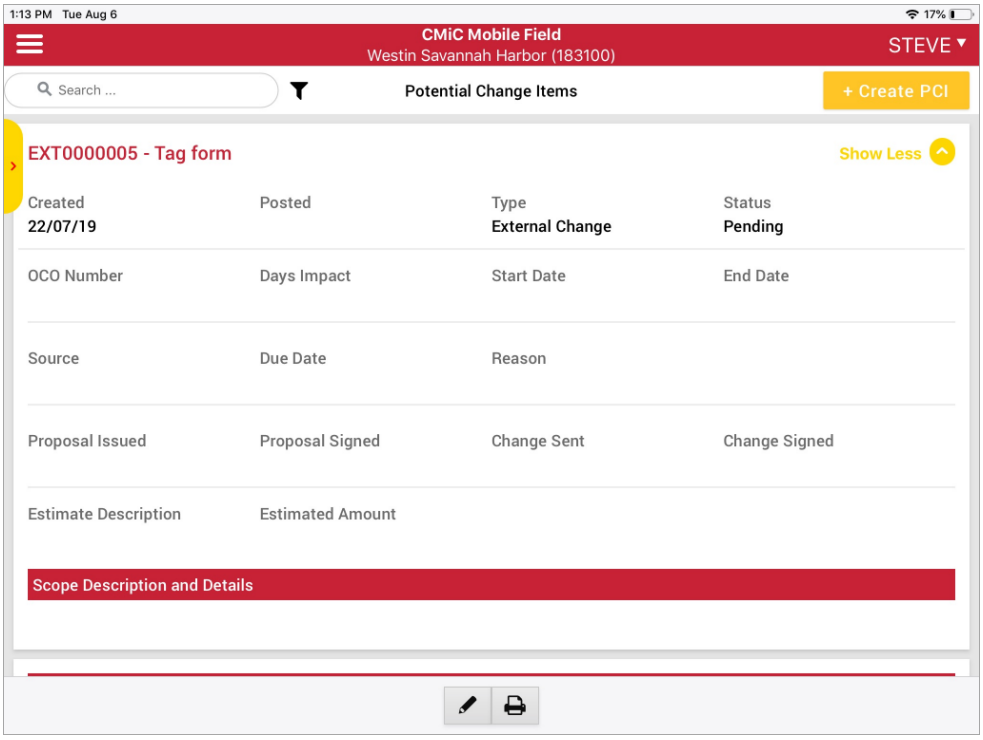
The PCI screen is accessed via the icon.

Hide/Display List Pane & Show More/Show Less Details

Tap the control to show or hide the List pane:



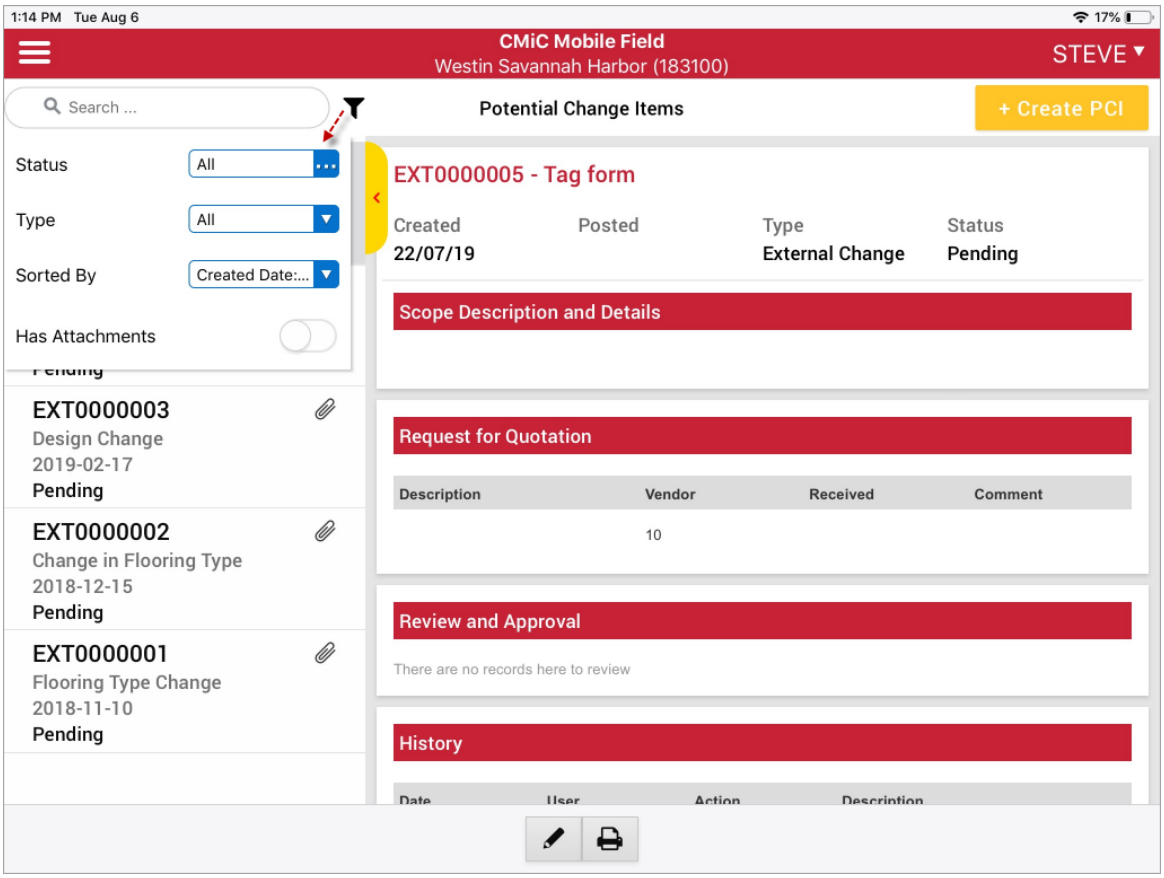
Tap the Show More control to show additional fields:



Search & Filter PCIs

To search for specific PCIs, enter a search term in the Search field at the top of the screen and tap the device's Return keyboard key. All PCIs matching the search term will be displayed in the left pane of the screen. Use the ⊗ within the Search field to clear the search results and return to the full list of PCIs.

To filter the listed PCIs, tap the Filter icon to display the available filter parameters for PCIs, as shown below:



Filtering can be done by combinations of status, type, and by whether the PCIs have attachments or not. To only list PCIs with attachments, enable the Has Attachments toggle.

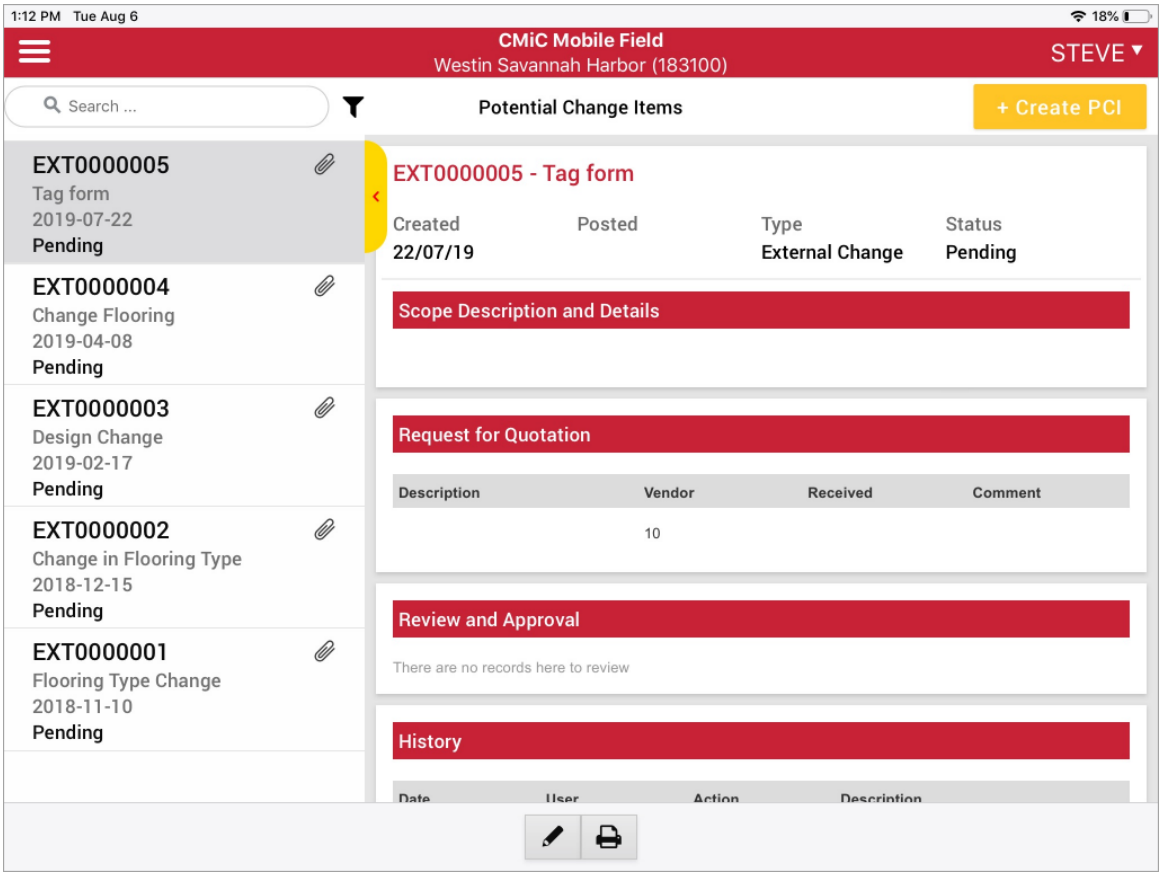
The filtered results can be sorted by selecting a sort sequence via the Sorted By parameter. The default sort sequence is "Created Date: New to Old".

When a filter parameter is in use (e.g., "All" is not selected from its LOV) or the Sorted By parameter is not set to its default ("Created Date: New to Old"), the color of the Filter icon changes from black to green to indicate it is active.

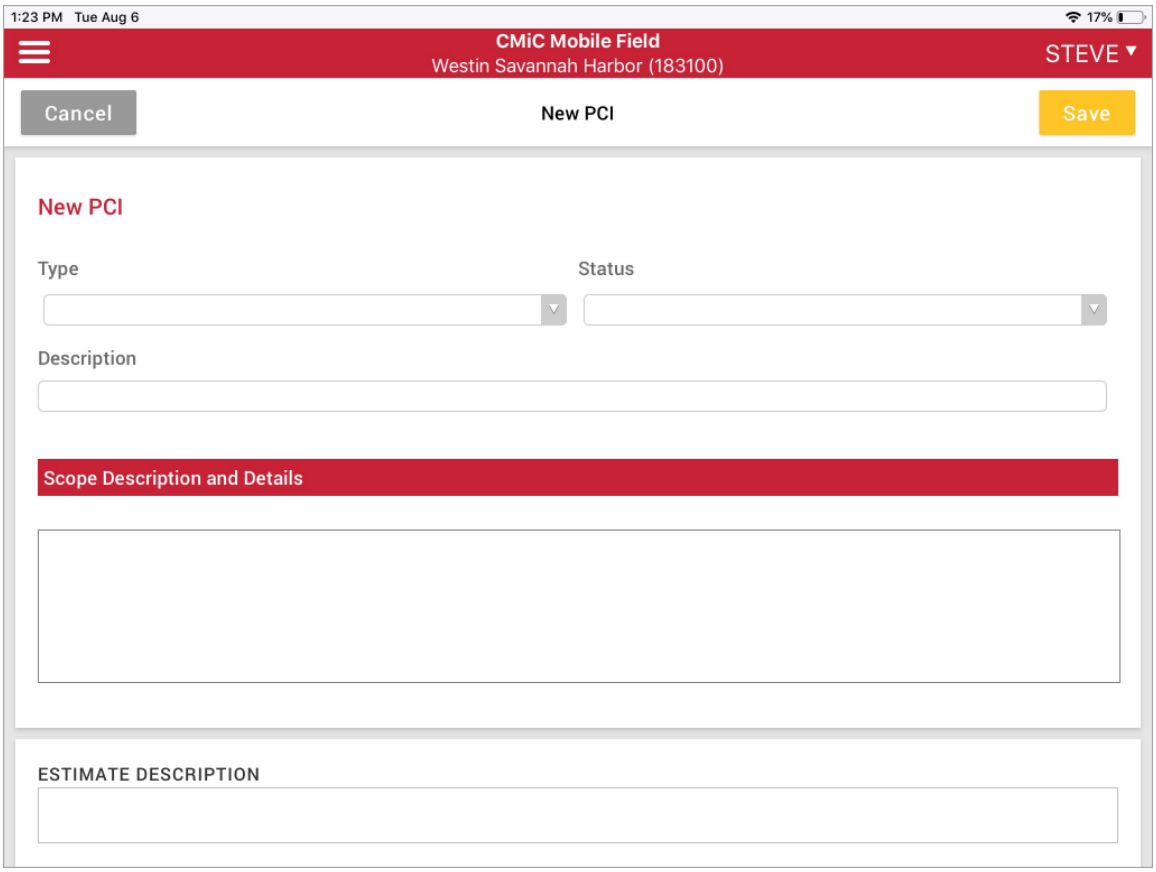
NOTE: If the filter is in use, the Search field can be used to search the list of filtered PCIs.

Create PCI

To create a PCI, tap the yellow [**+Create PCI**] button:



An entry screen will be displayed:

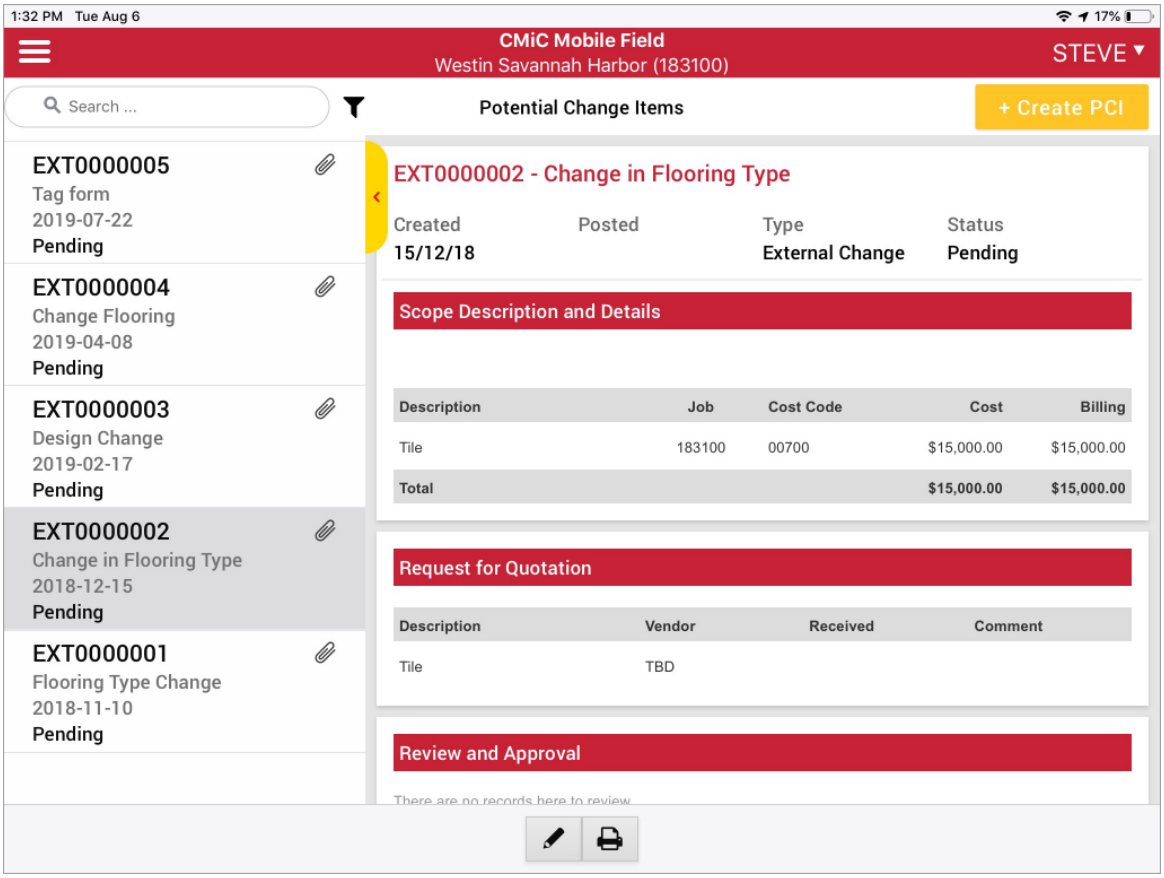


Enter the description and select the PCI type and status. A detailed scope description and details can be entered.

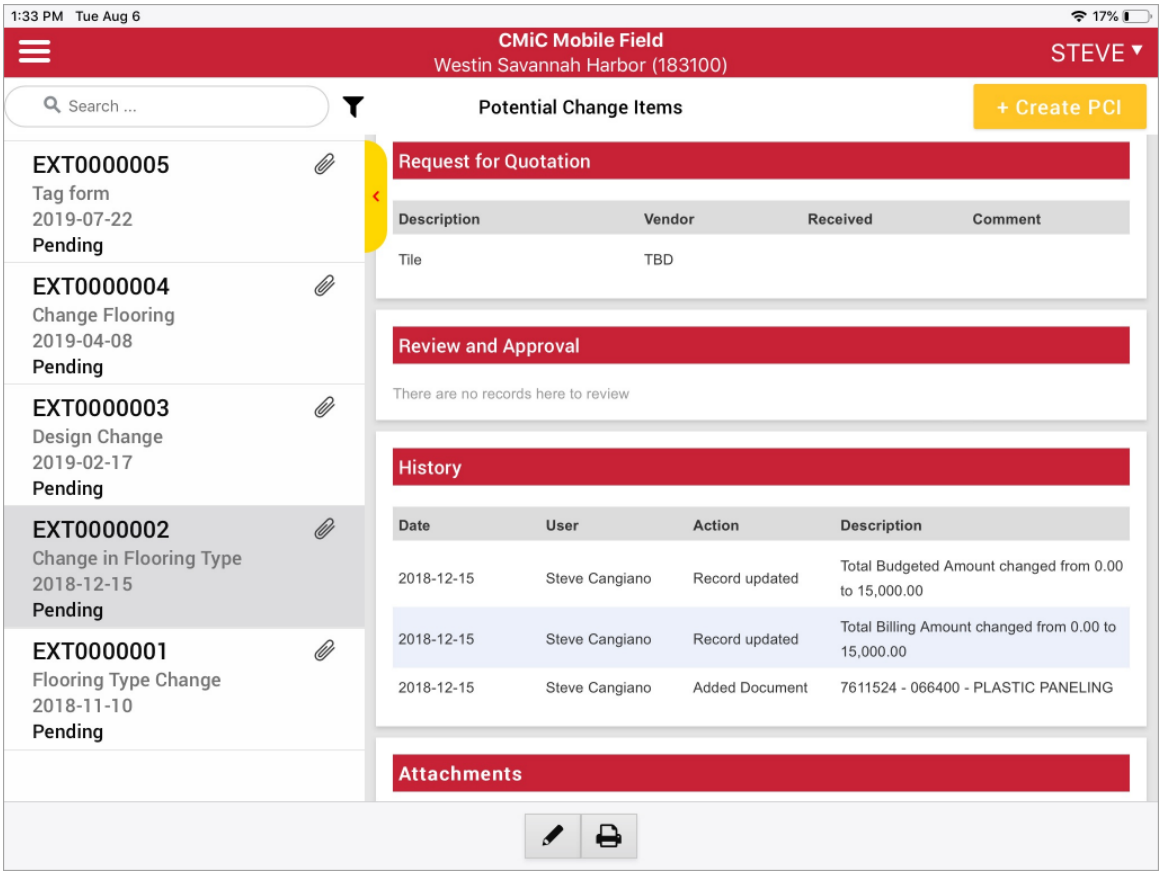
Add any attachments by using the Attachments icon to select an existing image, or the Camera icon to capture an image to attach. Tap [**Save**] to save the PCI.

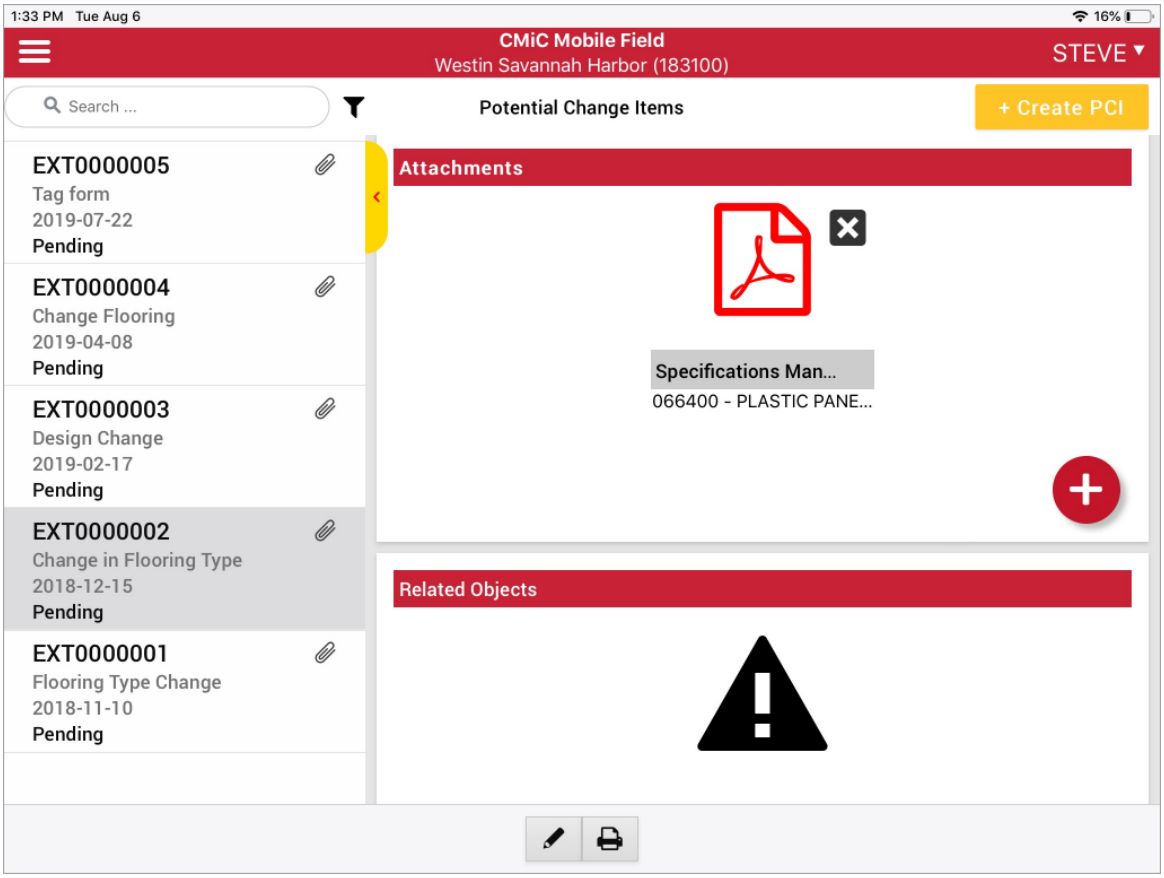
The current delivery of the PCI is limited to only a few header fields. As development progresses, more fields will be included.

The PCI details are added via the CMiC Field module and will include any markups, request for quotations, workflow activity, the top five history lines, attachments, related objects, and notes.


1:32 PM Tue Aug 6
17%
CMiC Mobile Field
Westin Savannah Harbor (183100)
STEVE
Search ...
Potential Change Items
+ Create PCI
EXT0000005
Tag form
2019-07-22
Pending
EXT0000004
Change Flooring
2019-04-08
Pending
EXT0000003
Design Change
2019-02-17
Pending
EXT0000002
Change in Flooring Type
2018-12-15
Pending
EXT0000001
Flooring Type Change
2018-11-10
Pending
EXT0000002 - Change in Flooring Type
Created
15/12/18
Posted
Type
External Change
Status
Pending
Scope Description and Details
Description
Job
Cost Code
Cost
Billing
Tile
183100
00700
$15,000.00
$15,000.00
Total
$15,000.00
$15,000.00
Request for Quotation
Description
Vendor
Received
Comment
Tile
TBD
Review and Approval
There are no records here to review

The following screens show the Detail sections:



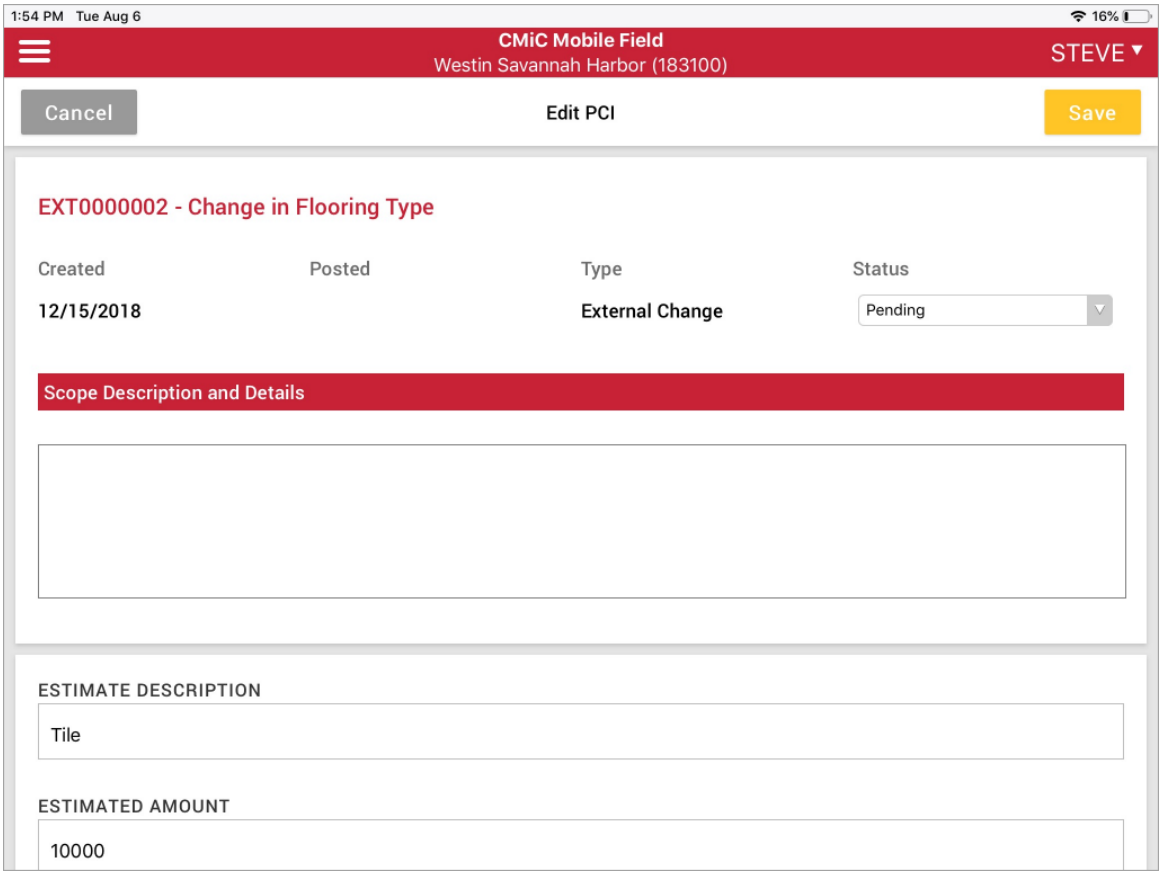


The attachments and related objects are taken from the Attachments tab and the Related Objects tab.

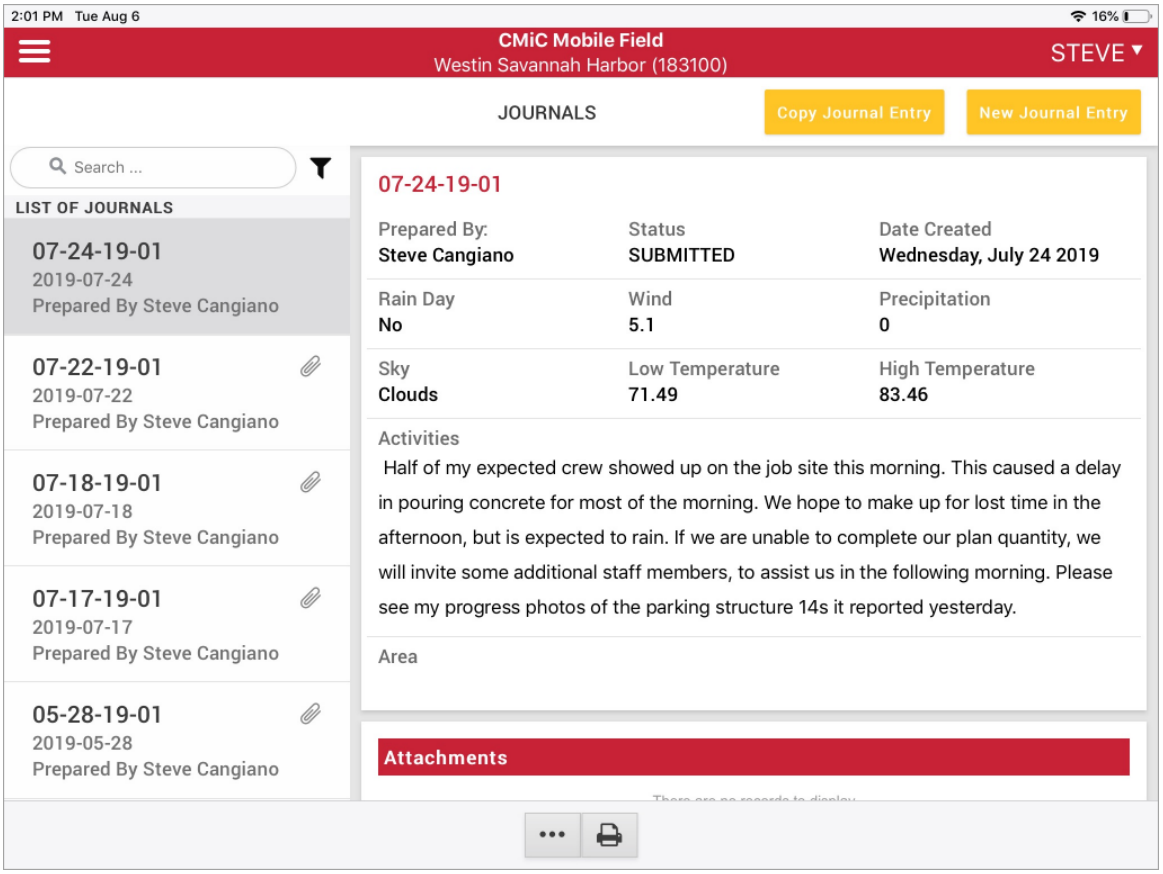
An icon will be displayed for each related object. Tapping on the icon will display the details of that object.

Edit PCI

On the mobile device, only the fields that are available during PCI creation are available for editing, namely Status, Scope Description and Details, Attachments, and Related Objects.


1:54 PM Tue Aug 6
16%
CMiC Mobile Field
Westin Savannah Harbor (183100)
STEVE
Cancel
Edit PCI
Save
EXT0000002 - Change in Flooring Type
Created
Posted
Type
Status
12/15/2018
External Change
Pending
Scope Description and Details
ESTIMATE DESCRIPTION
Tile
ESTIMATED AMOUNT
10000

Journal – Screen



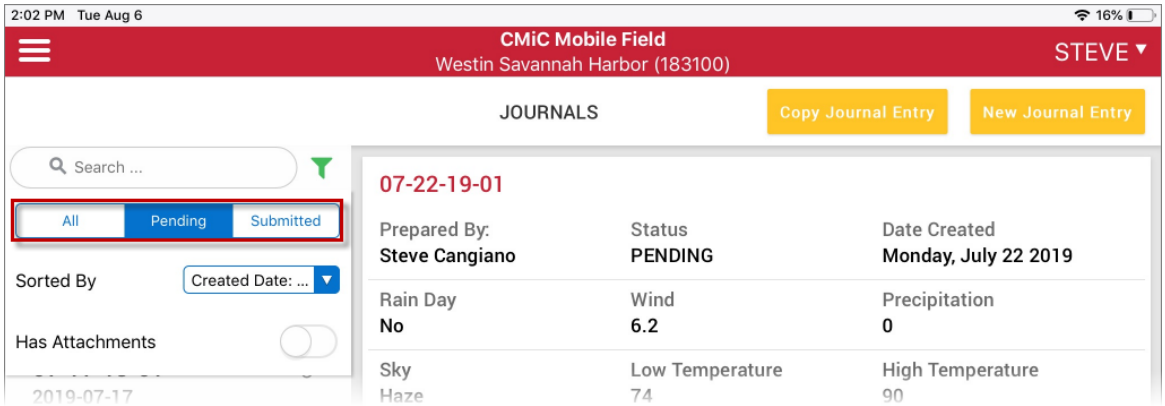
Tap the Journal icon to launch the Journal screen, which is the mobile version of the Daily Report screen in CMiC Field (under the Site Management menu). It is used to create and detail journal records on-site, and to submit them into the Enterprise system when completed.

This screen lists journals in the left pane, for the selected type (pending or submitted), and it displays the selected journal in the right pane. In the right pane, the General tab is displayed, and the other tabs can be viewed by tapping the Edit icon (found on the bottom of the screen).

To prevent clutter and long loading times, this screen only lists journals within a 30 day date range.

For details about daily journals, please refer to the *Daily Journal* section of the *CMiC Field* reference guide.

Unsubmitted Journals

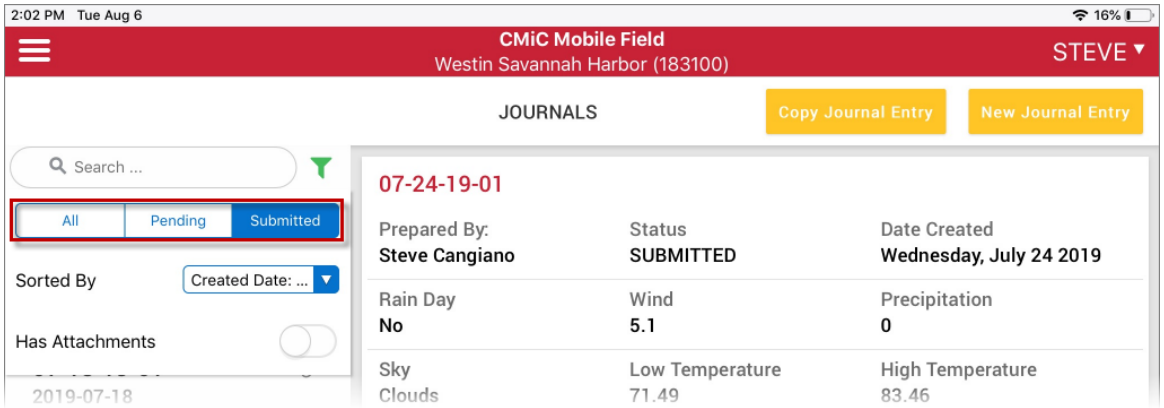


To view the list of unsubmitted journals, select “Pending” from the Filter icon drop-down menu, framed above.

To view or edit the details of an unsubmitted journal, select it from the left pane, then tap the Edit icon below the displayed entry.

To submit an unsubmitted journal, select it from the left pane and tap the Edit icon. Then, tap the yellow [**Submit**] button.

Submitted Journals



To view the list of submitted journals, select “Submitted” from the Filter icon’s drop-down menu, framed above. All journals within a 30 day date range will appear on this list. Once a journal is submitted, it can no longer be edited, but it can be viewed by selecting it and tapping the ••• icon at the bottom of the screen.

Screen’s Main Controls

: Journal Type Selection (All/Pending/Submitted)

Used to select the type of journals to display. When Submitted is selected, the [**Copy Journal Entry**] button becomes available.

: Search/Filter Listed Journals

Used to filter the journals in the left pane according to the entered search text.

New Journal Entry **: Create Journal Entry**

Used to create a new journal entry. For details about each tab, please refer to the subsequent sections about them, and if necessary, to the *Daily Journal* section of the *CMiC Field* reference guide.

Copy Journal Entry **: Copy Selected Journal to New Journal** (Submitted Journals Only)

NOTE: This button is only available when "Submitted" is selected in the Filter icon's drop-down menu.

Used to create a new journal based on a submitted journal. To do so, select a submitted journal, in the left pane, and tap this button. The selected journal's details are copied to a new journal entry, and the Create New Journal screen is launched to modify it as necessary, and to save or submit it.

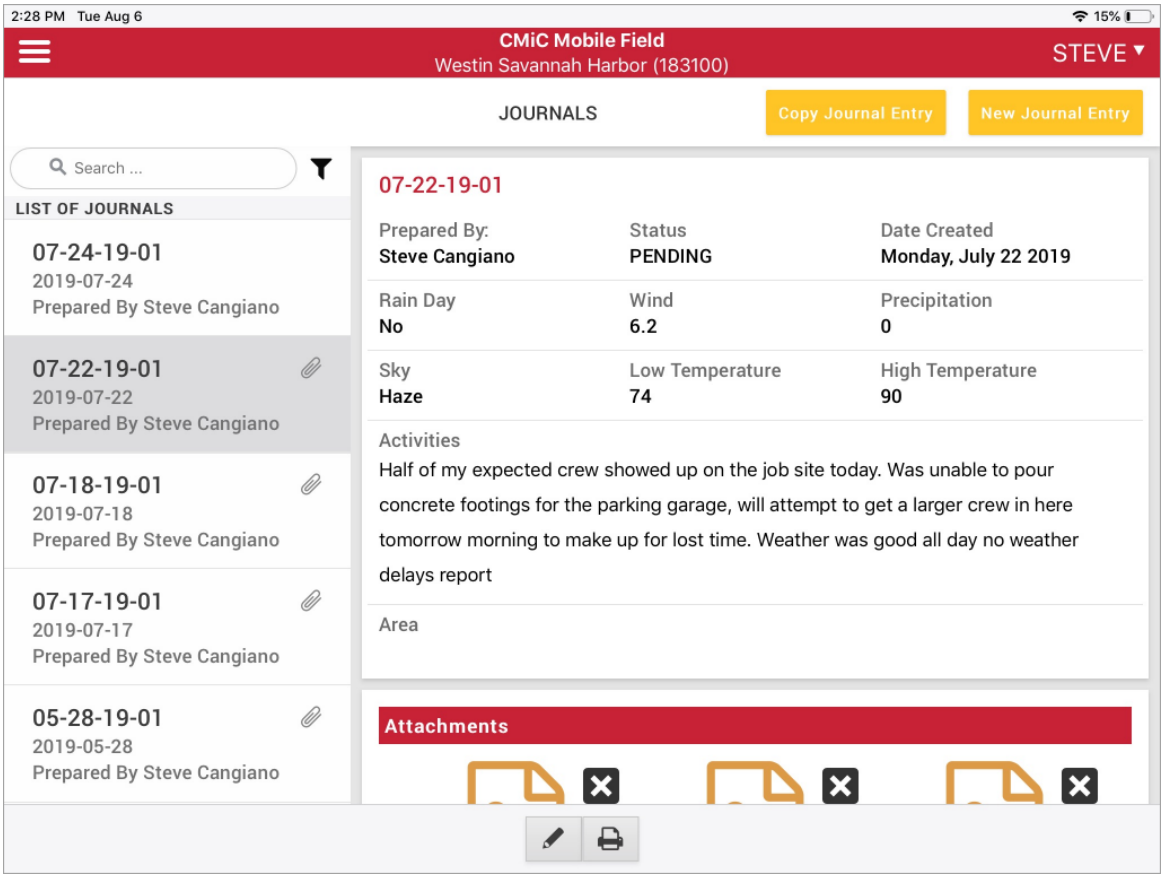
NOTE: Once a journal is submitted, it can no longer be edited.

Create New Journal

There are two options for creating new journals via this screen. To create a new entry from scratch, tap the yellow [**New Journal Entry**] button (top-left). To create a new journal based on a submitted one, select "Submitted" from the Filter icon's drop-down menu and tap [**Copy Journal Entry**]. For details about these buttons and the tabs of a journal, please refer to the sections that follow.

New journal entries can be saved on the device until they are ready to be submitted via the [**Save**] button, and submitted via the [**Submit**] button. When a journal is submitted, it will be assigned the next journal ID in sequence, based on the auto-numbering mask. Also, once submitted, it cannot be edited, but it can be viewed (see previous subsection, *Submitted Journals*).

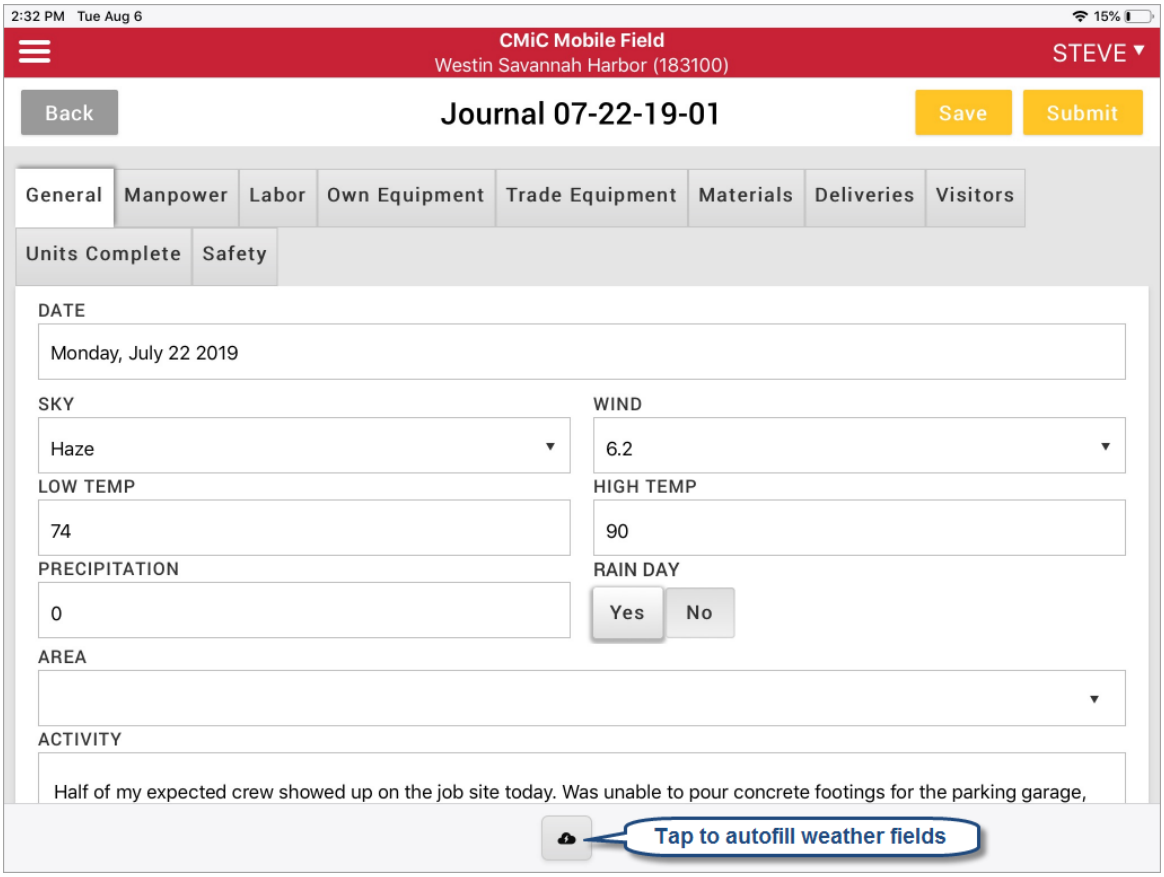
General – Tab



The General tab is the tab displayed in the above screenshot. It consists of a header, fields to track weather conditions, an Activities field to track daily activities, and any free-form user-defined fields. Also, attachments are viewed or added via this tab.

To view the other tabs, tap if "Pending" is selected in the Filter icon's drop-down menu, or if "Submitted" is selected.

Create/Edit Mode



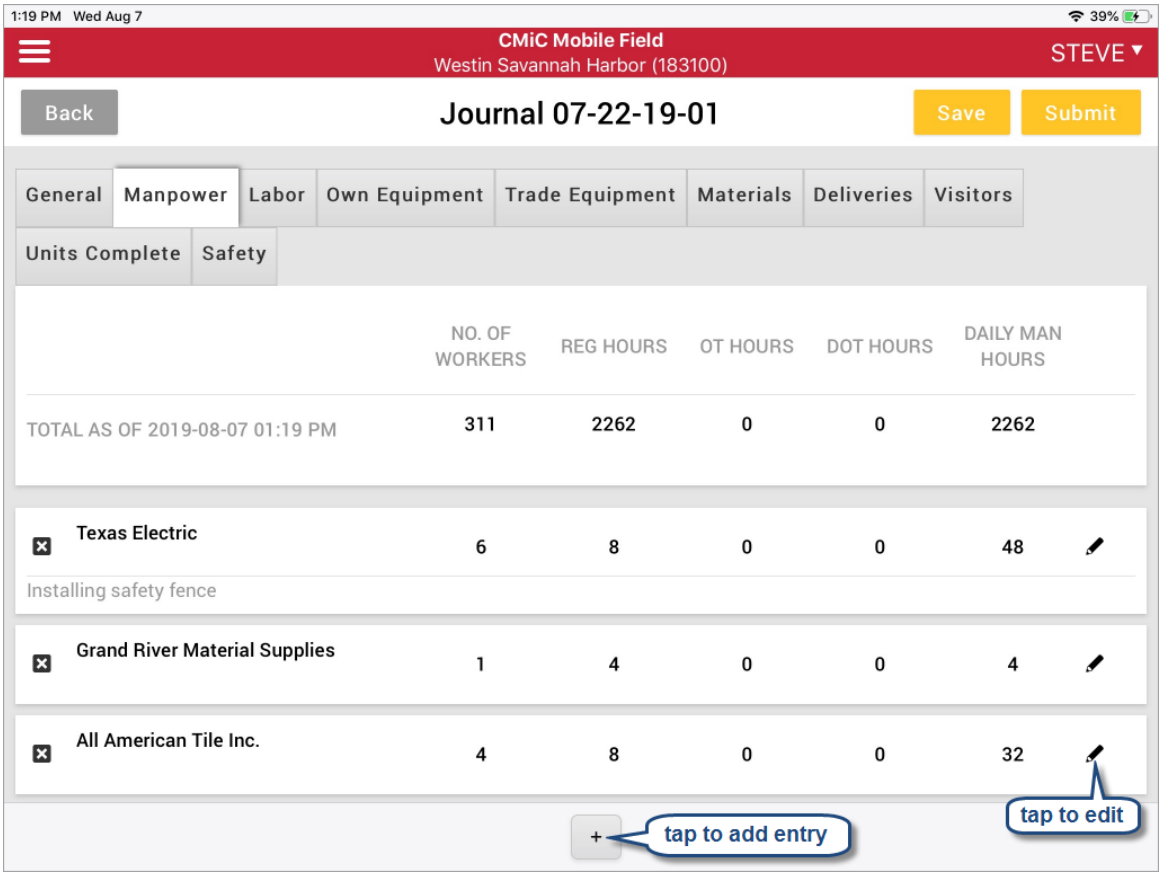
The fields for weather conditions can be automatically filled in or updated by tapping the Weather icon (internet connection required). This function will access the location, retrieve the local weather conditions, insert an image about the local weather (shown above), and update the weather fields.

Under the Attachments section, click on the Plus icon and use the Attachment icon to add any photos from the photo log, the Folder icon to add any documents, or the Camera icon to capture photos and add them as attachments.

Data Recovery Confirmation

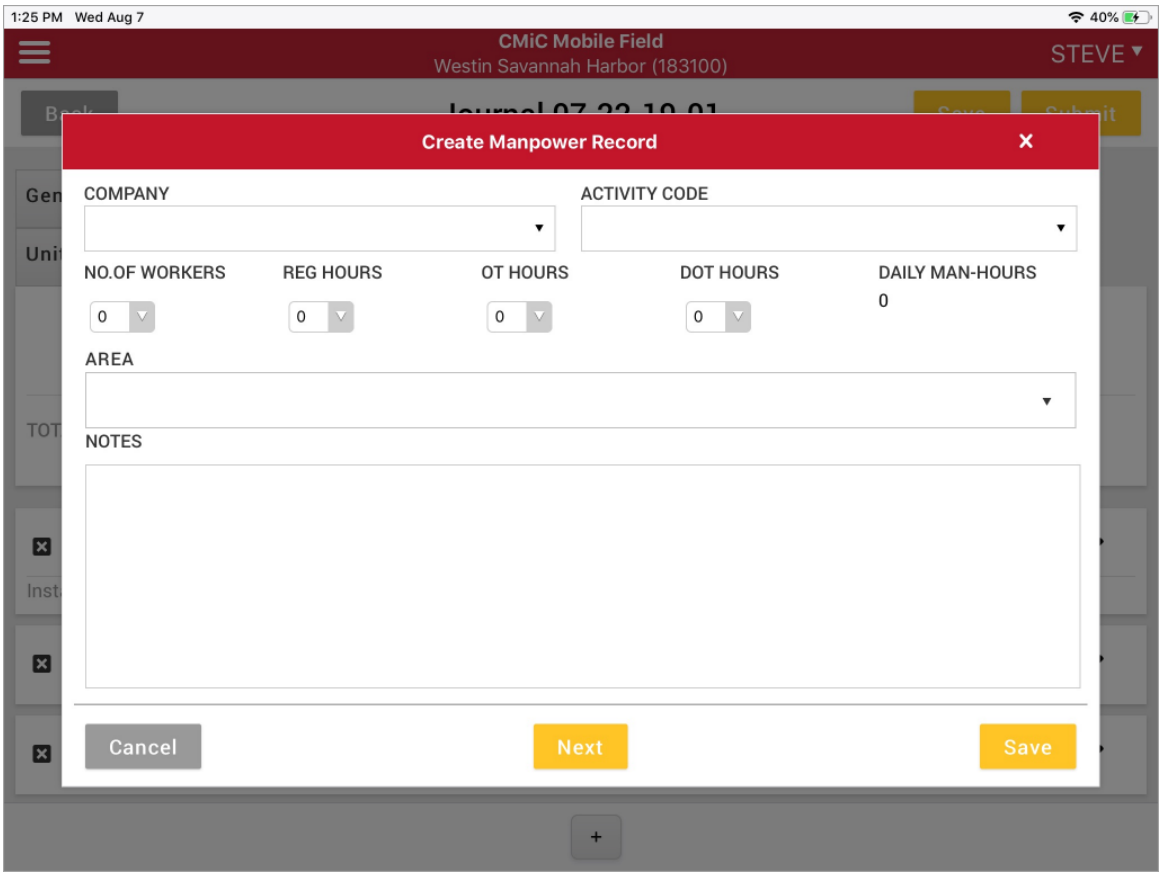
If data is entered in the journal and the user attempts to close the app before saving, the Data Recovery Confirmation pop-up window will be issued, prompting the user to confirm if they would like to save those unsaved changes using the [**Recover**] buton or discard them using the [**Discard**] button.

Manpower – Tab



The Manpower tab allows the user to record the number of workers and their work hours for a job. It is labeled "Tasks" on the Daily Report screen of CMiC Field. For details about this tab, refer to the following subsection in the *CMiC Field* reference guide: *Site Management > Adding Information to the Journal > Tasks*.

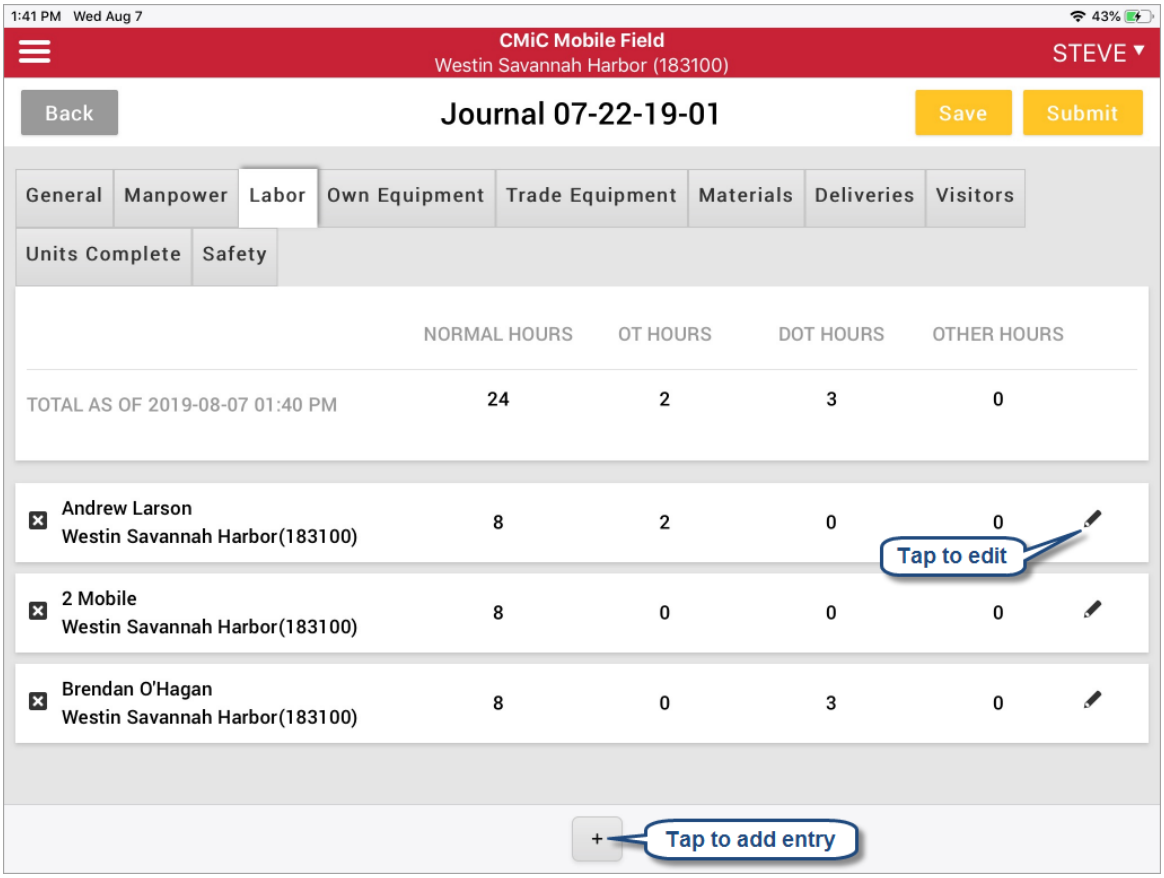
Tap the [+] button at the bottom of the screen to open a new input record for manpower:



Complete the entry of data and tap [**Save**], or if adding another record, tap [**Next**] to save the current record and to add another manpower record.

Under the Attachments section, click on the Plus icon and use the Attachment icon to add any photos from the photo log, the Folder icon to add any documents, or the Camera icon to capture photos and add them as attachments.

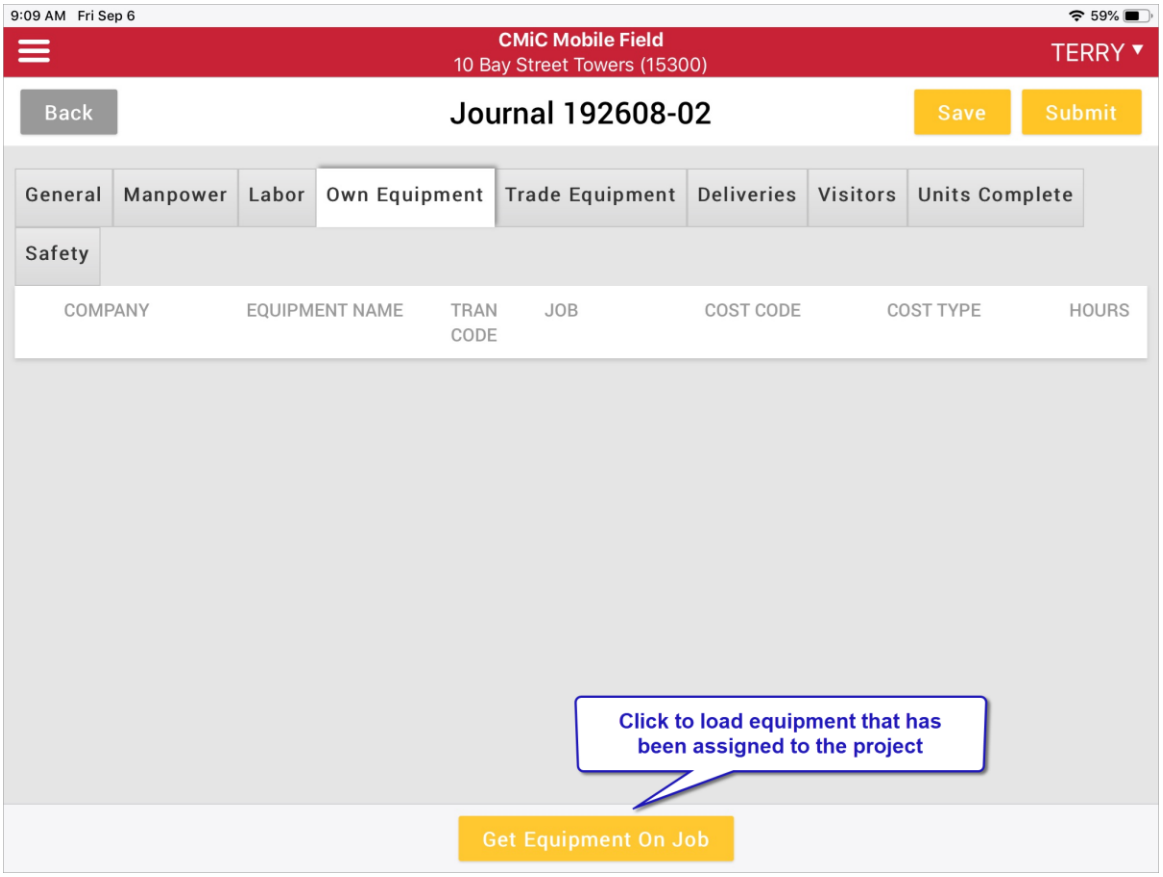
Labor – Tab



This tab is used to record the hours worked by individual employees, and once the journal is submitted, the Daily Report screen in CMiC Field can be used to create and fill out the timesheets for the employees. For details, refer to the following section in the *CMiC Field* reference guide: *Site Management > Adding Information to the Journal > Labor*.

To create a new labor record, tap the [+] button at the bottom of the Labor tab. Select the relevant values from the LOVs and enter the hours worked. When finished, tap [**Save**], or if adding another record, tap [**Next**] to save the current record and to add another labor record.

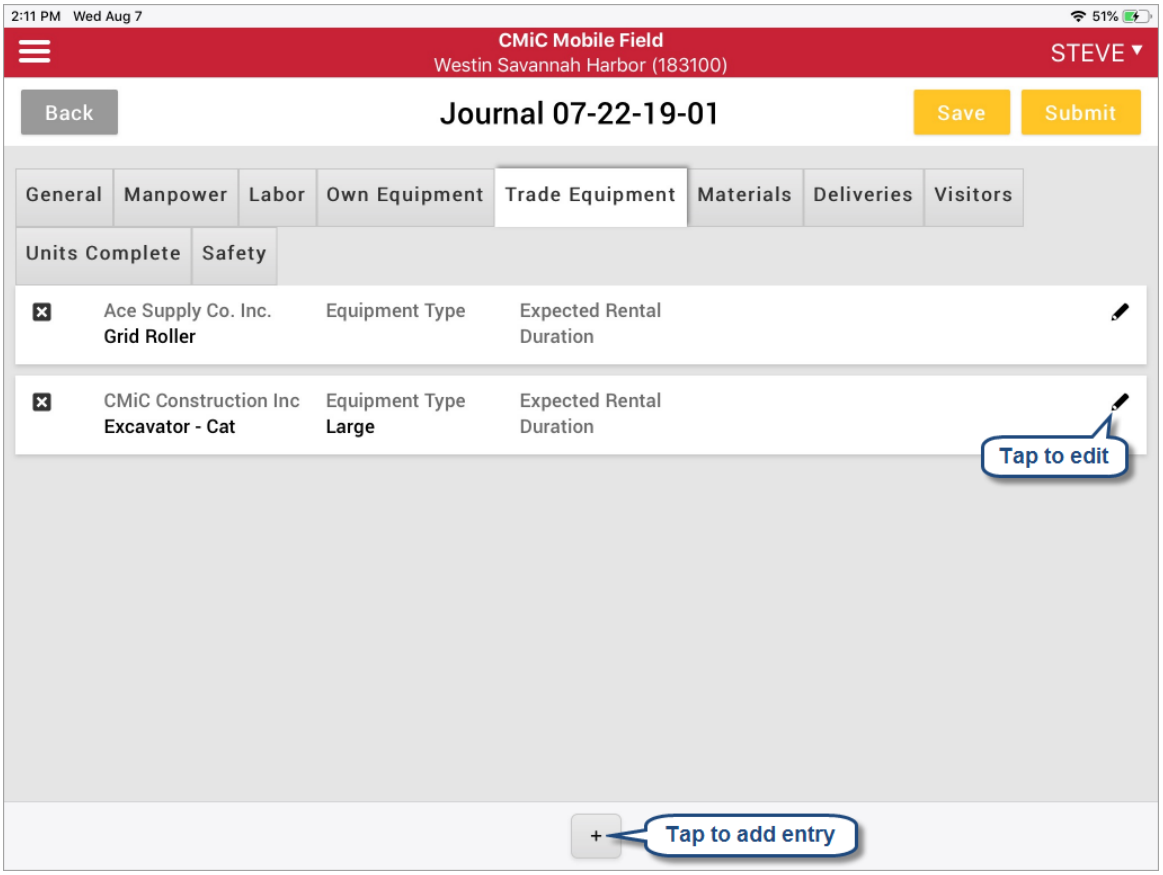
Own Equipment – Tab



This tab is used to record costs for the use of a company's equipment.

The [**Get Equipment On Job**] button is used with the Fixed Asset module when equipment has been assigned/requisitioned to the project. If equipment has been transferred to the job, it will appear on this screen when the user taps the button. When finished editing the record, tap [**Save**] to save the current record.

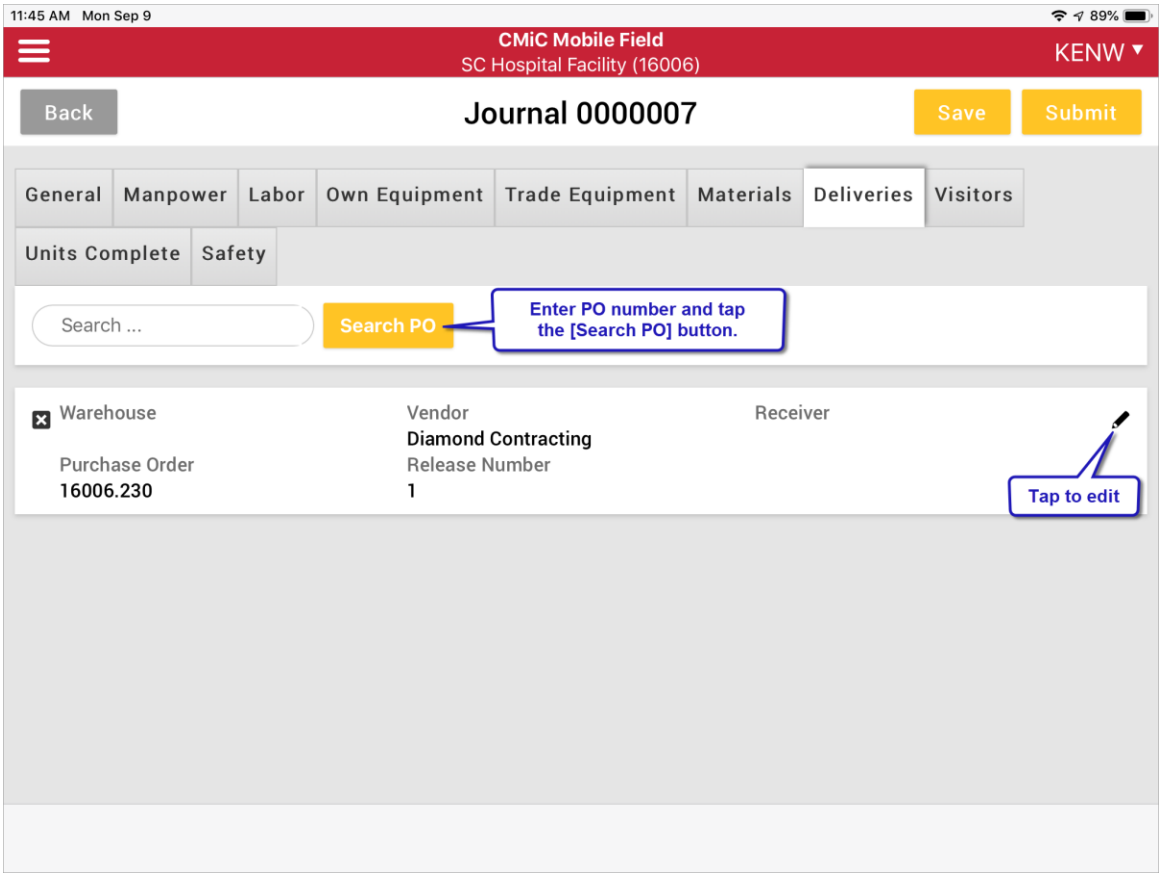
Trade Equipment – Tab



The Trade Equipment tab is used to track the use of rental or borrowed equipment.

To create a new entry, tap the [+] button, fill out the details, and tap [**Save**], or tap [**Next**] to save it and add another entry.

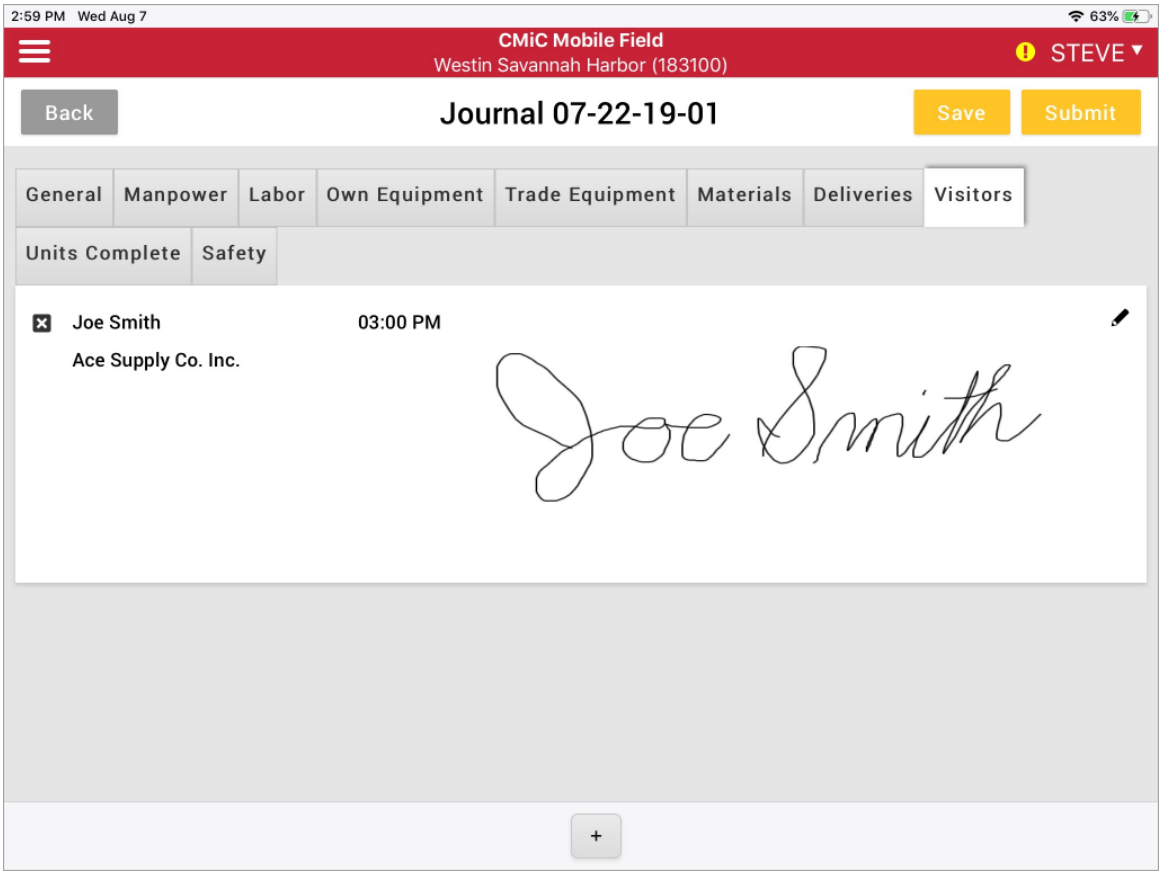
Deliveries – Tab



The Deliveries tab is used to track deliveries. In the Search field, enter a PO number that has been allocated to the project's job and tap the [**Search PO**] button to retrieve any detailed lines of the purchase order.

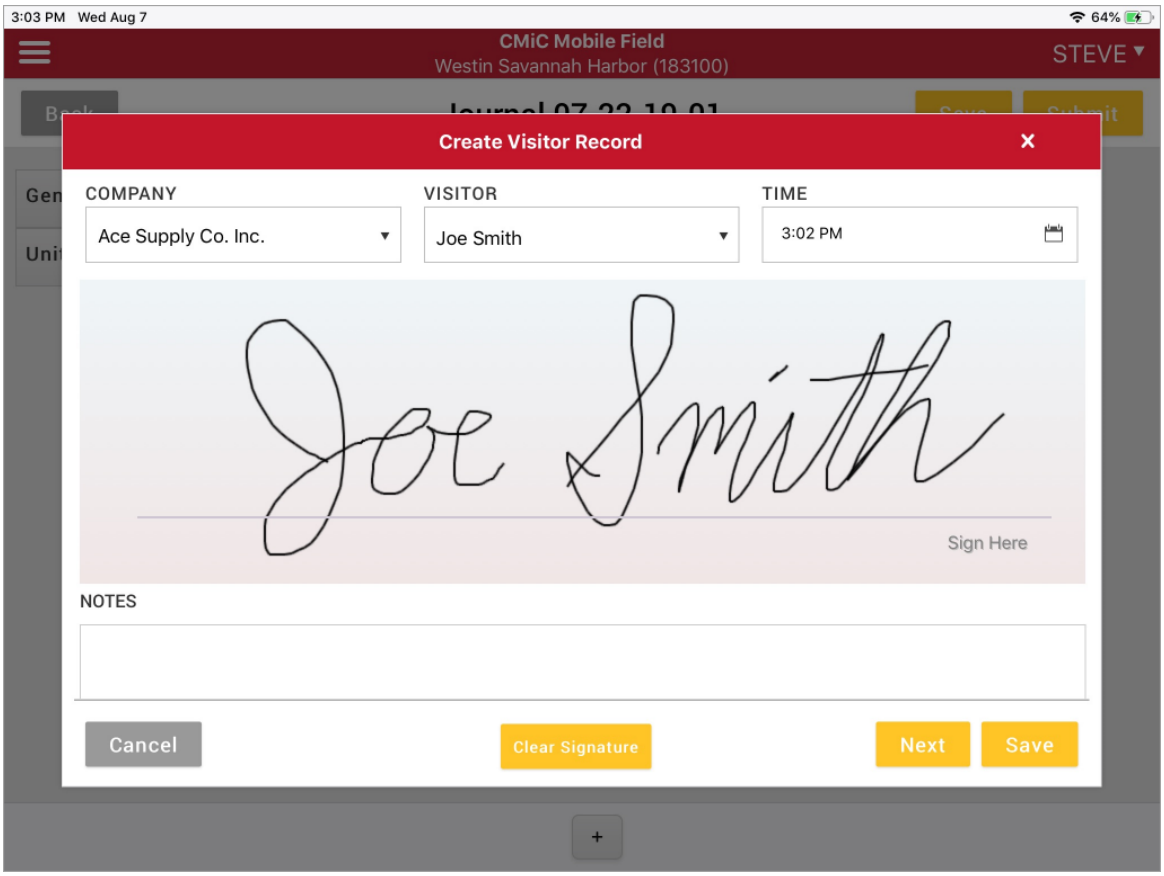
Tap on the Edit icon to edit the receipt and enter the number of units that were received. When done, tap [**Save]** to create an unposted receiving ticket.

Visitors – Tab



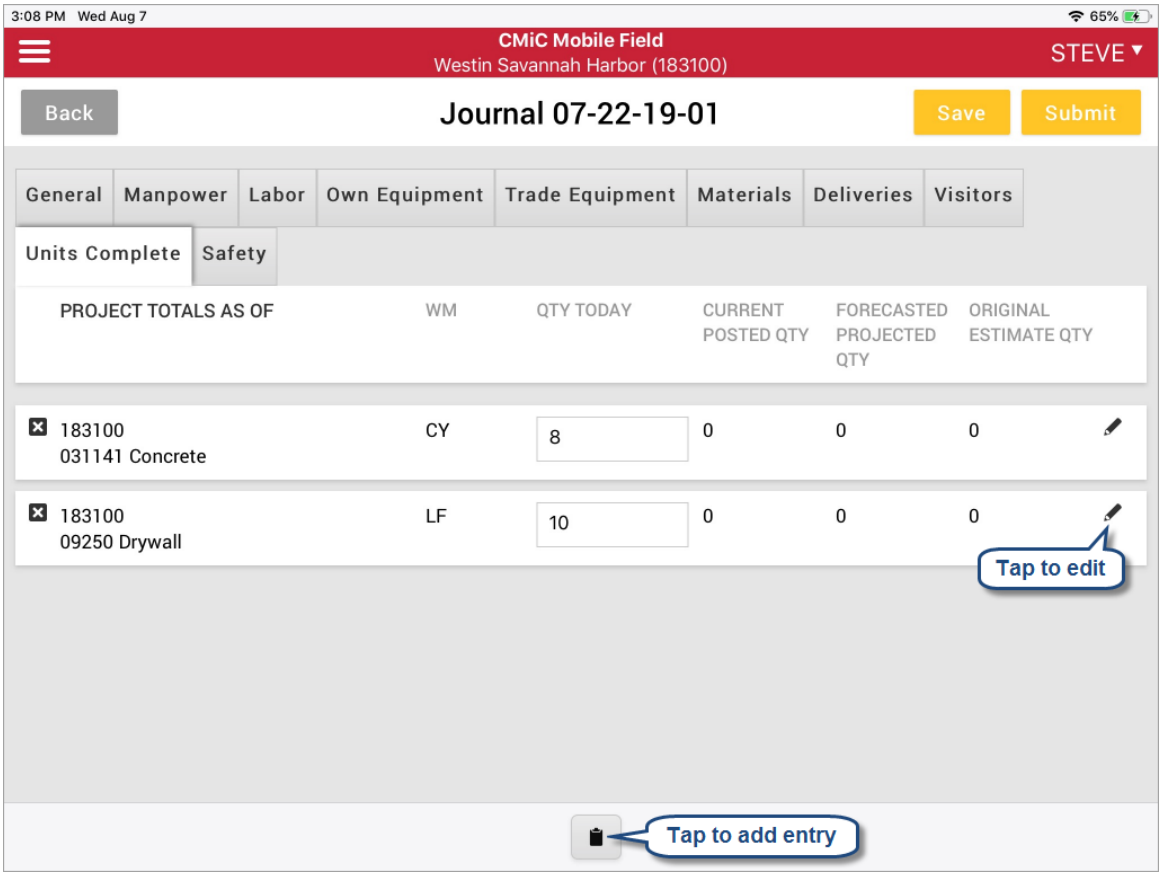
This tab is used to record visitors to the site, and it can be used to take their signatures.

To add an entry, tap the [+] button to launch the following pop-up window, which can be used to take the visitor's signature. The pop-up window's [**Clear Signature**] button is used to clear the signature field. Under the Attachments section, click on the Plus icon and use the Attachment icon to add any photos from the photo log, the Folder icon to add any documents, or the Camera icon to capture photos and add them as attachments.



Tap [**Save**] to save the entry, or tap [**Next**] to save it and add another entry.

Units Complete – Tab



The Units tab is used to record the number of completed units in a day against a cost code.

To create new entries, tap the icon, and via the pop-up window, select one or more cost codes (a checkbox will appear next to the code to indicate that it has been selected) and tap [**Cancel**] to close the pop-up window. An entry for each selected cost code will have been created. Next, tap the Edit icon of an entry to enter its details, and tap [**Save**] when done.

Safety – Tab

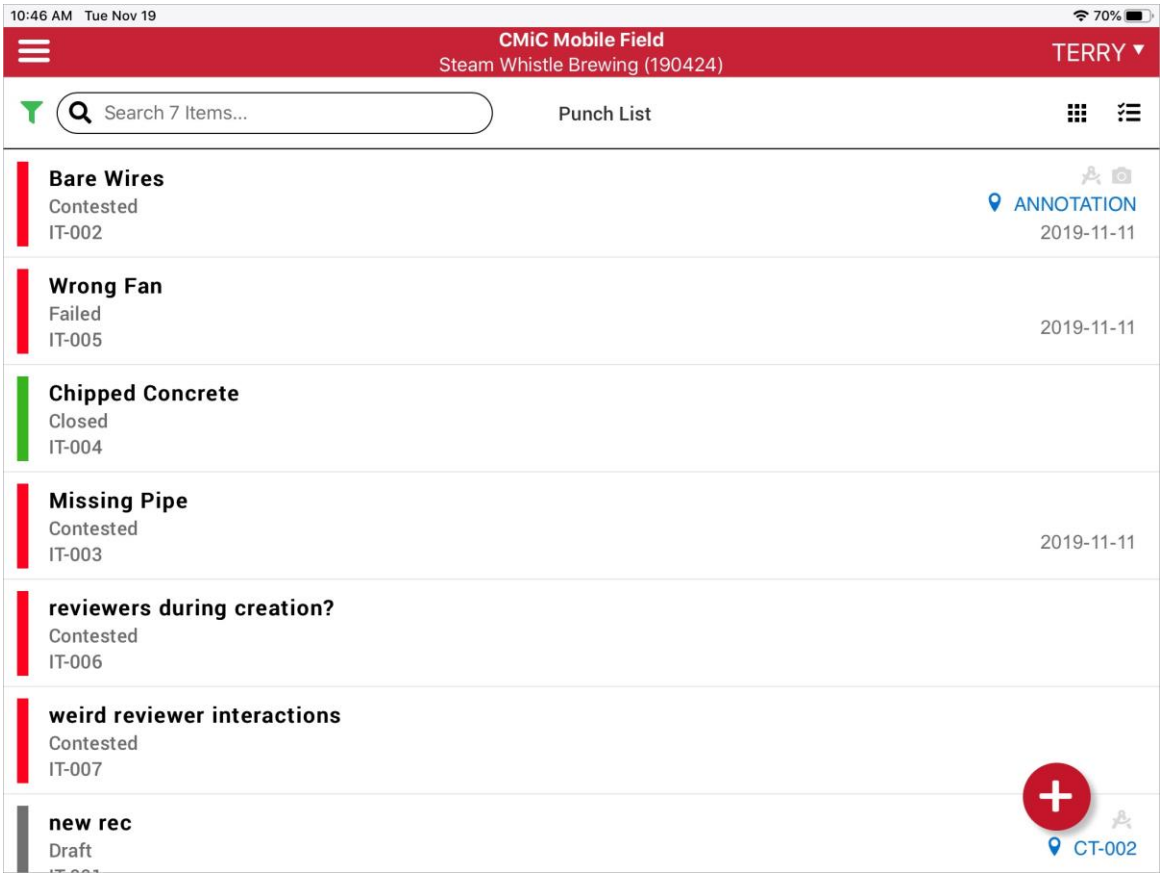
The Safety tab is used for safety management, and its fields are entered or edited on the tab.

Punch List – Screen

Tap the Punch List icon

to launch the Punch List screen. This screen contains punch lists which is a to-do list that tracks who needs to complete a task, what the task is, where it's located, and when it needs to be completed.

Punch List Item Log View



This is the main screen that appears when launching the Punch List icon from the main menu. It shows all punch list items created for the project that the user has viewing access for.

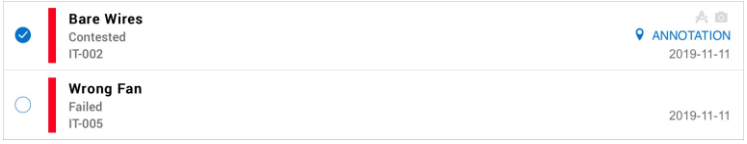
Search Bar

This search bar provides the user the ability to perform a search for all rows of the punch list item data. The fields searched include:

- Punch ID
- Description
- Due Date
- Status
- Responsible Contractor
- Company of Responsible Contractor
- Location
- Drawing Reference
- Trade

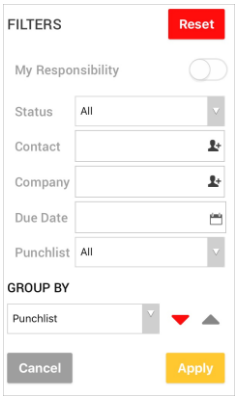
Bulk Actions – Icon

Pressing this icon will enable the bulk actions mode and the icon color will turn green. When this is enabled, a checkmark displays on each item card and pressing anywhere on the item card selects/deselects it. Selected item cards have a red checkmark and a light blue overlay, as shown below.



Filter Menu – Icon

This opens the filter menu which gives the user the ability to filter and sort list items.



Item Cards

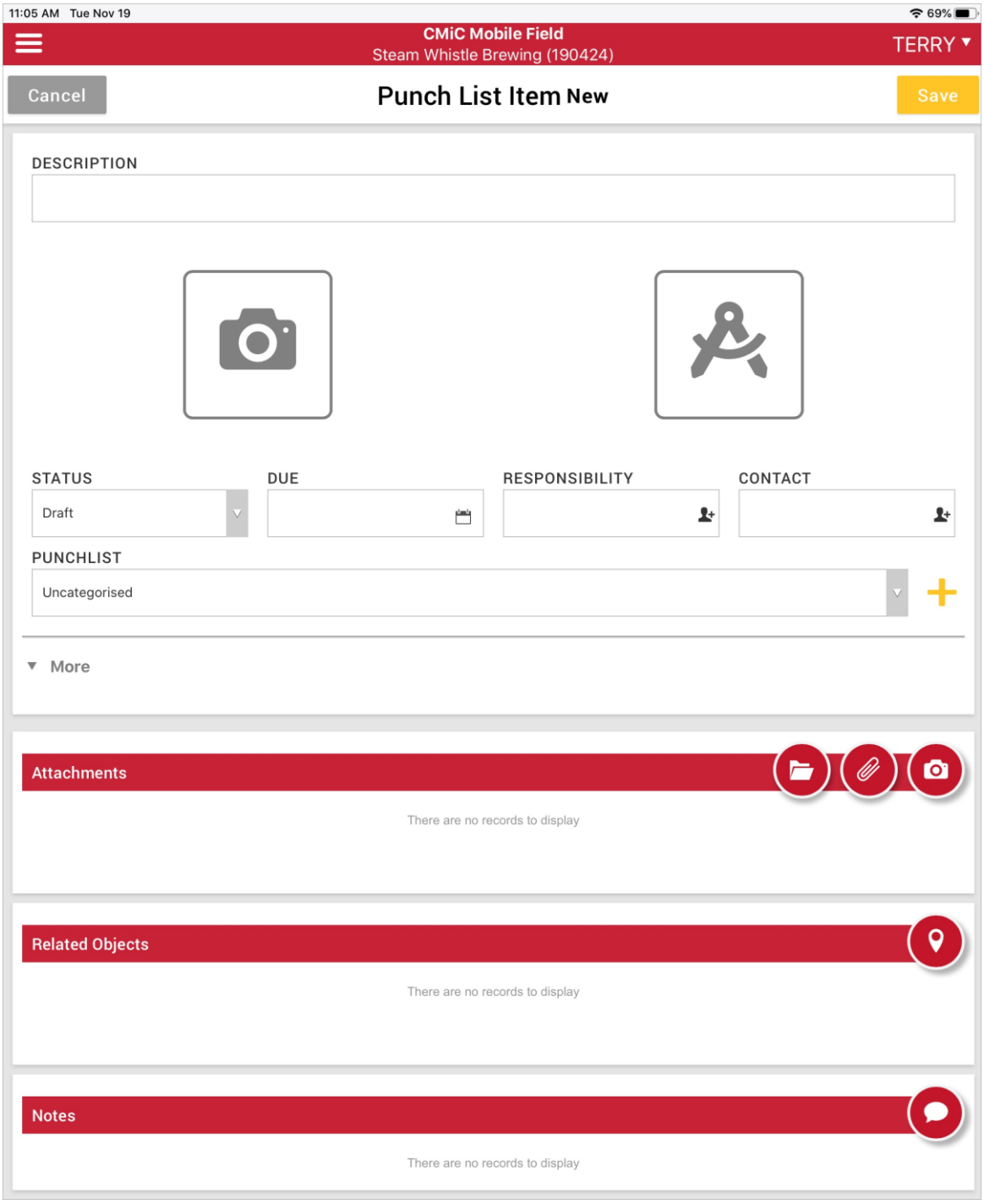
The item cards display key project data, such as their status, mask ID, description, and due date. The color of the card indicates their current status, as described below:

- Grey – Draft
- Blue – Assigned
- Green – Closed
- Red – Contested
- Yellow – Review

Item cards also display the following attachment indicators, if present on the record:

- - Drawing
- - Photo
- ANNOTATION - The drawing thumbnail will take the user to the annotation location in the Drawings screen when tapped.
- - Not synced to cloud

Creating and Editing a Punch List



The red Create New icon will open a Punch List Item screen where users can create a new punch list item record while in the field. To edit an existing punch list, users can tap an item card in the log view to open the Punch List Item screen. The following describes the fields available on this screen.

Status

By default, the Status field is set to draft. The drop-down list displays a list of available statuses that can be selected.

Due Date

A due date can be selected using the calendar drop-down that appears when this field is pressed.

Responsibility

This field launches the Select Contact screen where a contact can be selected to be assigned responsibility for the punch list. If a contact is selected, the Status field automatically changes to “Assigned”. Otherwise, the Status field will remain as “Draft”.

Contact

Select a contact from the Select Contact screen.

Description

Enter a description for the punch list.

Attach Photo – Icon

This launches the camera app and allows the user to take a photo or select an existing photo from the camera app.

Attach Drawing – Icon

This icon launches the pin drawing feature which allows the user to create an annotation and link a drawing to the punch list.

Punch List

Select a punch list category. By default, “Uncategorized” is selected.

Area 1, Area 2, Area 3, Area 4

Enter values for area 1, area 2, area 3, and area 4.

Attachments

Select one of the three attachment options to attach a file or photo. The Camera icon allows the user to take a photo using the camera app, the Paperclip icon allows the user to select a photo saved on the phone, and the Folder icon allows the user to select a file from the document log in the app.

Related Objects

Tapping on the Pin icon opens the Drawings screen where users can select a drawing, place an annotation, and save it. The created annotation will be linked to the punch list.

Notes

Tapping the Notes icon will expand the section to display the Add A Note field, where users can type in a note and tap the icon to submit it.

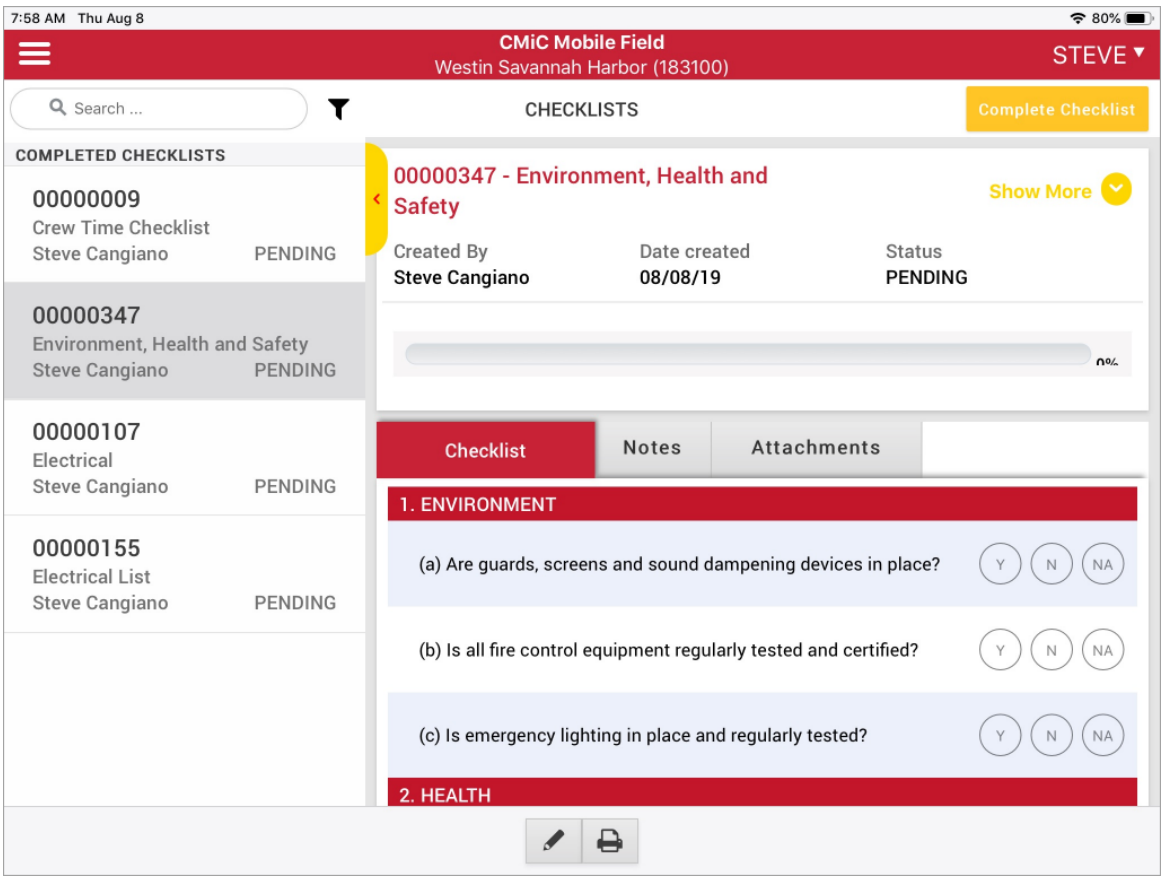
[**Cancel**] – Button

Tapping this button returns the user to the log view without saving any changes.

[**Save**] – Button

Saves the data and creates the new record in the system. After saving is complete, the user is taken back to the log view.

Checklist – Screen



Tap the Checklist menu item

to launch the Checklist screen.

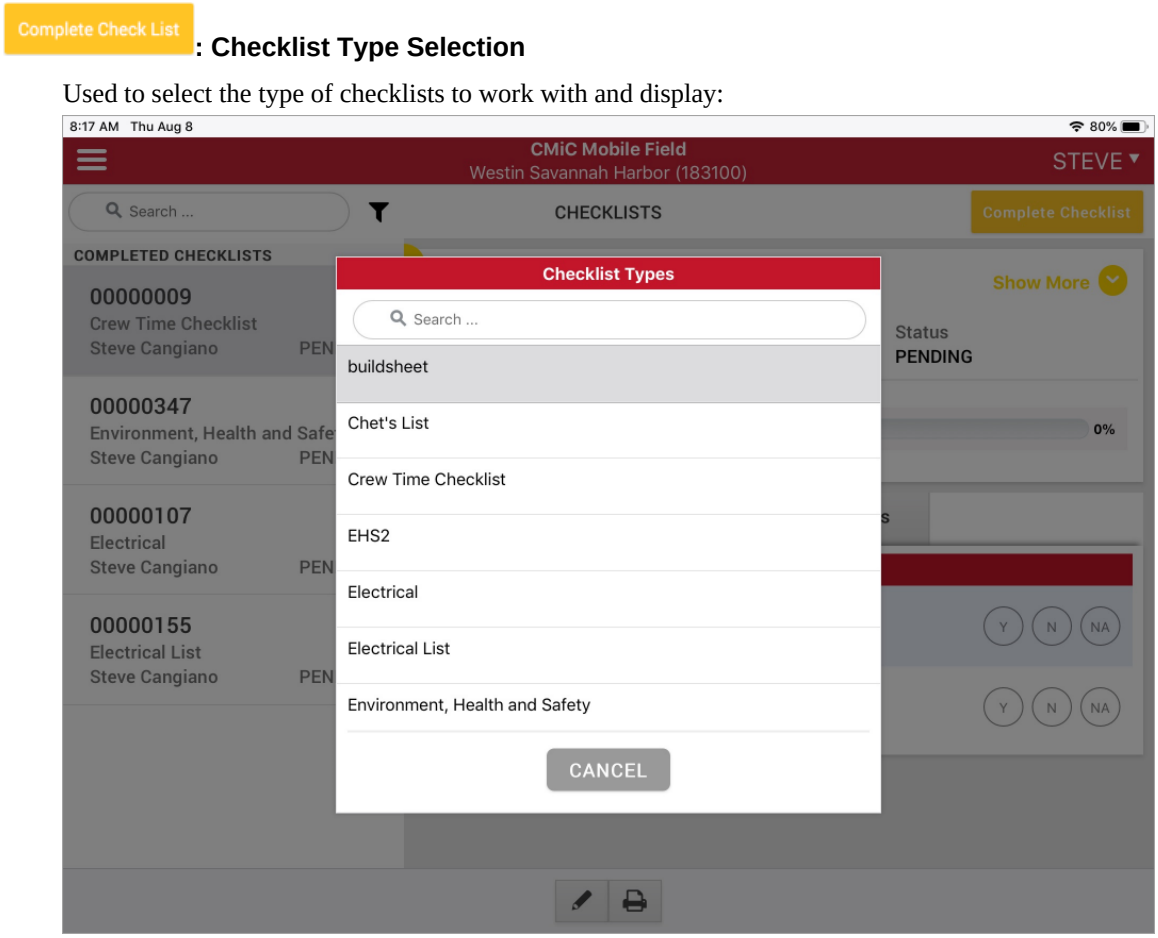
This screen lists checklists in the left Completed Checklists pane for the selected type, and it displays the selected checklist in the right pane.

For details about checklists, please refer to the *CMiC Field's* reference guide's *Checklists* subsection, under *Site Management*.

Screen's Main Controls

: Expand Checklist Pane

Tap to expand the Checklist pane.



: Checklist Type Selection

Used to select the type of checklists to work with and display:

: Search/Filter Listed Checklists

Used to filter the checklists in the left pane according to the entered search text.

: Create Checklist of Selected Type

Also used to create an instance of the selected checklist type.

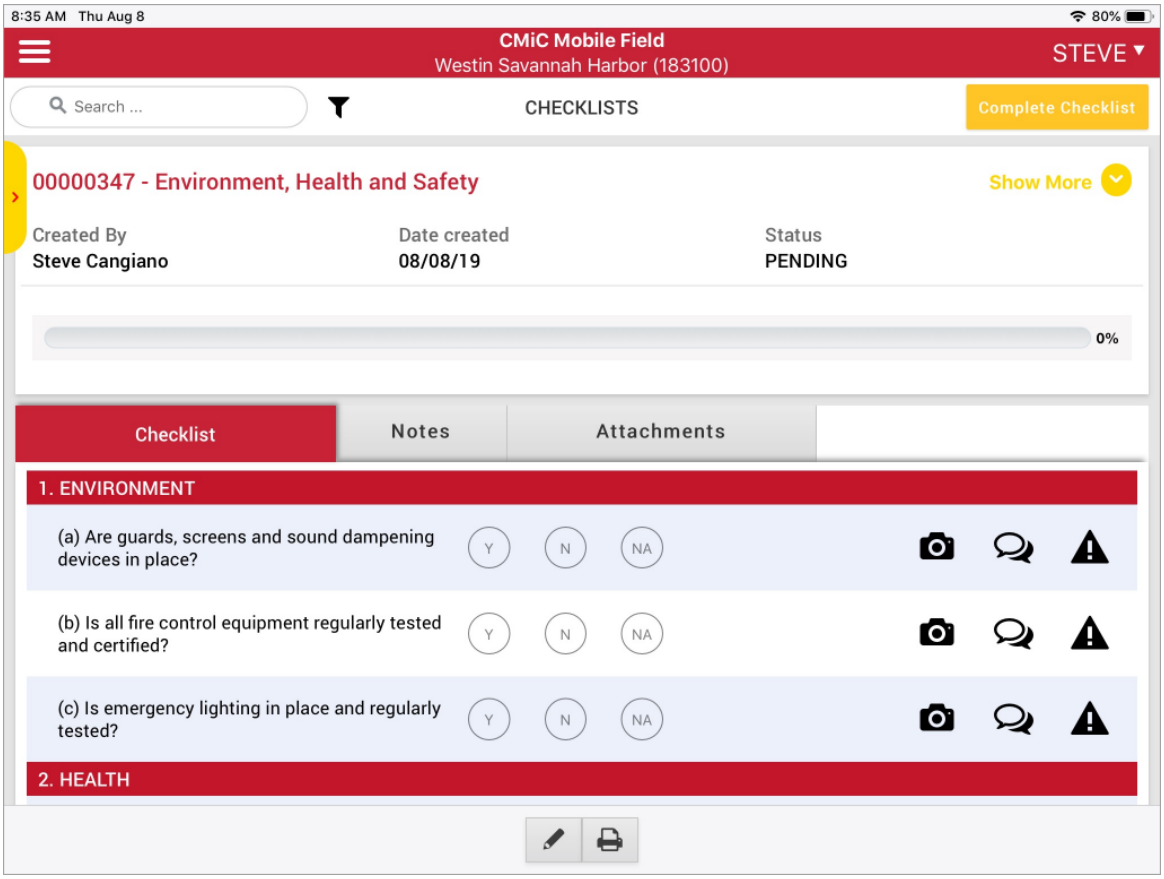
: Edit Checklist

Tap to edit the displayed checklist.

: Email Report

Tap to email a report for the displayed checklist.

Checklists



This pane displays the checklist selected via the Completed Checklists pane.

It has a button [**Show More/Show Less**] that expands or collapses the header data when tapped.

To edit a checklist, tap the Edit icon (located on the bottom of the screen). On saving, a checklist number is assigned to the record, based on the auto-numbering mask that was set up for checklists when the project's defaults were set up.

When checklist items are completed with "Y", it is determined as a completed item out of the total number of items. This is the percent complete that is represented by the green progress bar in the header.

For example, if the checklist has 7 items in all, and only 3 items has been completed with a response as "Y", then the percent completion bar would show 3/7 x 100% = 42.86%.

Pane's Controls

NOTE: If there is a number on one of following icons, e.g. , it indicates how many corresponding items (photos/comments/issues) are associated to the checklist item.

: Add Comment to Checklist Item

Tap to add a comment to the corresponding checklist's item (line)

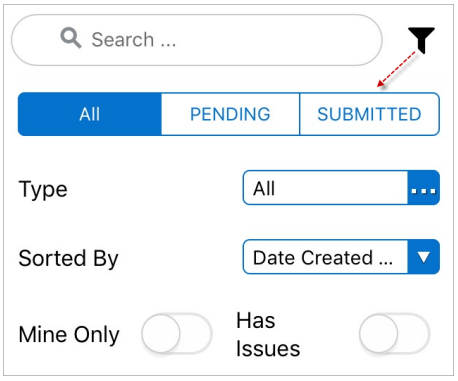
: Photo Capture or Add Attachment

Tap to take a photo or to add a photo as an attachment to the corresponding checklist item.

: Create Issue for Checklist Item

Tap to create an issue against the checklist item.

Search & Filter Checklists



To search for a checklist among those listed, tap the Search field, enter text to search against, and tap the device's Return keyboard key. All matched checklists will be displayed in the left pane of the screen. Use the within the Search field to clear the search results and return to the full list of checklists.

To filter the listed checklists, tap the Filter icon to display the available filter parameters for checklists, as shown above.

Filtering can be done by status ("All", "Pending", "Submitted"), type, whether or not checklists are owned by the user, and by whether or not checklists have associated issues. To only list checklists that are owned by the user, enable the Mine Only toggle, and to only list checklists with issues, enable the Has Issues toggle.

The Type field carries a multi-select LOV allowing the user to select multiple parameter values by which to filter.

The Type field lists the checklist types set up in CMiC Field via the Checklist Maintenance screen (standard Treeview path: *CMiC Field > File Maintenance > Local Tables > Checklist Maintenance*).

The filtered results can be sorted by selecting a sort sequence via the Sorted By field. The default sort sequence is "Date Created New to Old".

When a filter parameter is in use (e.g., "All" is not selected for the Status or Type fields) or the Sorted By field is not set to its default ("Date Created New to Old"), the color of the Filter icon changes from black to green to indicate it is active.

NOTE: If the filter is in use, the Search field can be used to search the list of filtered checklists.

Checklist – Tab

The Checklist tab contains the checklist items.

Notes – Tab

The Notes tab lists notes for the checklist.

To add a note, enter its text in the Add A Note field and tap the Post Note icon . To delete a note, tap its corresponding [**X**] button.

Attachments – Tab

The Attachments tab contains the checklist's attachments.

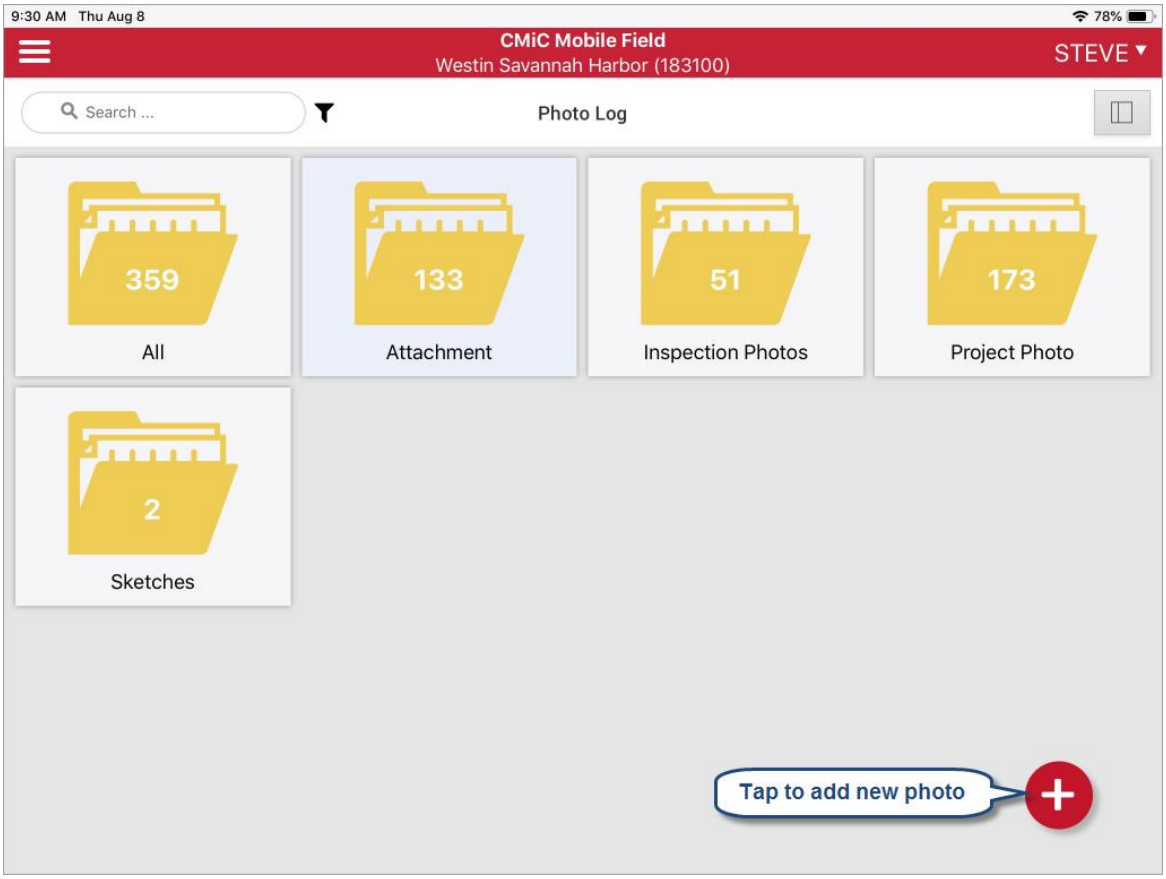
To add a photo that is saved on the device, tap the Attachments icon. To use the device's camera to take and add a photo, tap the Camera icon. To delete an attachment, tap the [**X**] icon on the attachment.

Linking Checklists & Issues

Checklists are linked to issues by tapping the icon. It will launch the Issues Entry screen for the user to enter the issue details.

In Mobile Field, multiple issues can be associated to the same checklist item. The number to the top-right of the icon indicates the number of issues linked to the checklist item (e.g.).

Photo Log – Screen



Tap the Photo Log menu item to launch the Photo Log screen. This screen is used to create a photo log record on-site, with the use of the device's camera, or by selecting a photo that is saved on the device. Once detailed, it can be added to a new RFI, daily journal, punch list, or to the photo log (for later use, or historical purposes).

The screen's left pane shows a list of recent photo log records, and its right pane displays the selected record, which is comprised of a photo, date, name, description, and comment.

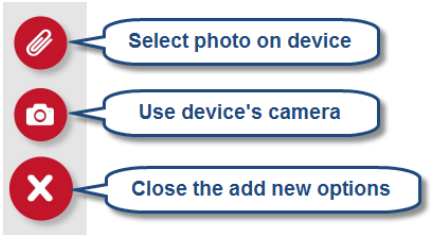
NOTE: After a photo is added to one of the four possible objects, it may take a few minutes before it shows up for the object.

Screen's Main Controls

: Search/Filter Listed Records

Used to filter the photo log records in the left pane according to the entered search text.

: Add Photo



Used to create a new photo log record so that it can be added to a new RFI, daily journal, PCI, submittal, or issue. The photo is automatically added as the newest record in the selected object.

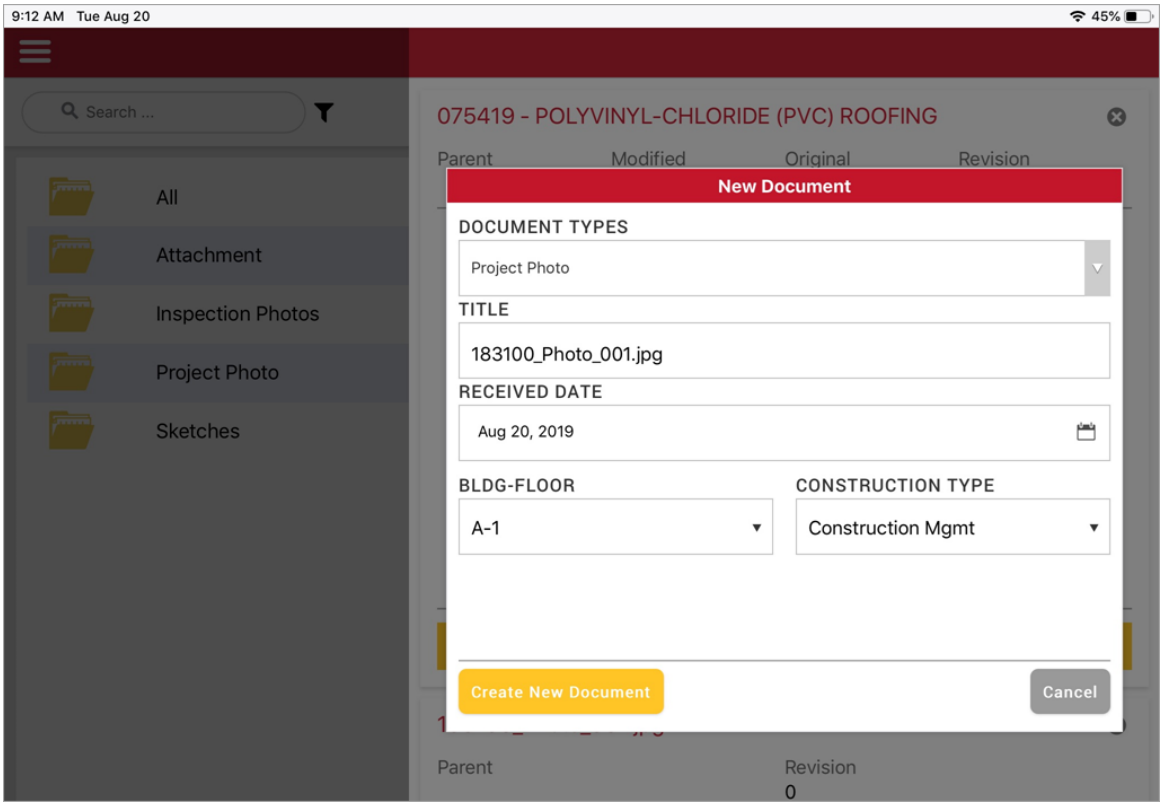
After using one of the add options, a pop-up window will appear asking the user to link the photo to an object or create a new document.

/

: Toggle Display Modes (Standard or Gallery)

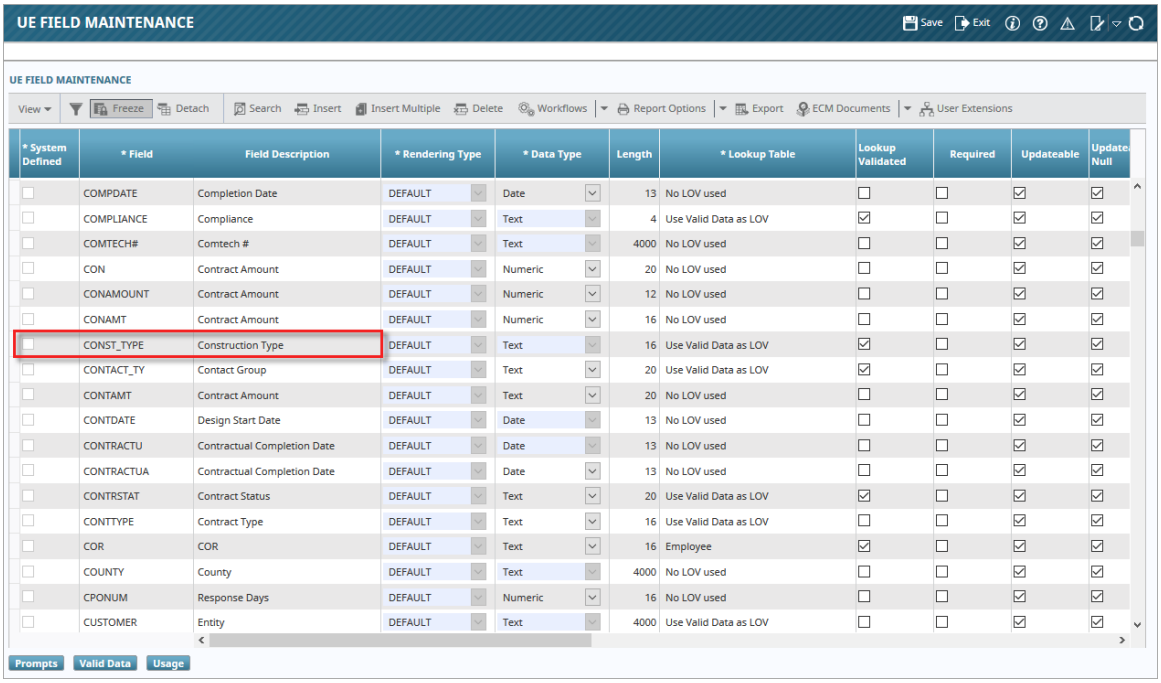
Tap to toggle between this screen's display modes: standard and gallery. In standard mode, records are displayed in a list, and in gallery mode, the record's photos are displayed in a gallery.

User Defined Fields



User-defined fields can be set up and used when creating new documents from photos. After taking or uploading a photo, tap the [+ **New Document**] button in the Revision pane to bring up the New Document pop-up window shown in the above screenshot. Here, users can enter values for user-defined fields, such as Bldg-Floor and Construction Type, and save the photo as a new document, which can then be edited/viewed in the Documents screen of CMiC Mobile Field.

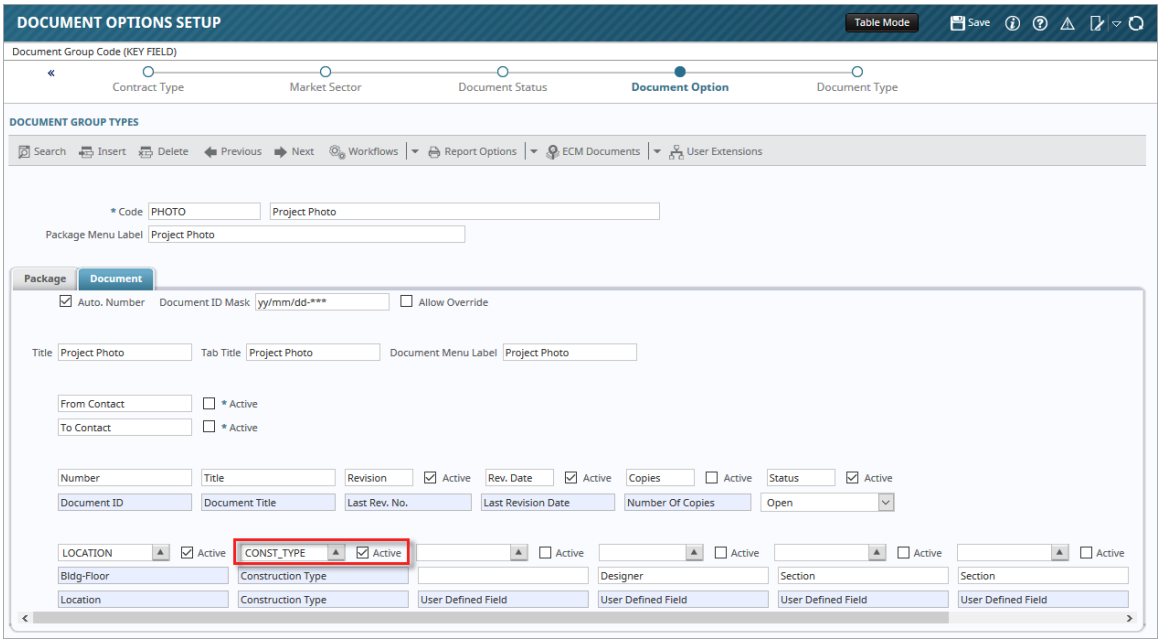
Setting Up User-Defined Fields for Mobile Integration



* System Defined	* Field	Field Description	* Rendering Type	* Data Type	Length	* Lookup Table	Lookup Validated	Required	Updateable	Update Null
	COMPDATE	Completion Date	DEFAULT	Date	13	No LOV used				
	COMPLIANCE	Compliance	DEFAULT	Text	4	Use Valid Data as LOV				
	COMTECH#	Comtech #	DEFAULT	Text	4000	No LOV used				
	CON	Contract Amount	DEFAULT	Numeric	20	No LOV used				
	CONAMOUNT	Contract Amount	DEFAULT	Numeric	12	No LOV used				
	CONAMT	Contract Amount	DEFAULT	Numeric	16	No LOV used				
	CONST_TYPE	Construction Type	DEFAULT	Text	16	Use Valid Data as LOV				
	CONTACT_TY	Contact Group	DEFAULT	Text	20	Use Valid Data as LOV				
	CONTAMT	Contract Amount	DEFAULT	Text	20	No LOV used				
	CONTDATE	Design Start Date	DEFAULT	Date	13	No LOV used				
	CONTRACTU	Contractual Completion Date	DEFAULT	Date	13	No LOV used				
	CONTRACTUA	Contractual Completion Date	DEFAULT	Date	13	No LOV used				
	CONTRSTAT	Contract Status	DEFAULT	Text	20	Use Valid Data as LOV				
	CONTTYPE	Contract Type	DEFAULT	Text	16	Use Valid Data as LOV				
	COR	COR	DEFAULT	Text	16	Employee				
	COUNTY	County	DEFAULT	Text	4000	No LOV used				
	CPONUM	Response Days	DEFAULT	Numeric	16	No LOV used				
	CUSTOMER	Entity	DEFAULT	Text	4000	Use Valid Data as LOV				

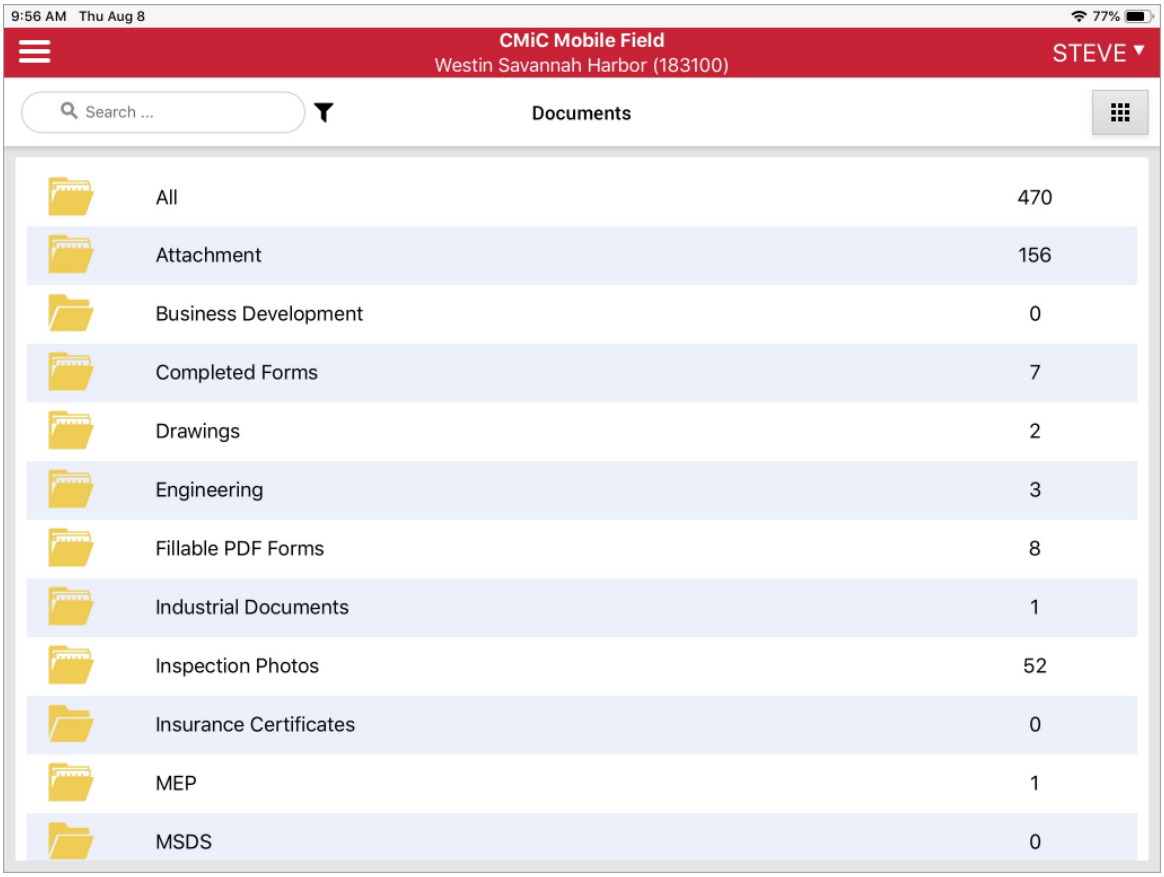
Pgm: UEFIELD – UE Field Maintenance; standard Treeview path: System > User Extensions > Field Maintenance

User-defined fields can be created in the Field Maintenance screen by clicking the [**Insert**] button on the Block Toolbar. After creating the user-defined field, navigate to the Document Options node in the Maintain Data Process screen and edit the "Photo" document group type. In the Document tab, select a user-defined field in the LOV field (shown in the red box below) and check the 'Active' box. Click [**Save**] to save the changes.



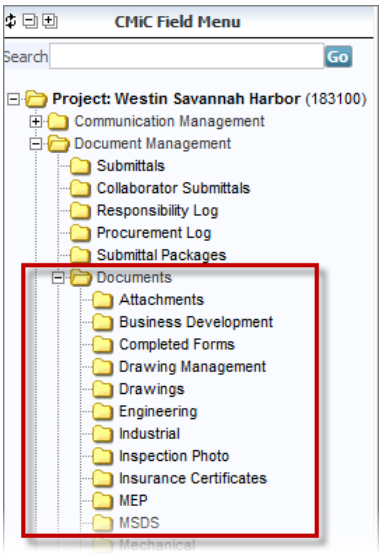
Pgm: PMOPTFM – Document Options Setup; standard Treeview path: System > Global Tables > Maintain Data Process – Document Option node

Documents – Screen



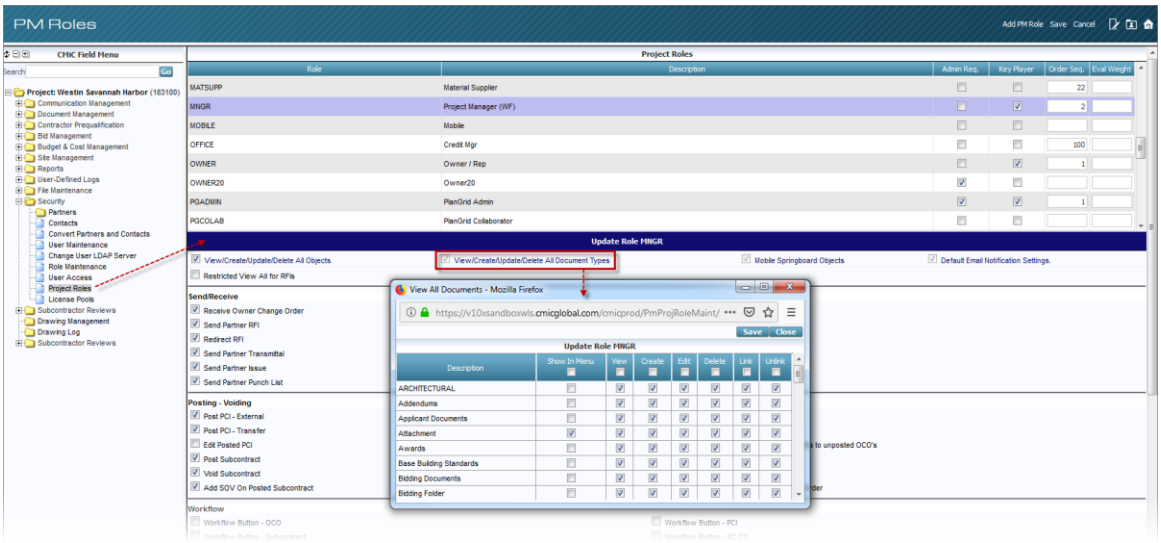
The Documents screen is launched by tapping the Documents menu item .

The Documents screen is used to view the project's documents, which have been added using the Documents Treeview options in CMiC Field (standard Treeview path: *CMiC Field > Document Management > Documents*):



This screen lists documents of the type selected via the Document Types drop-down selection box. Due to performance considerations, the listed documents are not stored on the device, but they are downloaded to the device when tapped.

The document types to which a Mobile Field user has rights are granted to the user's PM role via the Project Roles screen in CMiC Field, as shown below:



Screen's Main Controls

: Search/Filter Listed Documents

Used to filter the listed documents according to the entered search text.

/

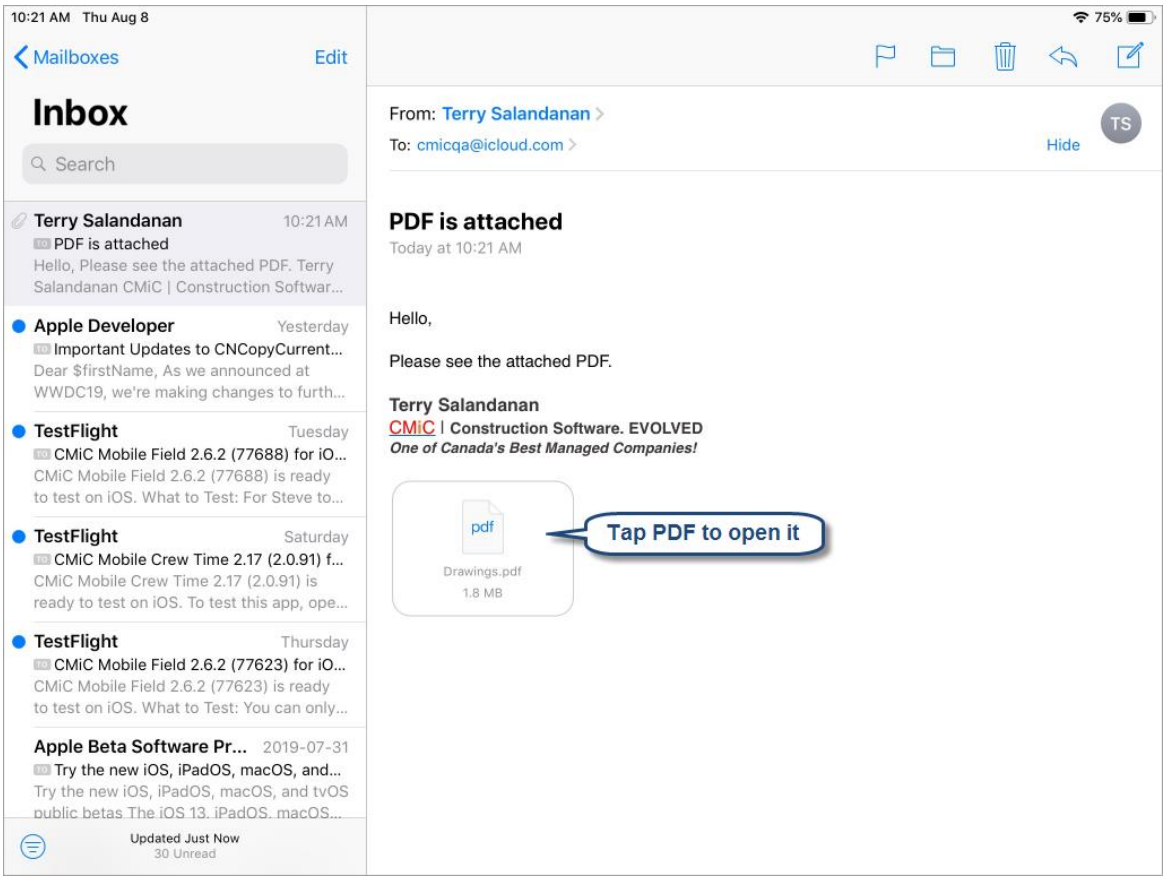
: Toggle Display Modes (Standard or Gallery)

Tap to toggle between this screen's display modes: standard and gallery.

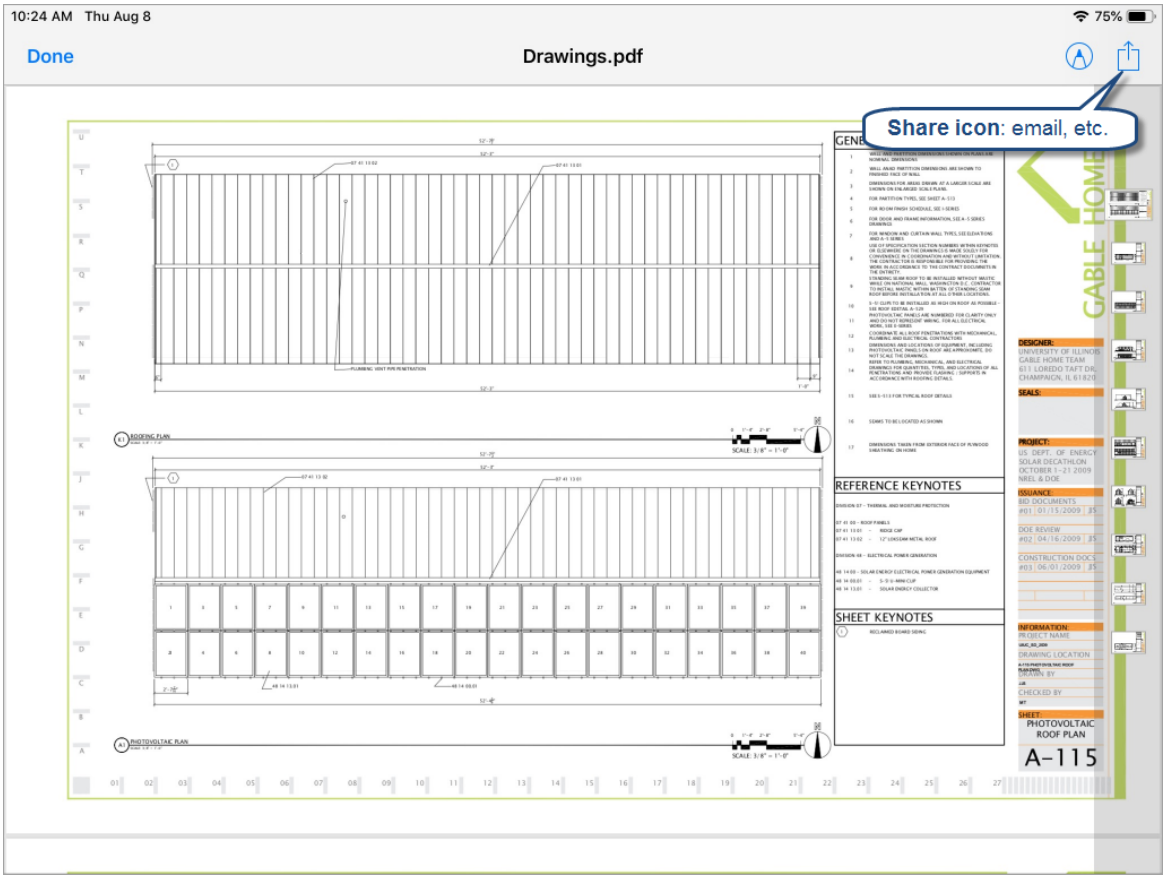
Importing PDFs from Emails into Mobile Field

PDFs attached to emails can be imported into Mobile Field in order to mark them up and use them in mobile communications.

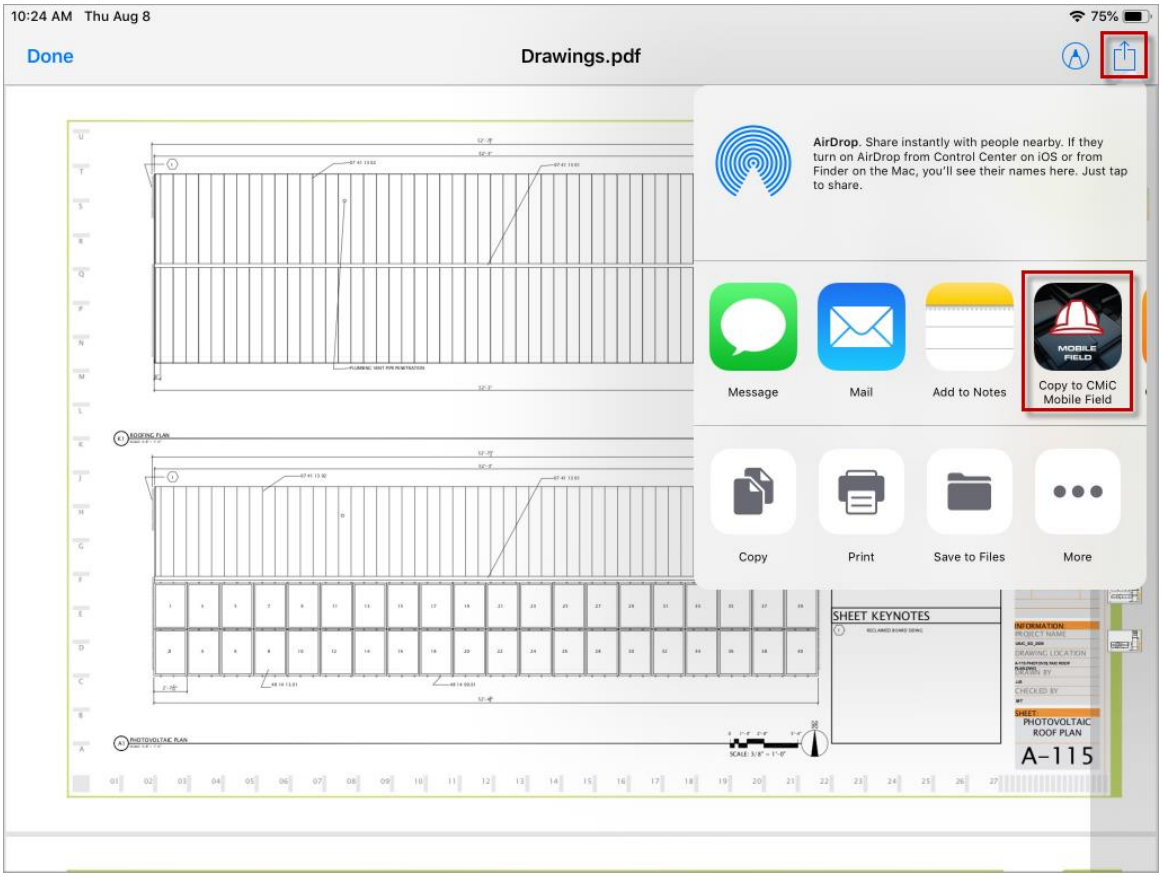
To import a PDF into Mobile Field, open the email with the PDF and tap it:



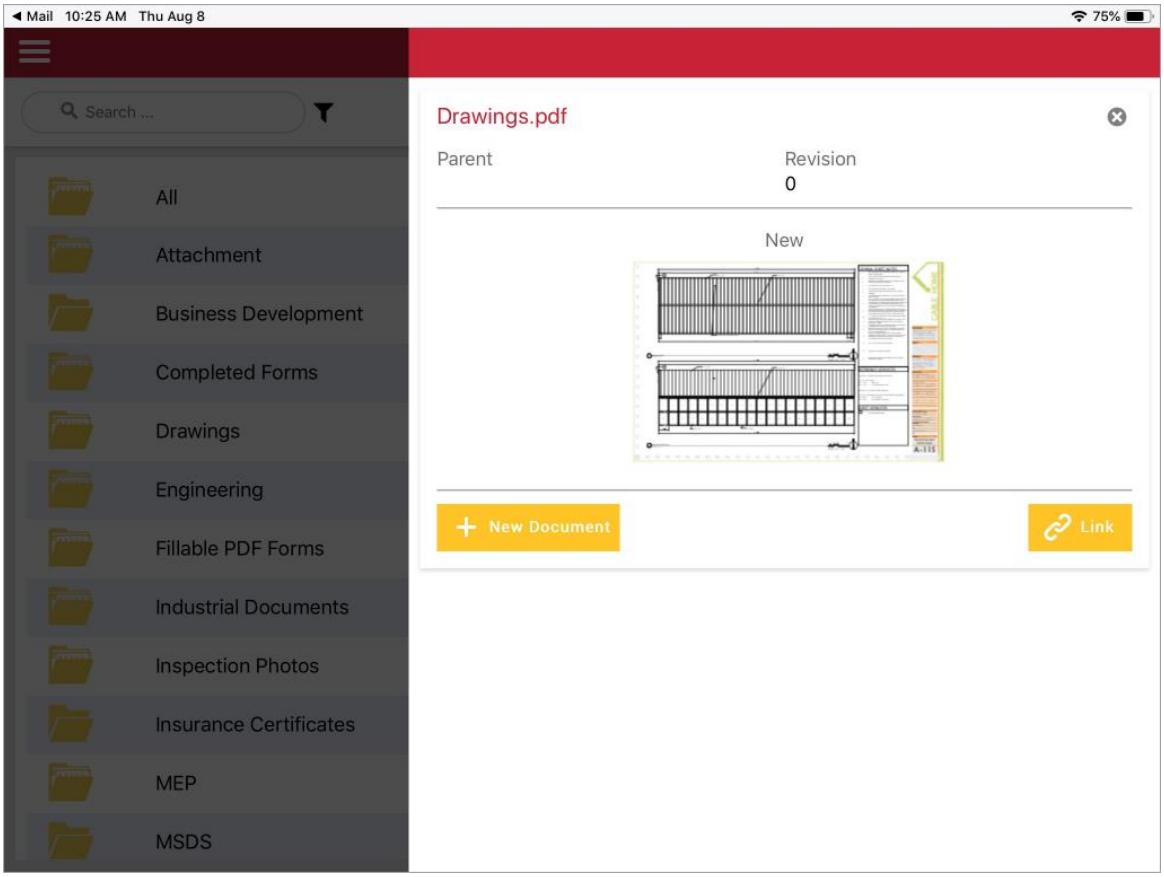
On the resulting screen, tap the Share icon:



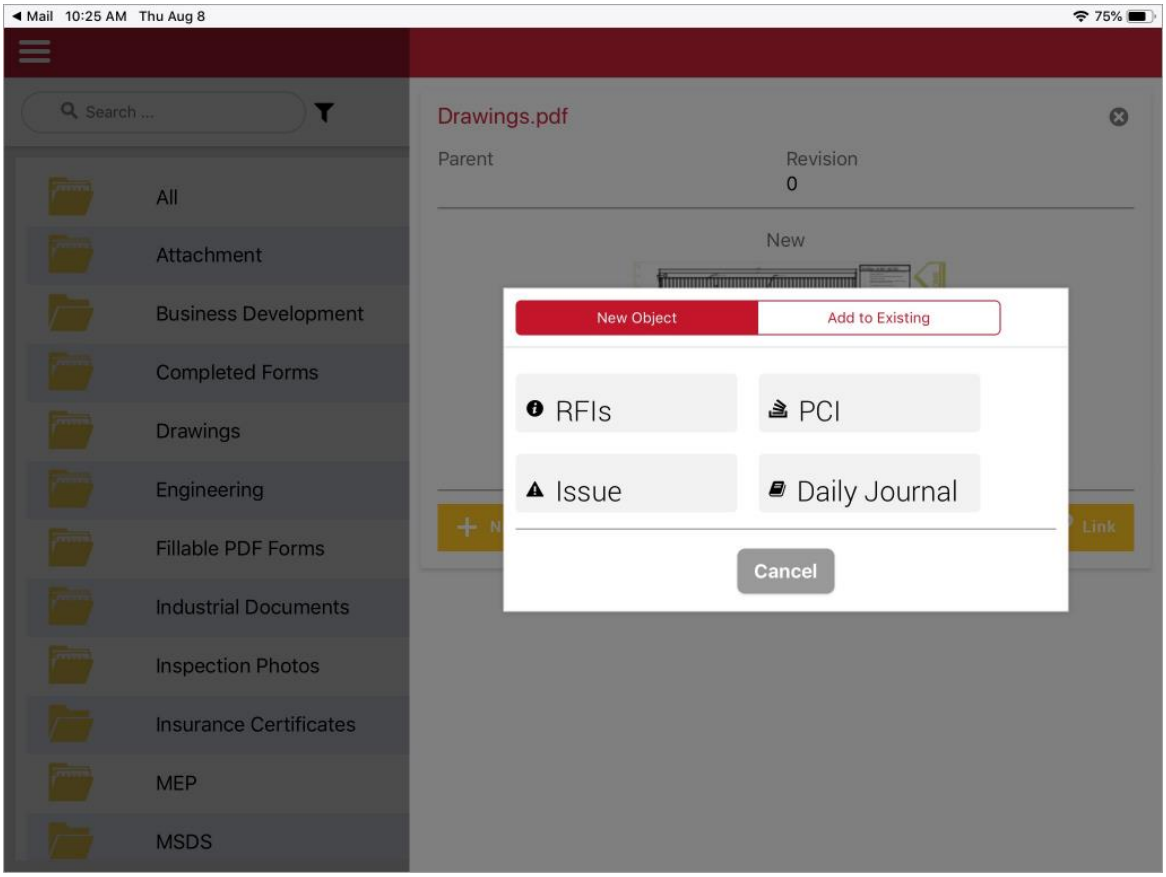
A number of options will be displayed, including, “Copy to CMiC Mobile Field”:



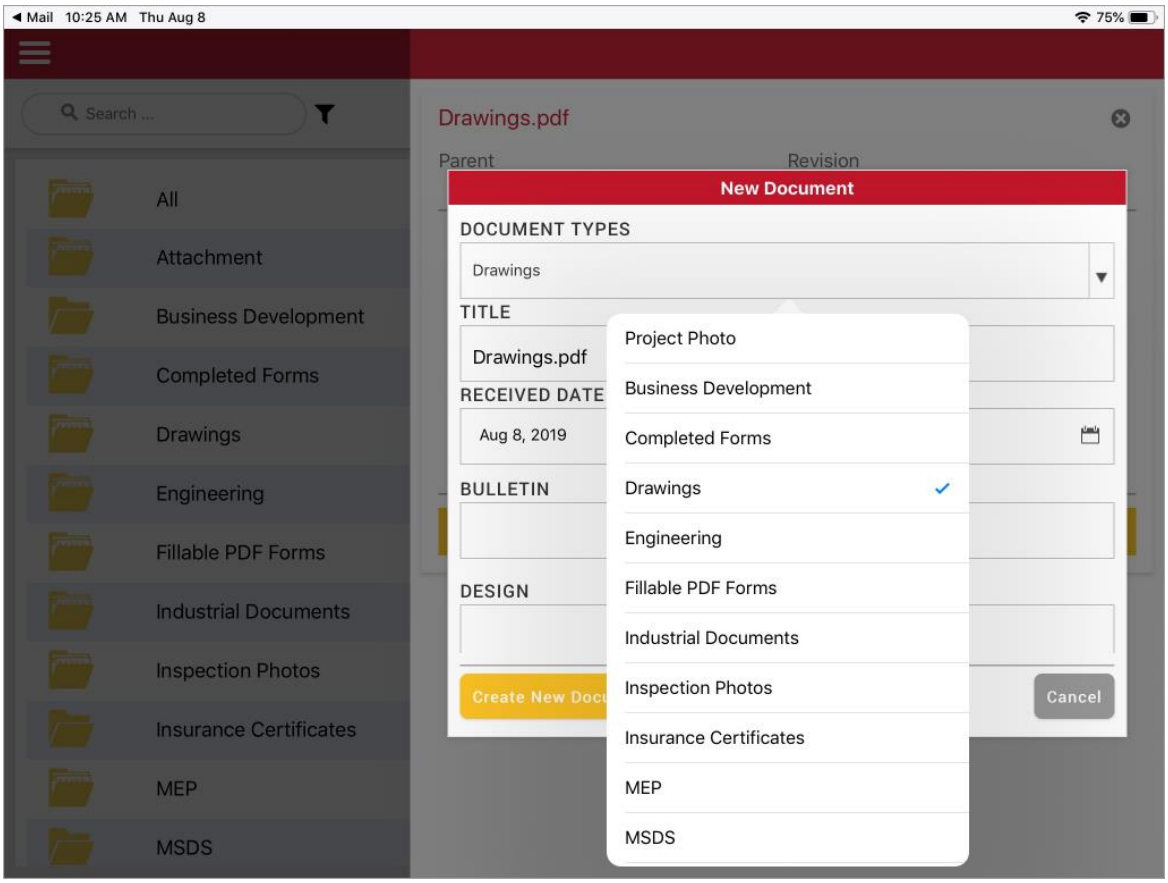
After tapping on the import button, the following screen is displayed:



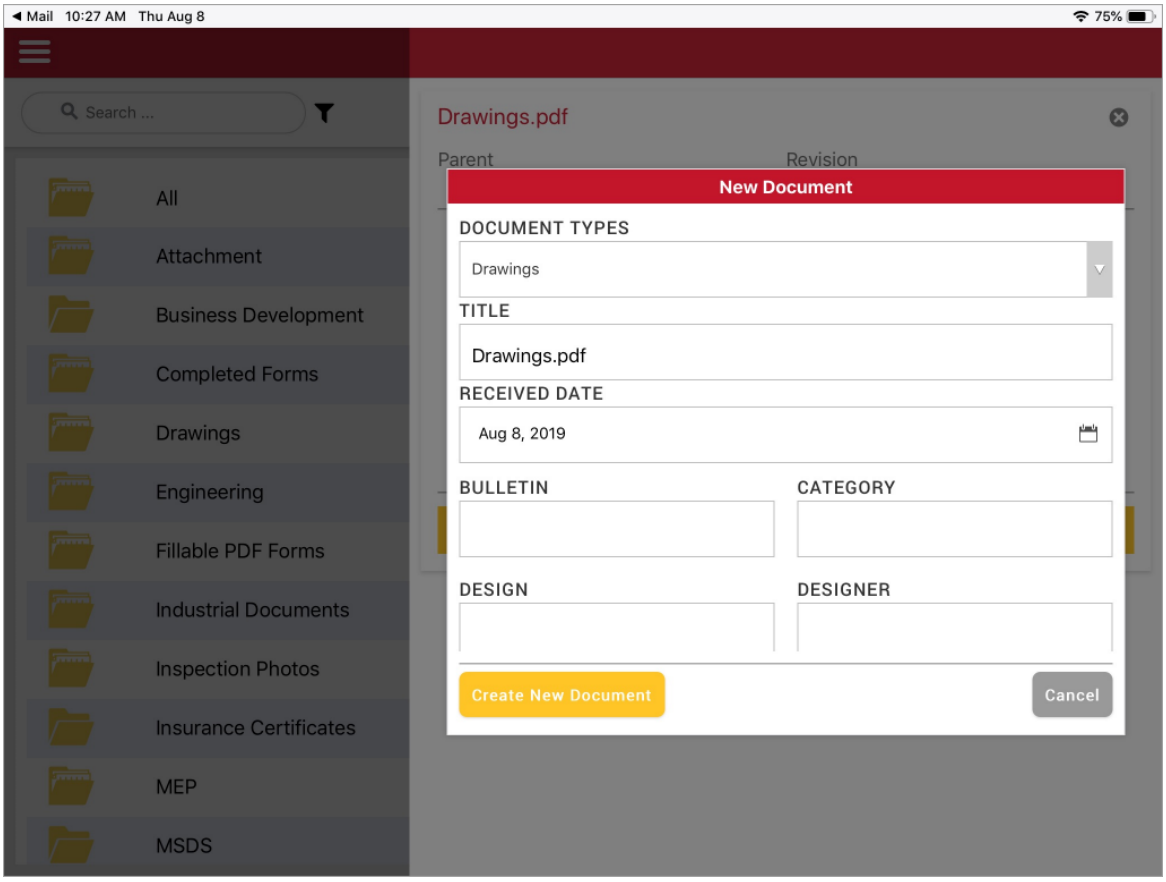
Tap [**Link**] to get the following options:



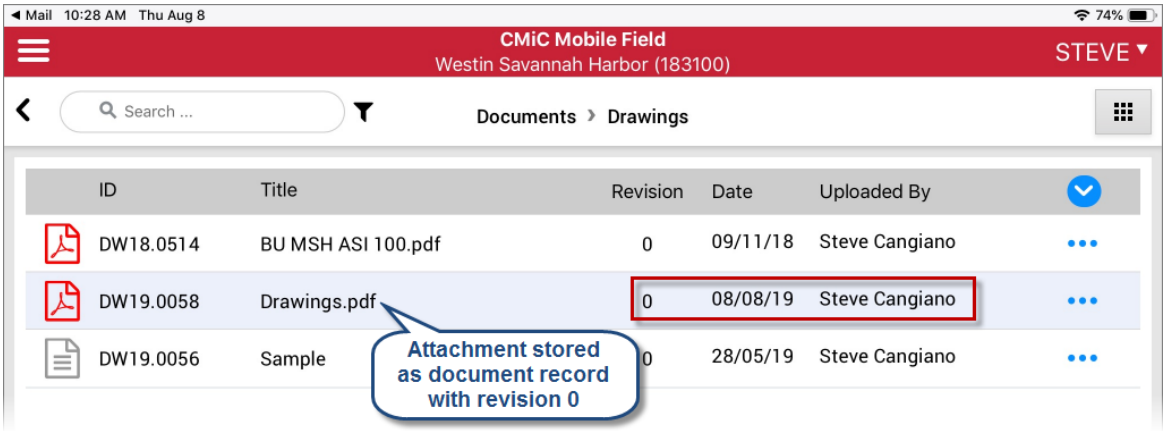
To save the attachment as a document record in Mobile Field, tap the **[+ New Document]** button and in the resulting pop-up window, select the document type and complete the remaining fields:



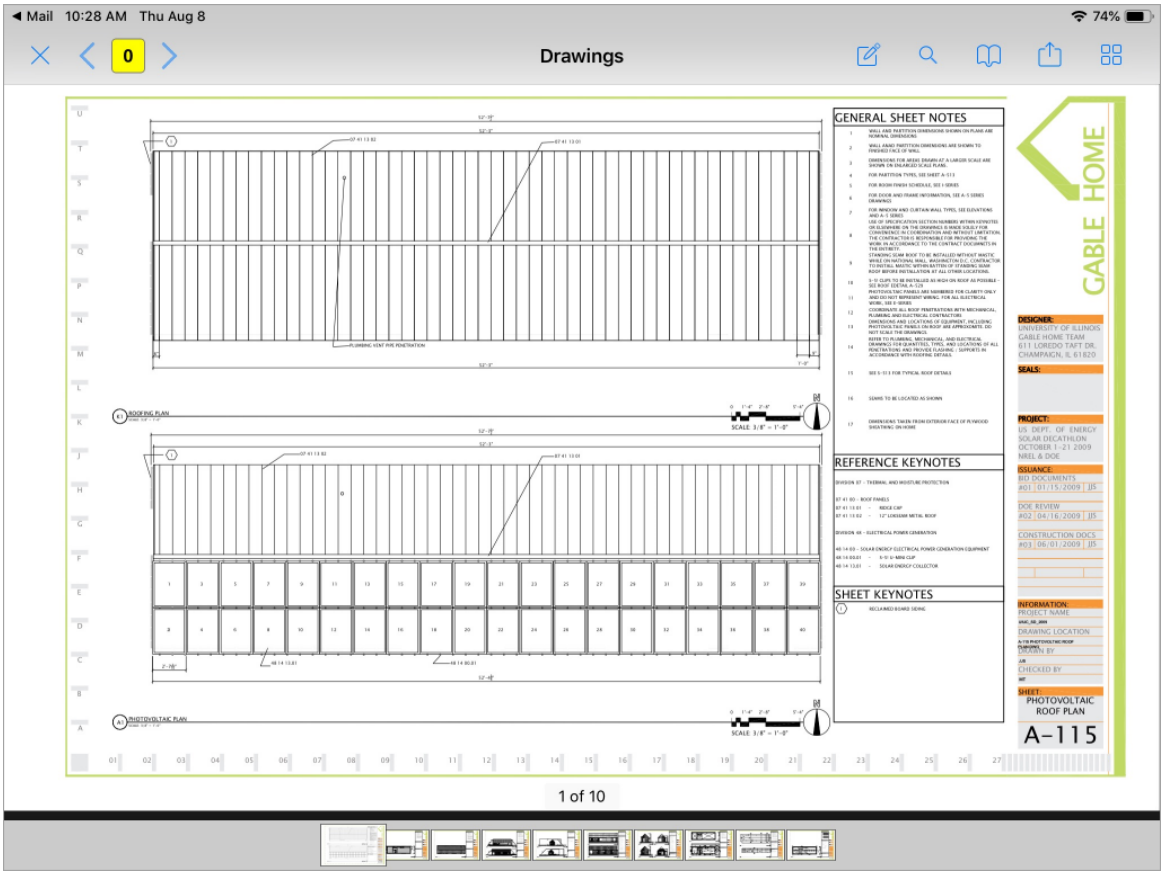
Tap [**Create New Document**]:



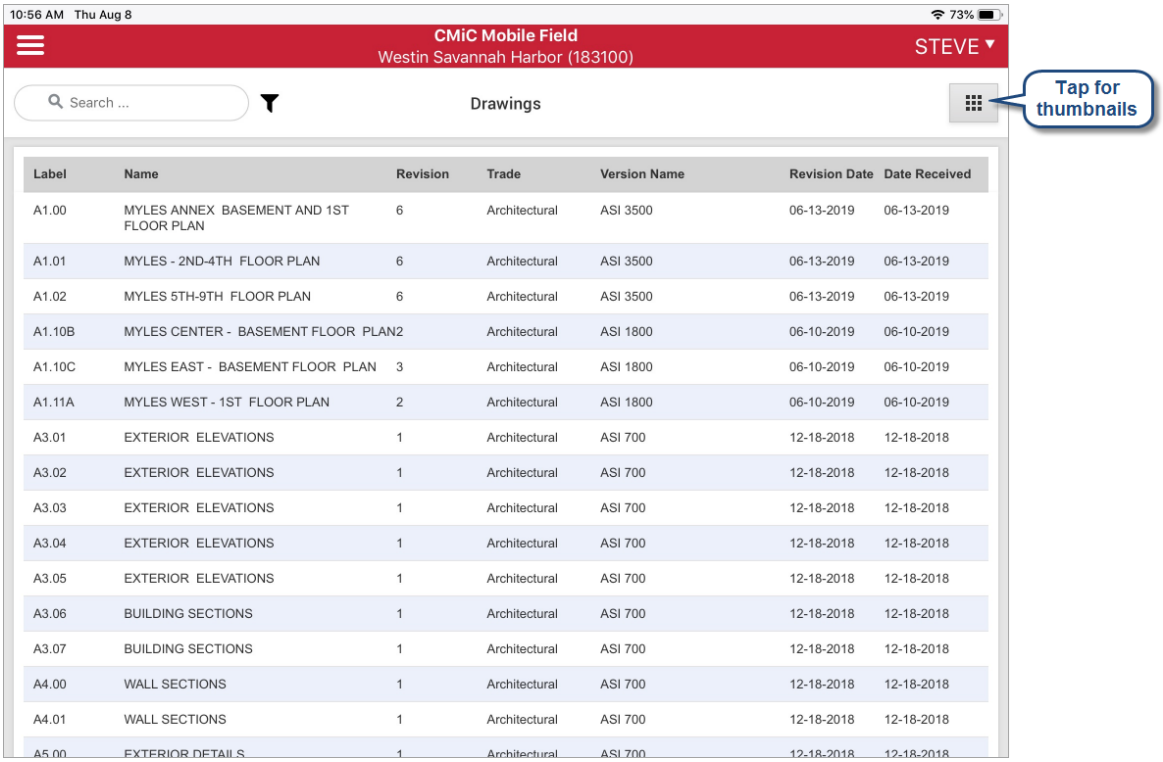
The document will be saved on the mobile device, and an entry for the document will be created in the Document screen:



Tap on the record to open it up and make any required mark-ups:



Drawings – Screen



Label	Name	Revision	Trade	Version Name	Revision Date	Date Received
A1.00	MYLES ANNEX BASEMENT AND 1ST FLOOR PLAN	6	Architectural	ASI 3500	06-13-2019	06-13-2019
A1.01	MYLES - 2ND-4TH FLOOR PLAN	6	Architectural	ASI 3500	06-13-2019	06-13-2019
A1.02	MYLES 5TH-9TH FLOOR PLAN	6	Architectural	ASI 3500	06-13-2019	06-13-2019
A1.10B	MYLES CENTER - BASEMENT FLOOR PLAN	2	Architectural	ASI 1800	06-10-2019	06-10-2019
A1.10C	MYLES EAST - BASEMENT FLOOR PLAN	3	Architectural	ASI 1800	06-10-2019	06-10-2019
A1.11A	MYLES WEST - 1ST FLOOR PLAN	2	Architectural	ASI 1800	06-10-2019	06-10-2019
A3.01	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A3.02	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A3.03	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A3.04	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A3.05	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A3.06	BUILDING SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A3.07	BUILDING SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A4.00	WALL SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A4.01	WALL SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
A5.00	EXTERIOR DETAILS	1	Architectural	ASI 700	12-18-2018	12-18-2018

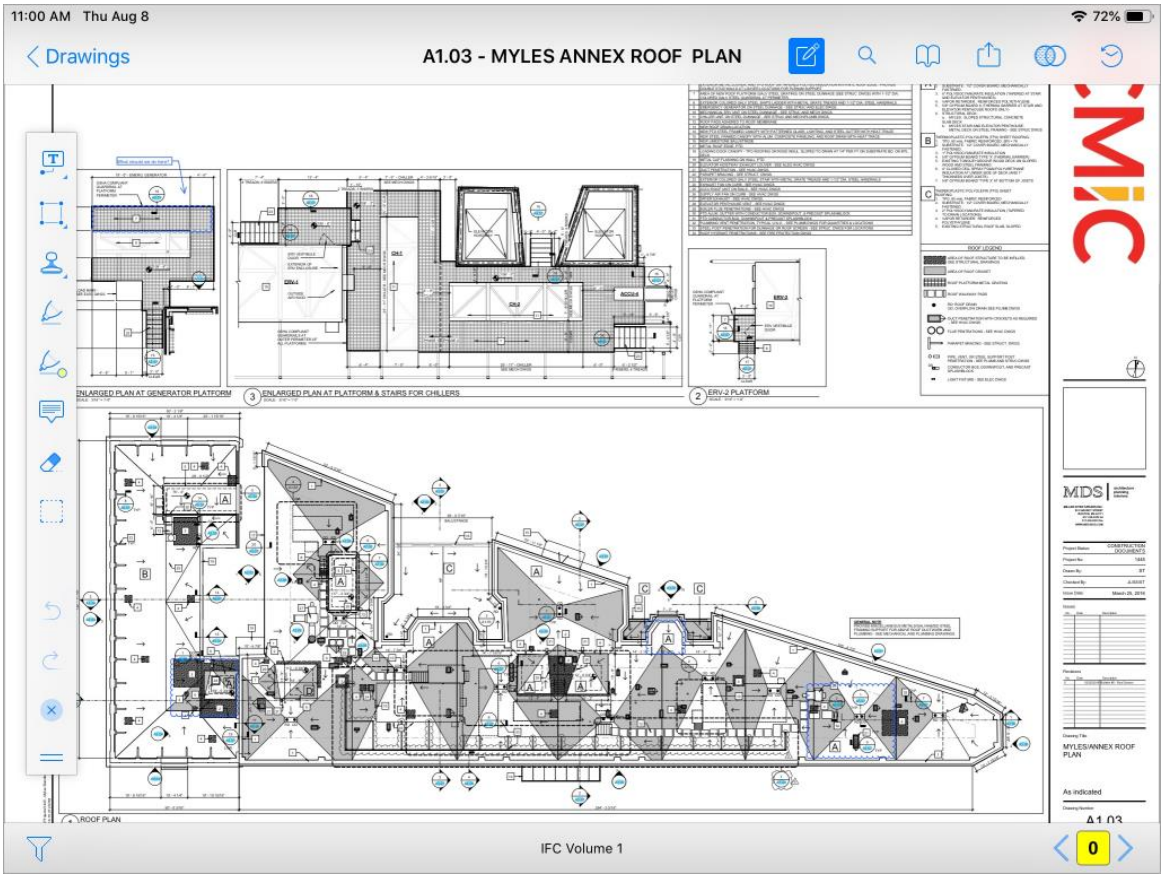
This screen is used to access drawing set sheets (project drawings), which are made available in Mobile Field by the Mobile Drawing Management feature.

Once the drawing set for a project has been uploaded into CMiC Field's Document Management module via ECM Explorer, the drawing set can be accessed via this screen, as shown above.

Selecting a sheet opens it using the CMiC Mobile Viewer, which can be used to view, add, edit, and delete annotations, and to link the sheet to an RFI or issue.

For details about setting up Mobile Drawing Management, please refer to the *Mobile Drawing Management* section in the *CMiC Field* reference guide.

Overview – Mobile Drawing Management



Sample of Drawing Set Sheet in Mobile Field

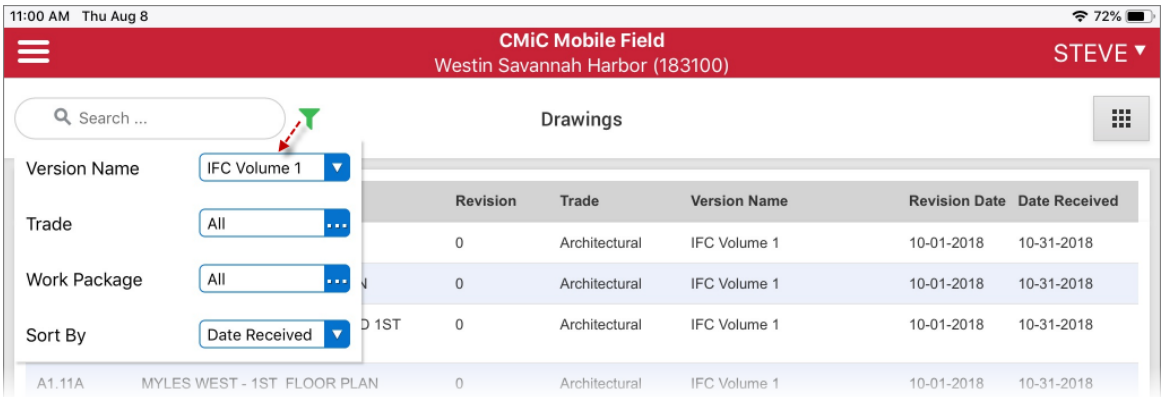
Effective communication between project key players, stake holders, and subcontractors is vital for the timely identification and resolution of issues, and to minimize costly misunderstandings so that projects stay on schedule and on budget. To better understand and illustrate communications, specifically for those out in the field where construction is done, project members need to remotely view, mark up, and include drawing plans in communications.

Mobile Drawing Management has been designed by CMiC, in conjunction with our clients, to greatly increase the effectiveness of mobile communications involving PCIs, RFIs, issues, and bid packages by:

- Automatically splitting large, multipage PDF drawing plans from architects/engineers to create a drawing set of one PDF per sheet so that only relevant sheets need to be included in mobile communications.
    - For each sheet in created drawing set, its sheet label, sheet title, and drawing type (e.g., architectural, electrical, mechanical, etc.) is automatically extracted using optical character recognition (OCR) functionality to allow linking between the sheets.
    - All sheet labels in call-outs and text are converted to hyperlinks to greatly facilitate navigation between sheets in the drawing set.
- Providing smart upload/download logic by storing mark-ups on separate layers from drawings so that:
    - Drawing sets only need to be downloaded to mobile devices in full once.
    - Only mark-up changes need to be sent and received, greatly speeding up mobile communications.

- Removing operational overhead required to manage and use drawing plans in one system and other document types in a different system.

Search & Filters



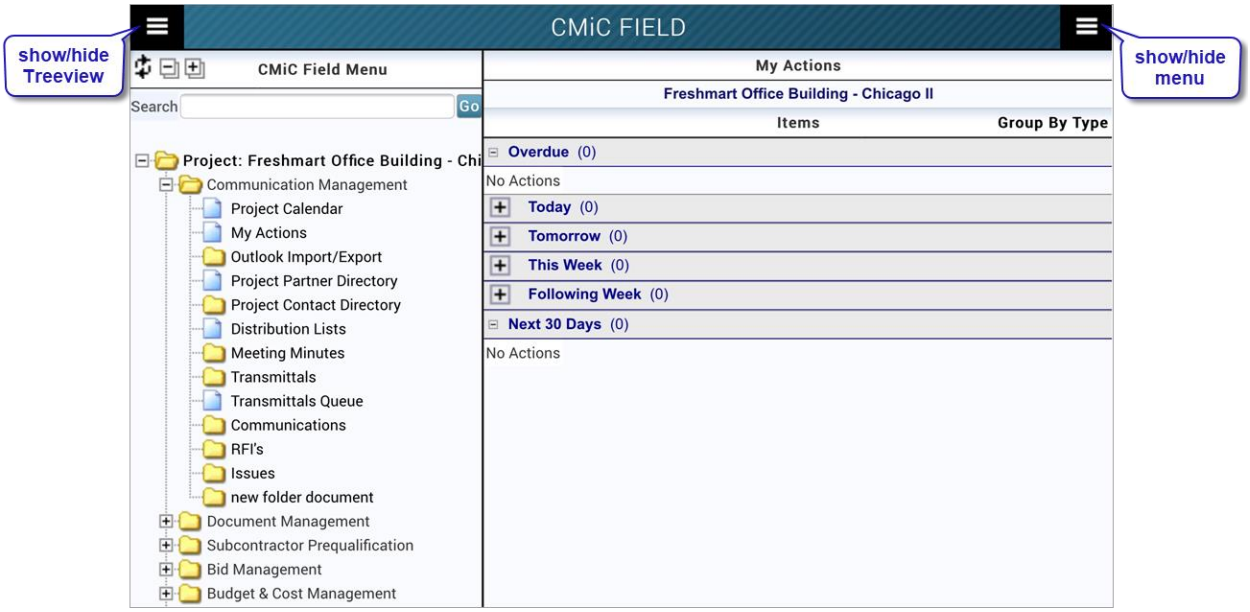
To search for a drawing set sheet among those listed, tap the Search field, enter text to search against, and tap the device's Return keyboard key. All matched sheets will be listed. Use the ⊗ within the Search field to clear the search results and return to the full list of drawing set sheets.

To filter the listed sheets, tap the Filter icon to display the available filter parameters for sheets, as shown above. When the filter is active, the icon's color changes to green.

The filter's Version Name and Trade fields can be used to filter sheets by their associated version name (as entered via ECM) and trade, and the Sort By field can be used to select how the filtered results are to be sorted.

NOTE: If the filter is in use, the Search field can be used to search the list of filtered sheets.

CMiC Field – Browser

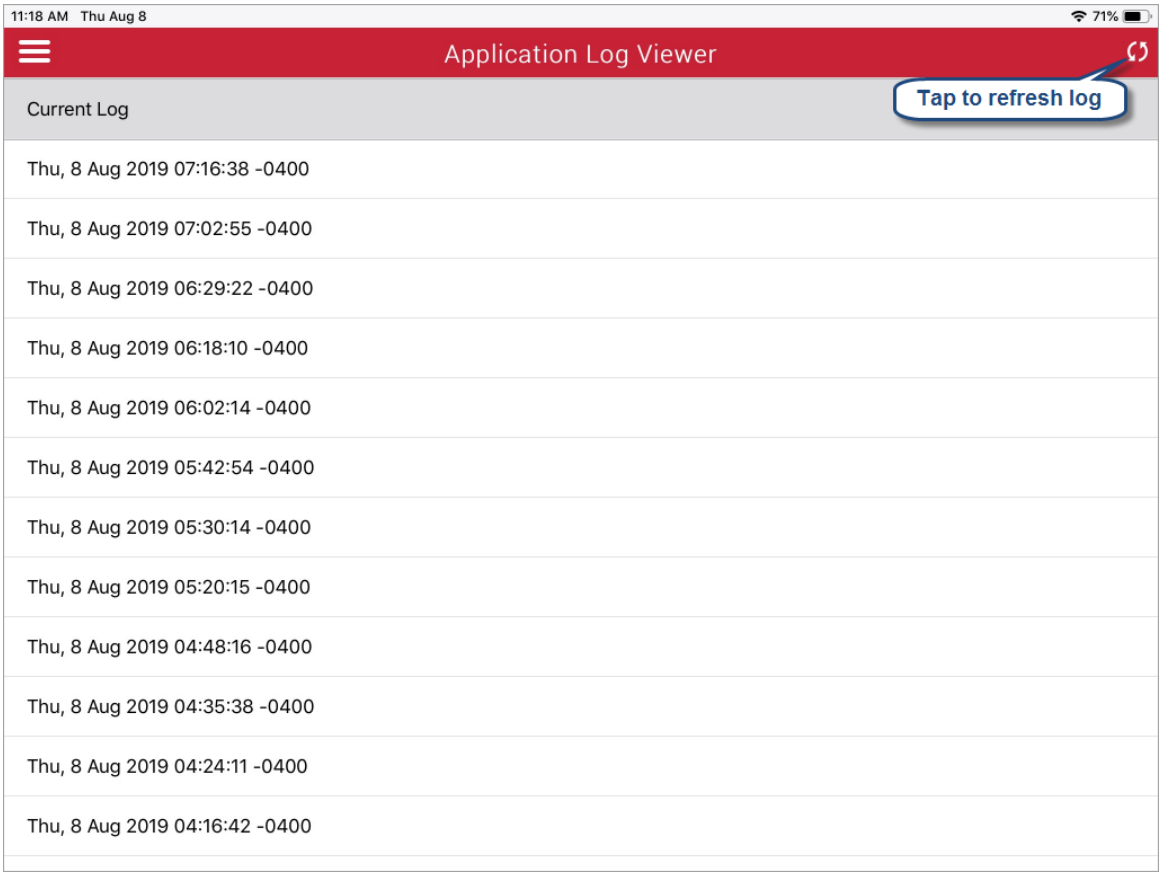


Tap the

icon to launch a web browser to run the CMiC Field application.

Due to the limitations of mobile devices, particularly screen sizes, not all functionality will be feasible.

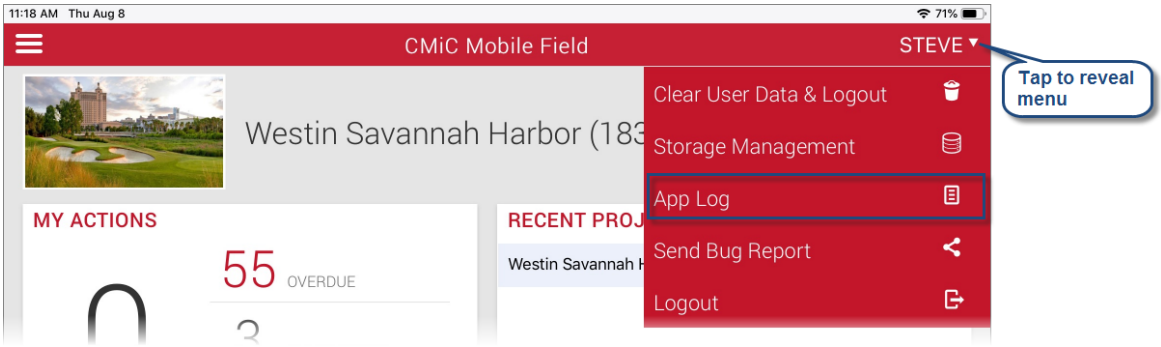
Application Logs – Screen



This screen lists entries that were created during the running of Mobile Field. These entries contain information about executed operations that can be useful if an issue needs to be reported to CMiC. To view an entry's detail, tap it.

Launch Application Log

To launch the Application Log screen, tap the user ID drop-down menu, shown below, then tap the "App Log" option.



Settings for Log's Detail

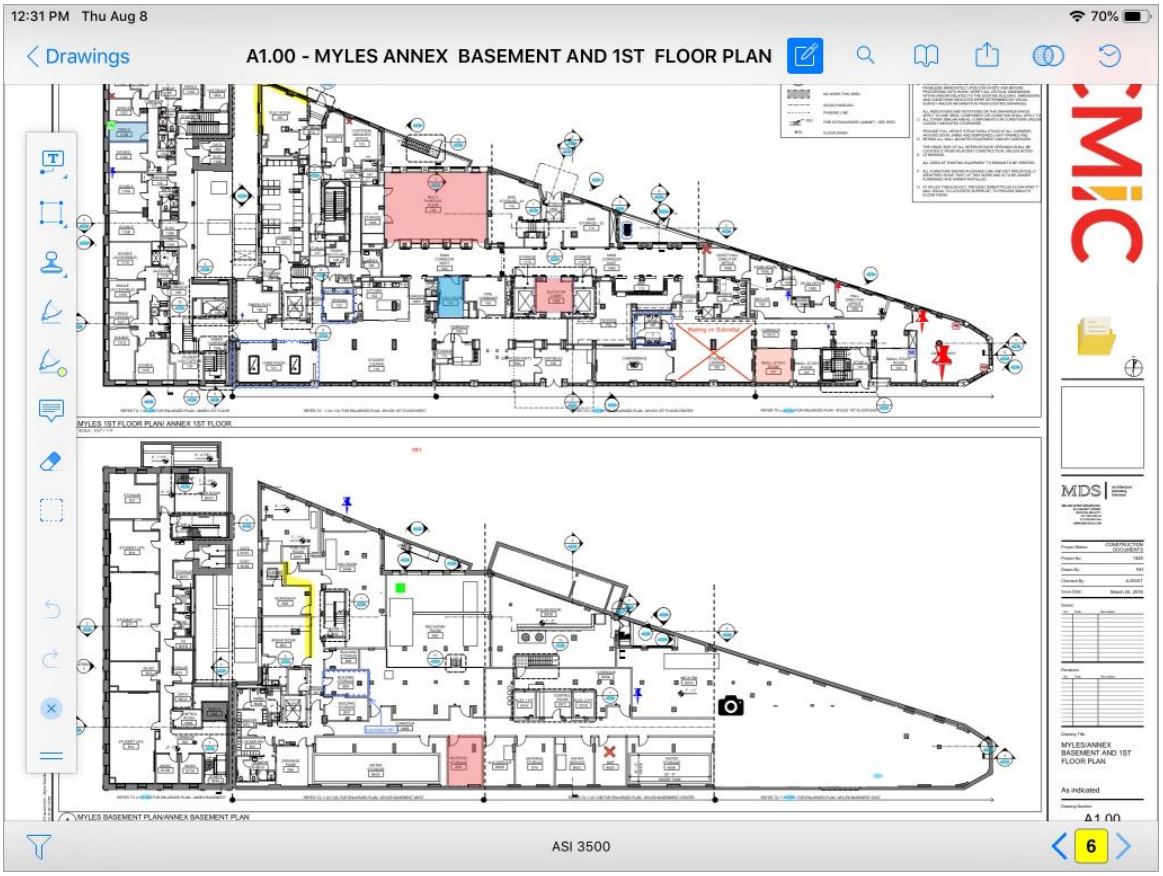
For details about setting this log's level of detail, please refer to the *Application Logging Level* subsection, under the *App's Settings – iPad* section of this guide.

CMiC Mobile Viewer

PDF documents can be downloaded to the device from CMiC Field's Document Management module, annotations (e.g. markups) can be added to them using the CMiC Mobile Viewer, and they can be attached to PM objects.

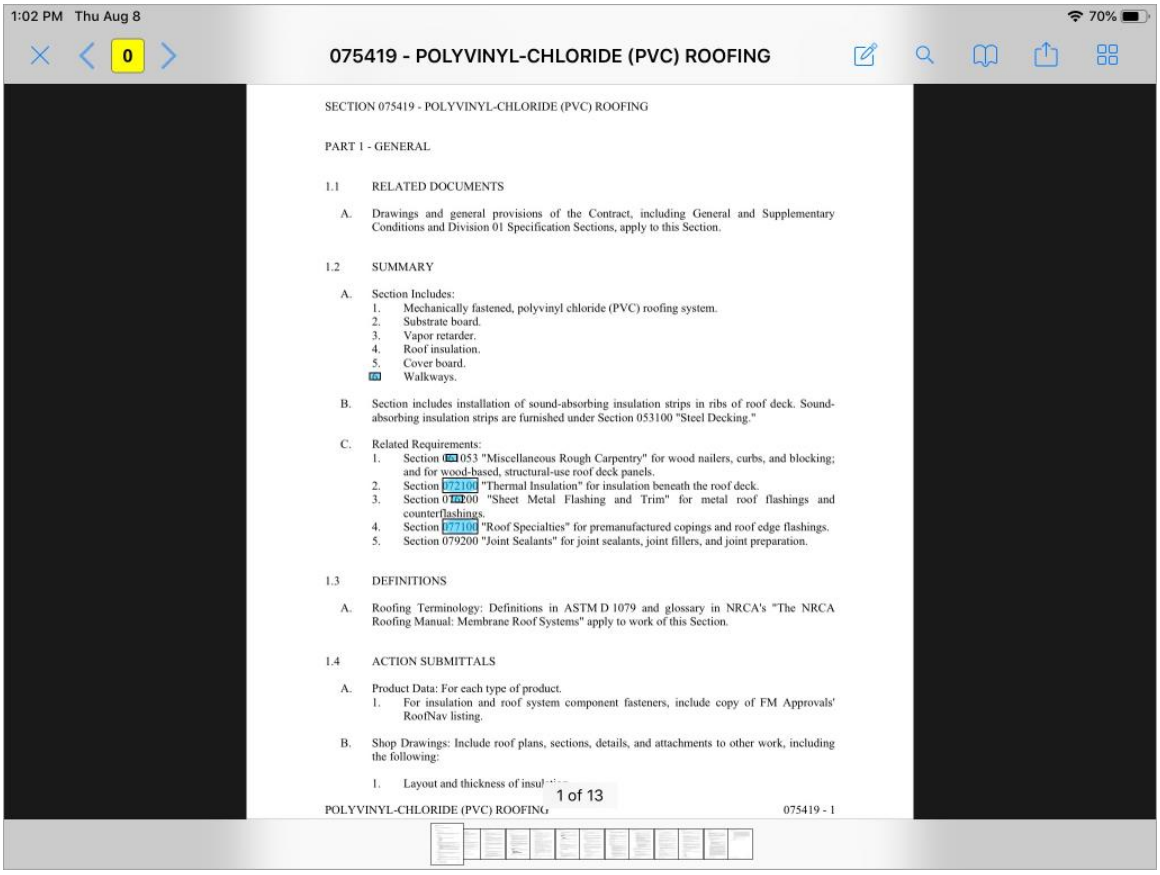
NOTE: PDFs attached to emails can be imported into Mobile Field to be marked up in this viewer, as per the following section: *Importing PDFs from Emails into Mobile Field*.

If a PDF is a drawing set sheet, it can be assessed in the Drawings screen, or from the PM object to which it was attached:



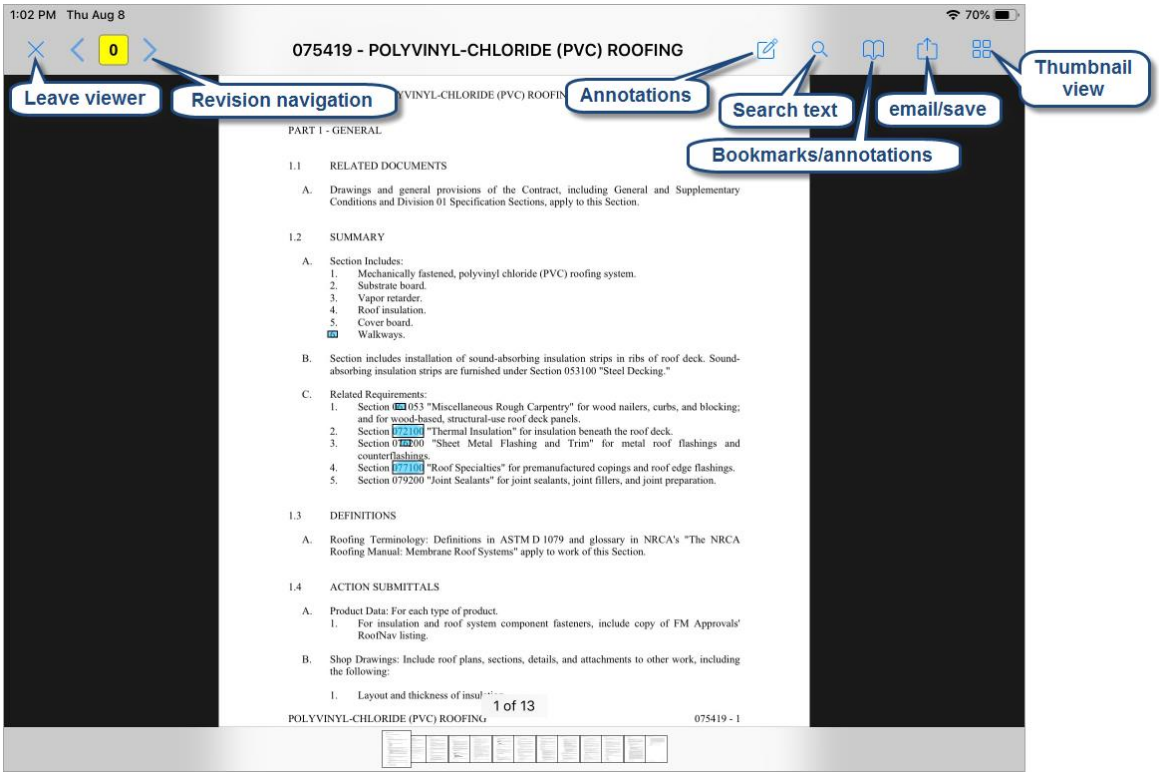
Sample of PDF that is a drawing set sheet, with annotations to illustrate communications

If a PDF is anything other than a drawing set sheet, it can be assessed in the Documents screen, or from the PM object to which it was attached:



Sample of a regular PDF (not a drawing set sheet) with annotations to illustrate communications

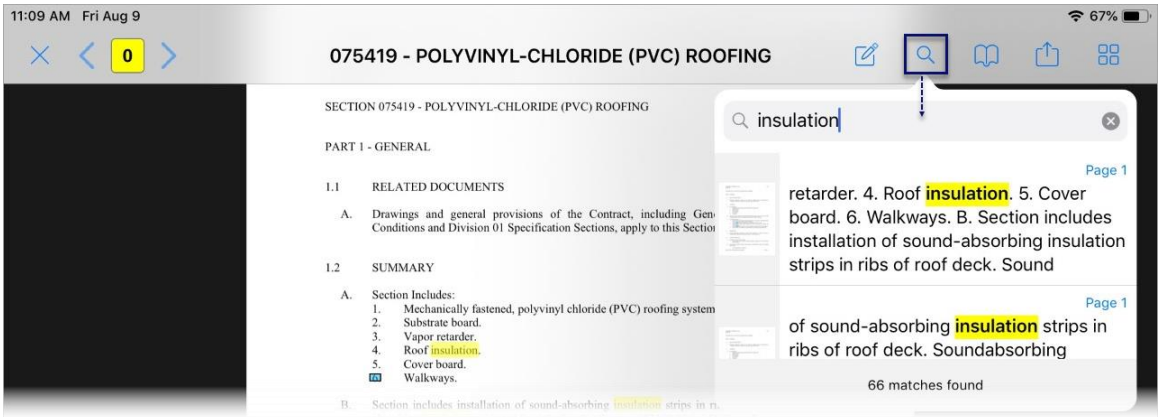
Main Controls



Annotations

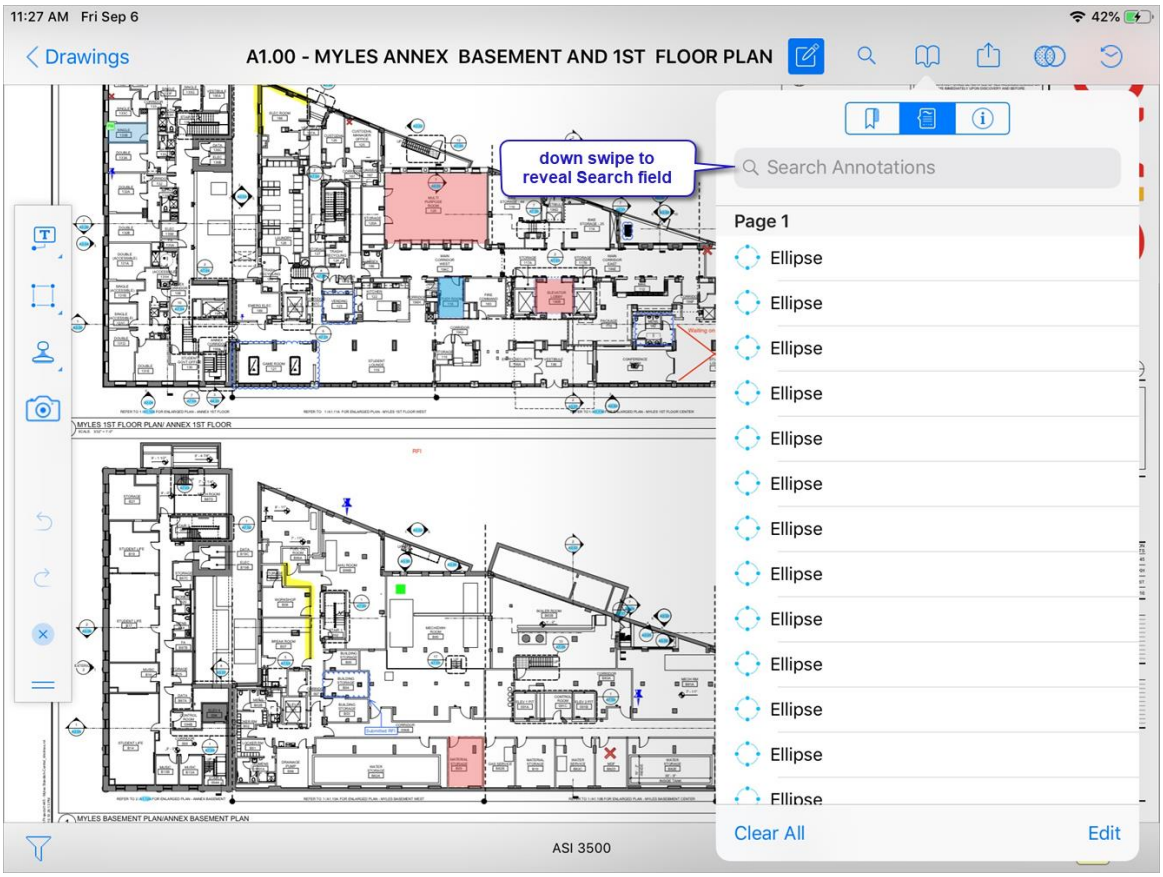
This option is used to add annotations to the PDF, as per the following *Using Annotations* section in this guide.

Search



This option is used to search for text in the loaded PDF. All found instances will be highlighted.

Bookmarks/Annotations



The Bookmarks/Annotations icon shows a summary of the annotations that have been made in the current revision, including hyperlinks to other drawing set sheets.

- Tap a listed annotation to navigate to it.
- To reveal the Search field, down swipe on the list.

NOTE: The Search field is only available for the Annotations icon.

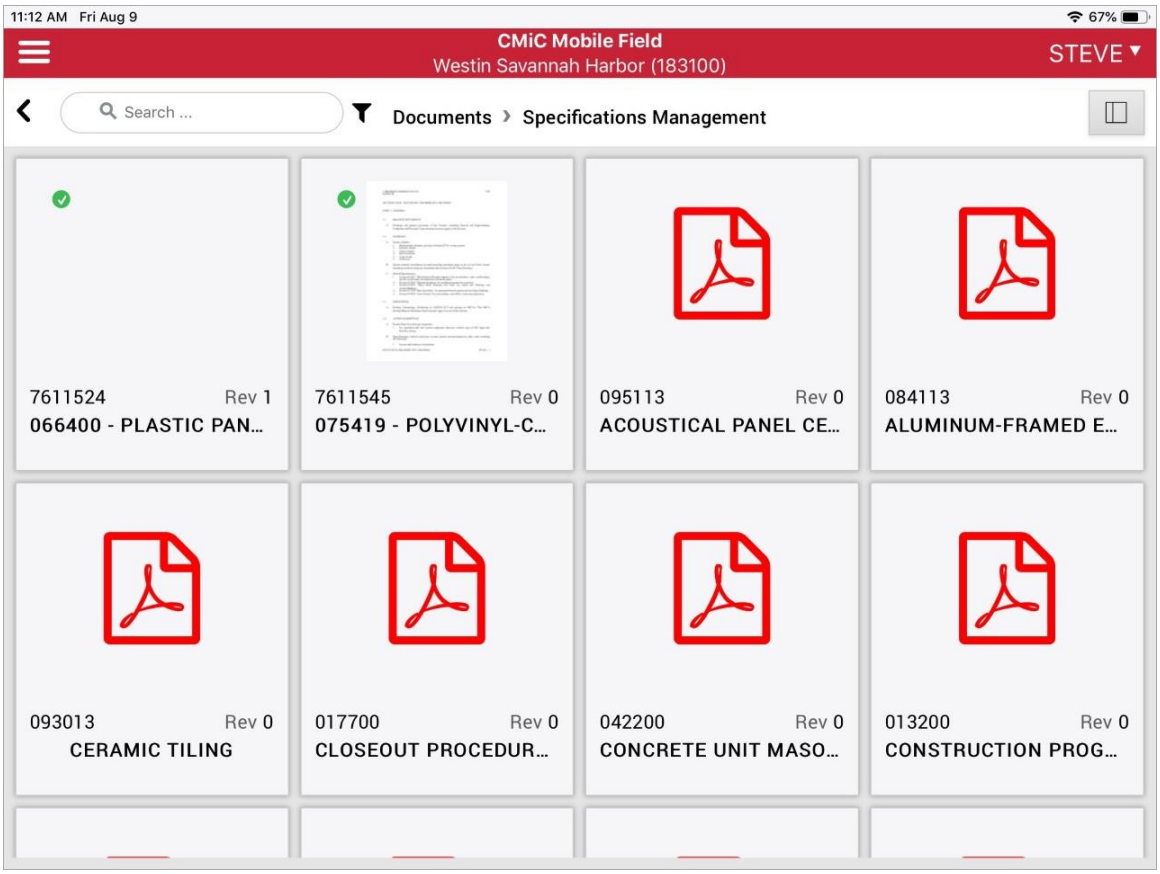
- To delete an annotation from the list and sheet, left swipe it to reveal the [**Delete**] button; and to delete all annotations from the list and sheet, tap the Clear All option on the bottom-right corner.

Share (Email…)

Provides the ability to email a PDF, and other standard iPad options for documents.

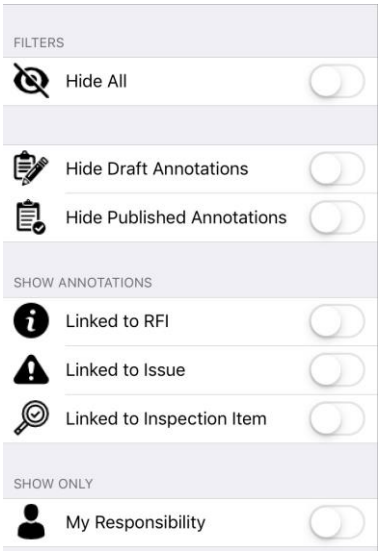
Thumbnails

This option is useful for documents with a large number of pages, making it easier to find a particular page:



Filter Annotations

This option, located on the bottom-left corner of the viewer, is used to hide or show annotations:



NOTE: Filtering annotations is only available when viewing drawings.

Gestures: Navigation & Zooming

Navigating Between Pages

Swipe left to navigate to the next page, and swipe right to navigate to the previous page.

Navigating Between Revisions

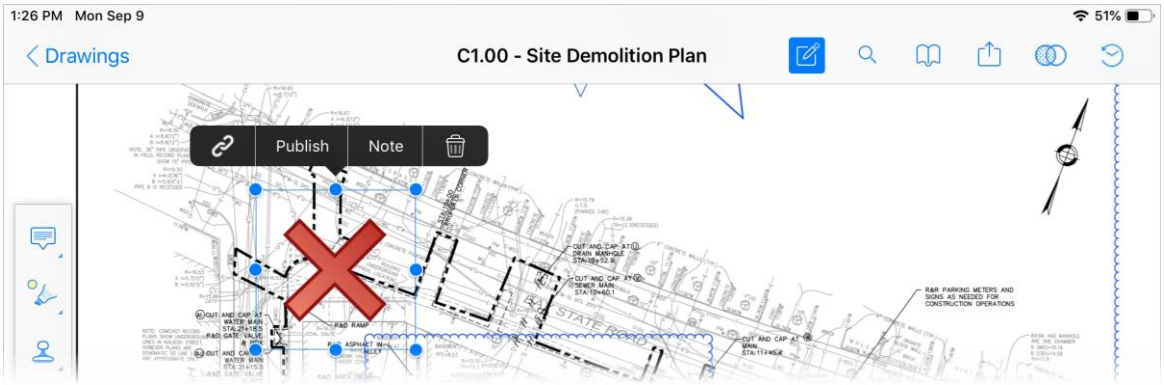
Swipe up to navigate to a newer revision, and swipe down to navigate to an older revision.

Zooming

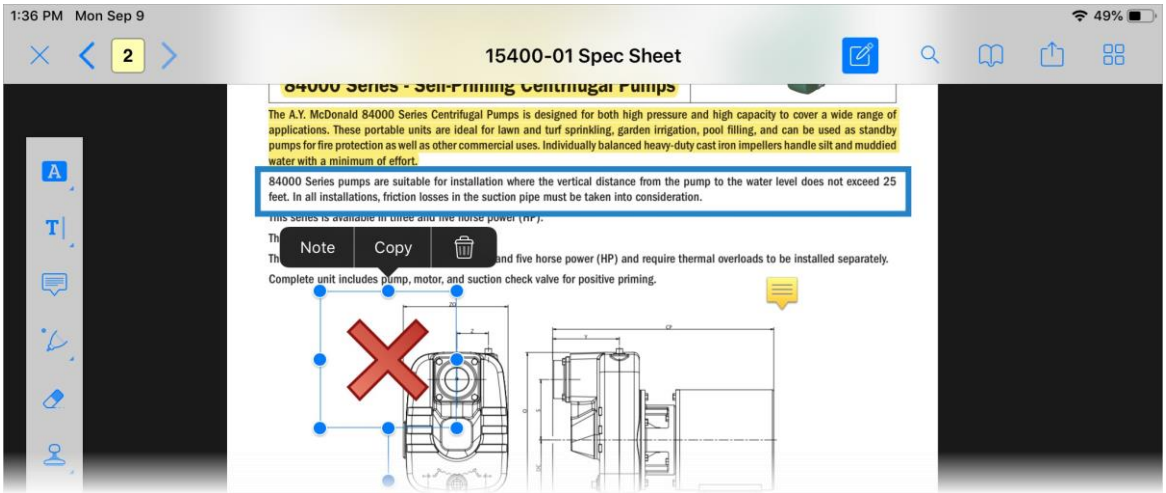
Touch the screen with two fingers and move them together to zoom in or move them apart to zoom out.

Using Annotations

Annotations Context Menu



Sample of annotations used in Drawings

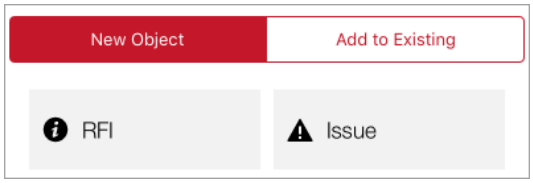


Sample of annotations used in Documents

As shown in the screenshots above, when an annotation is selected, the following options are available.

NOTE: The [**Link**] and [**Publish**] buttons will only appear for annotations in the Drawings screen and the [**Copy**] button will only appear for annotations in the Documents screen.

Link Annotation to RFI or Issue



Link selected annotation to a new or existing RFI or Issue.

Publish

Publish the selected annotation.

NOTE: PM role security privileges are required for this option, as per the *CMiC Field – PM Role Setup* section in the *CMiC Field* guide.

Note

Add note to the selected annotation.

Copy

Copy selected annotation. After tapping this option, long-press where to paste the copy.

Delete

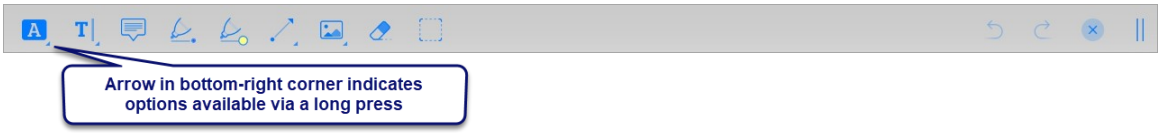
Delete the selected annotation.

Publishing Annotations

To make an annotation visible to everyone, it must be published. To do so, select an annotation to bring up the Annotations Context Menu and tap [**Publish**].

NOTE: PM role security privileges are required for this option, as per the *CMiC Field – PM Role Setup* section in the *CMiC Field* guide.

Annotation Toolbar



Tap the Annotations icon along the top-right of the screen to bring up the Annotations toolbar, shown above.

Text Highlighting

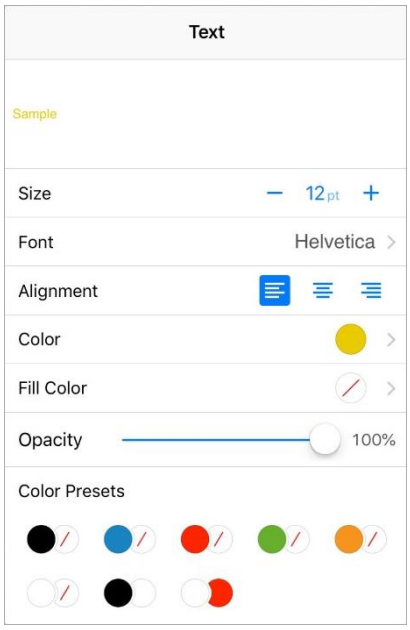
Long press this option to display the highlight, underline, and strikethrough text options. After selecting an option, select the relevant text with your finger.

The color and opacity for these options is set using the option on the Annotations toolbar:

Text Annotation

Long press this option to display the text annotation and signature options. The first option is for adding text, the second one is for adding text with an arrow, and the last option is for adding a signature. After selecting an option, tap the spot where the annotation is to be added.

The format, color, and opacity for the text is set using the option on the Annotations toolbar:



Note Annotation

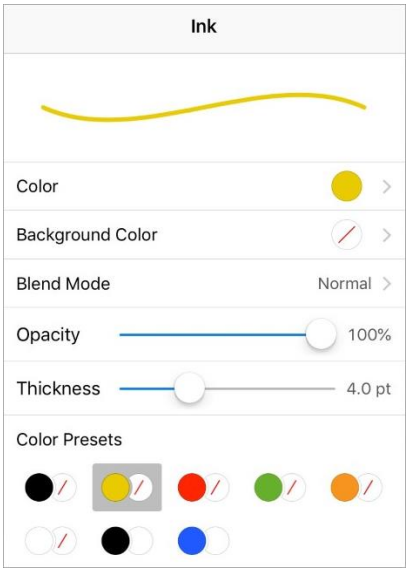
Used to add a note annotation. To do so, select this option, then tap where the note is to be added.

In the pop-up window for the note, tap the Edit icon, shown below, to change the shape and color of the note:

Freehand Drawing

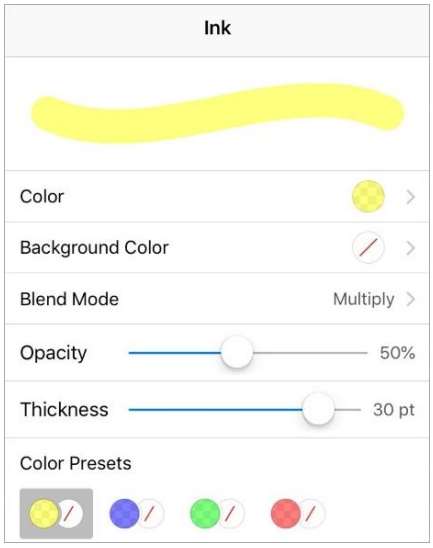
Used to draw anywhere on a document.

The color, opacity, and thickness for the line is set using the option on the Annotations toolbar:



Freehand Highlighting

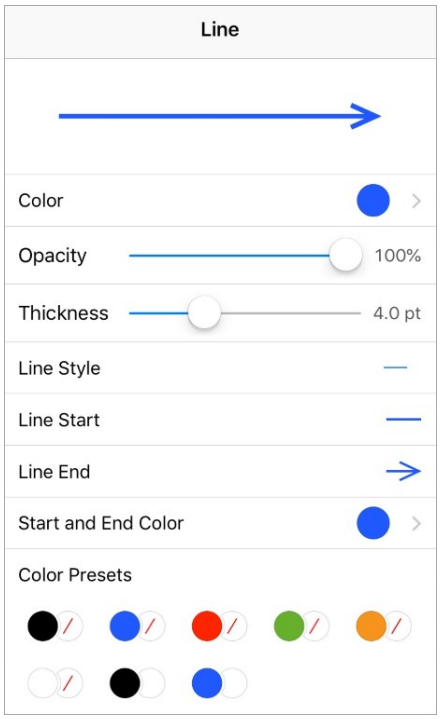
Used to freehand highlight anything on a document.
The color, opacity, and thickness for the highlight is set using the option on the Annotations toolbar:



Arrow, Lines & Shapes

Long press this option to added arrows, lines, or shapes on a document.

The color, opacity, line thickness, line style, and other properties for this annotation type are set using the option on the Annotations toolbar:



Image, Stamps, Saved Annotations, & Audio

Long press this option to add images from the camera or photo log, add stamps, add saved annotations, or to add an audio file.

Eraser

Used to erase any marks made using the Freehand Draw and Freehand Highlight options.

Select Annotations

Used to select one or more annotations. Once selected, they can be grouped, copied, saved, deleted, or moved together.

Undo/Redo

Used to undo and redo changes.

Hide Toolbar

Used to hide the toolbar.

Move Toolbar

Used to move the toolbar. Touch-and-hold this option to move the toolbar to either of the sides or to the top of the screen.

Revisions

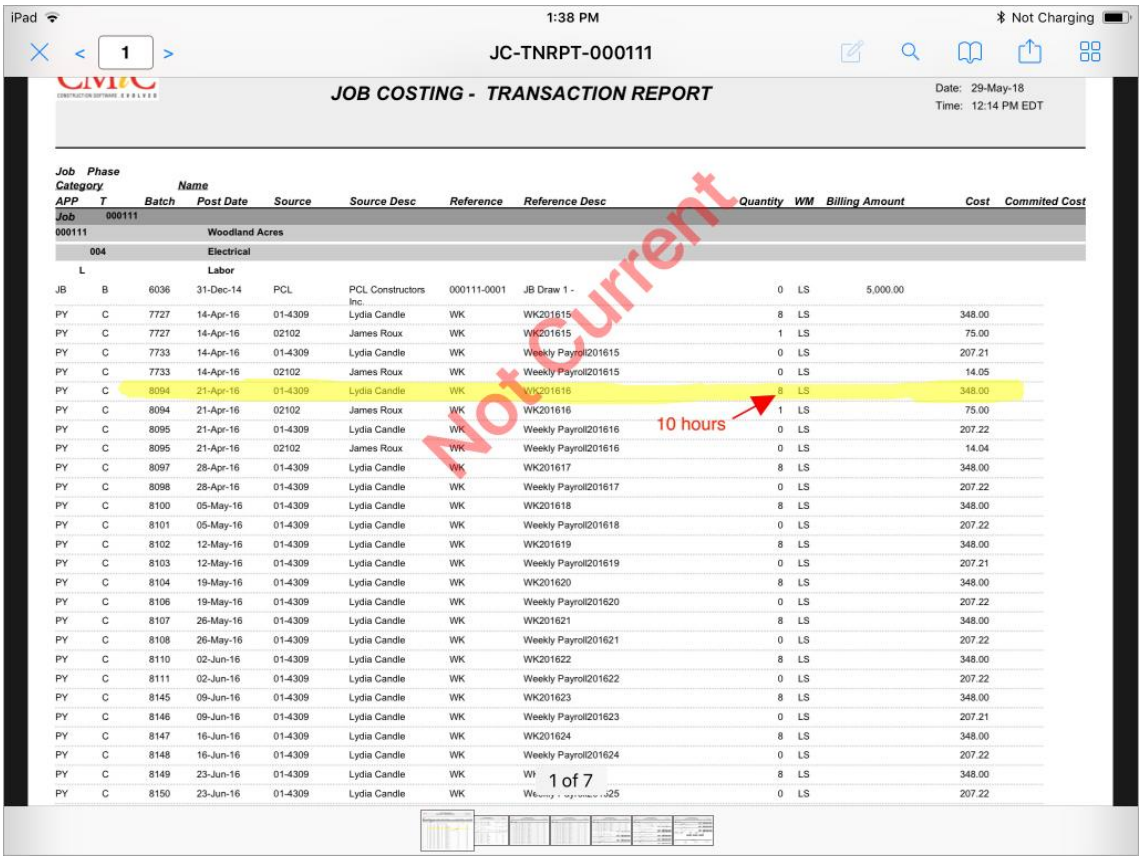
Revision Navigator for drawing set sheets

The Revision Navigator shows which revision is currently displayed, and its left and right arrows are used to switch between the revisions. For drawing set PDFs, the Revision Navigator is on the bottom-right corner of the viewer, and for all other PDFs, the Revision Navigator is on the top-right corner of the screen.

If the Revision control is yellow, as shown above, it indicates that the current revision is being displayed.

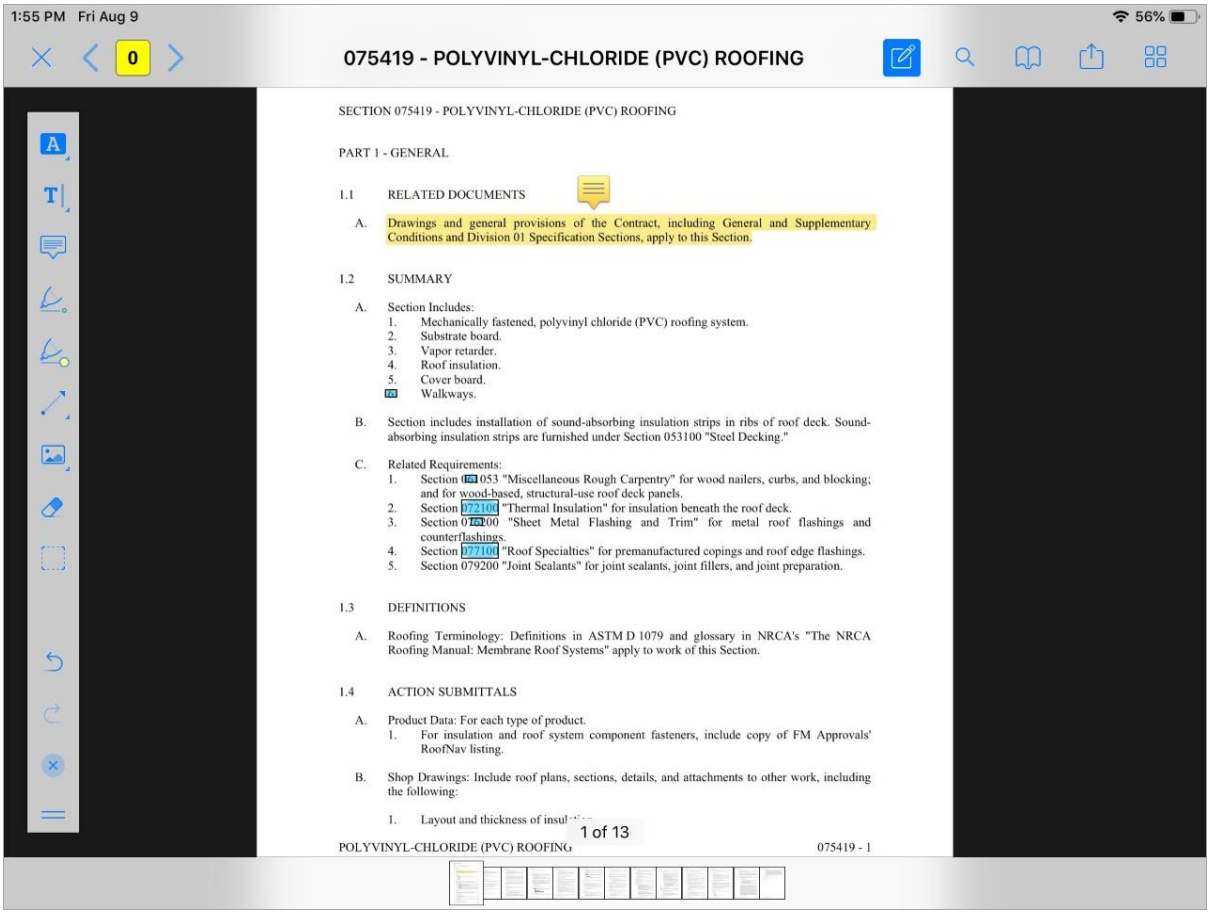
NOTE: Only the current revision can be marked up.

If the displayed PDF is not current, as tracked by CMiC Field's Document Management module, it will have a red "Not Current" watermark, as shown below. Also, the displayed revision number will be white, indicating that it is not current.

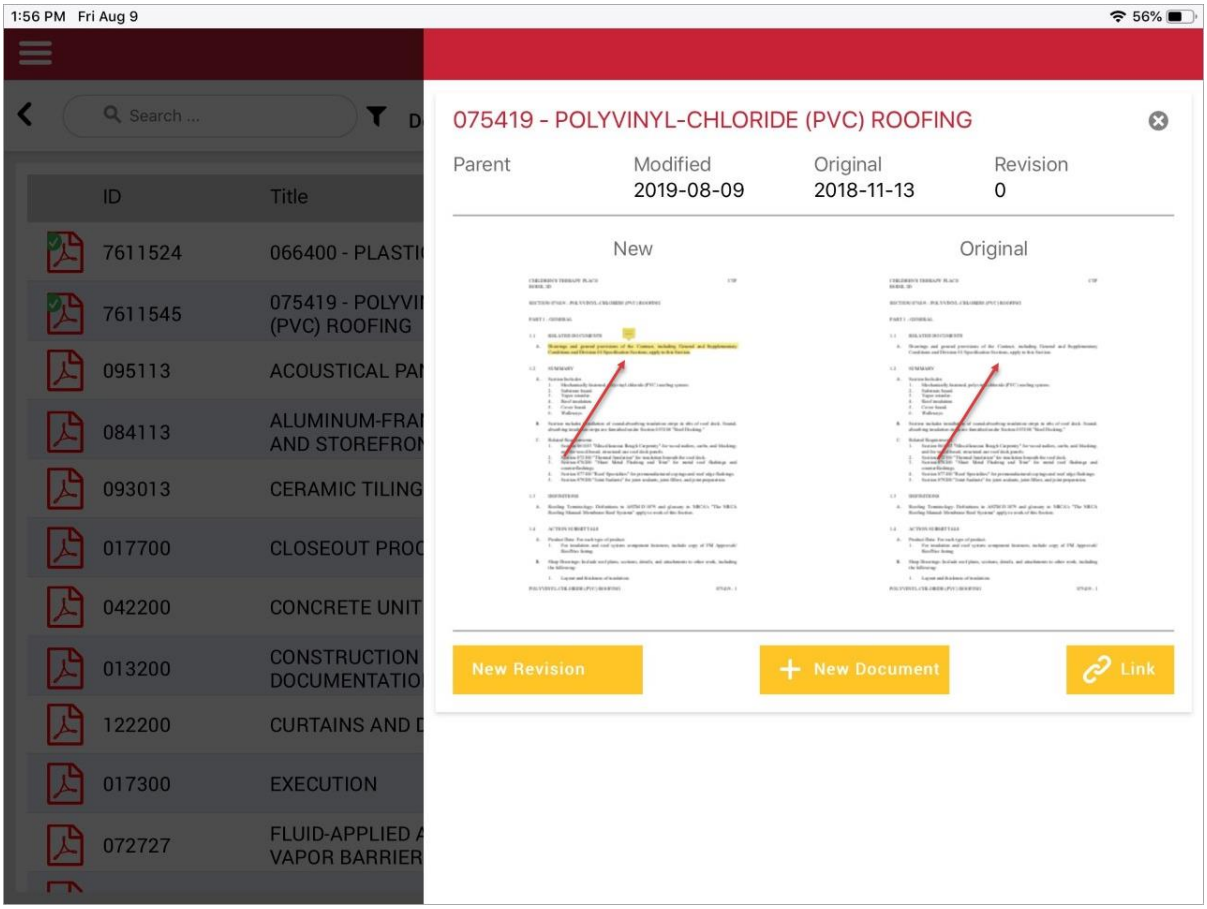


Saving Changes as Revisions or Including in Objects

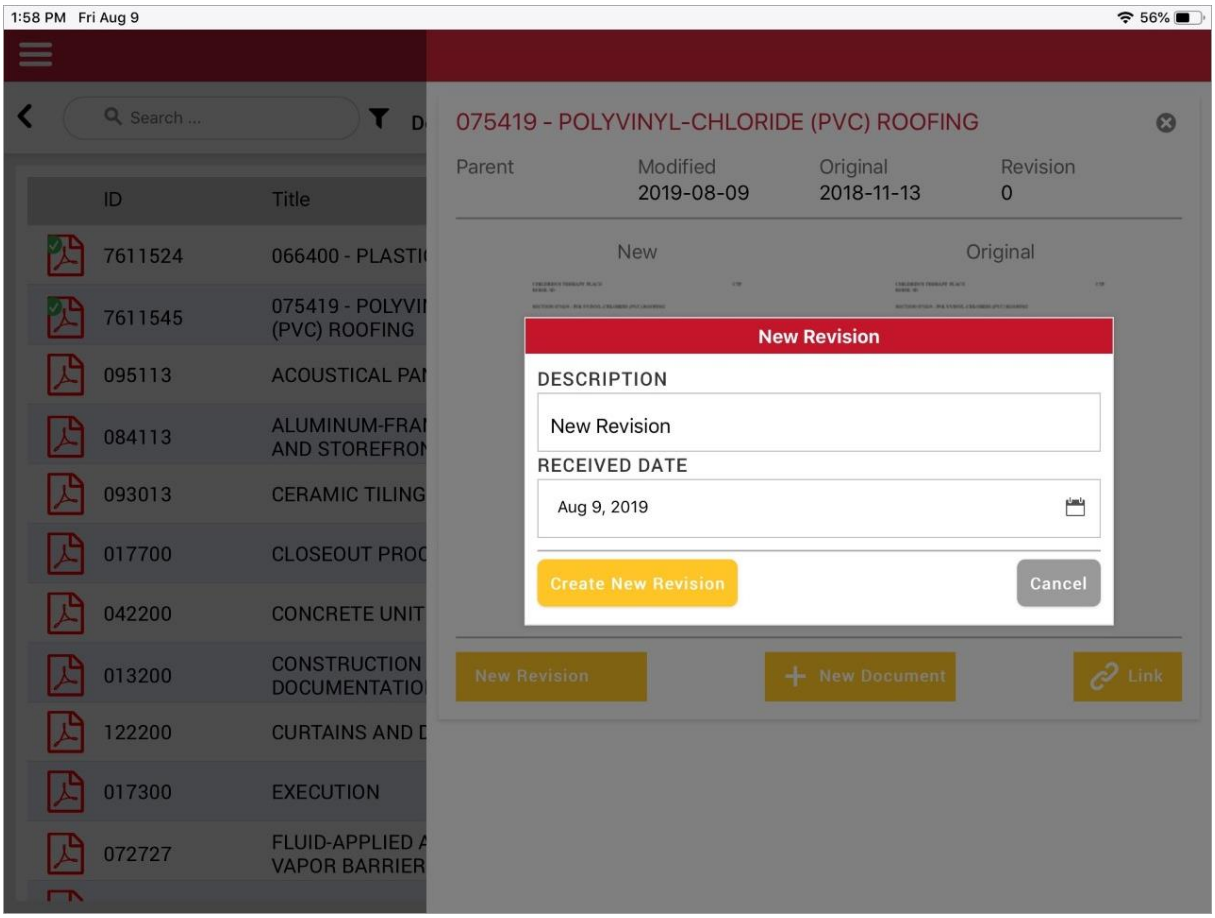
After making markups to a document, tap the Close icon (X) at the top-left corner of the screen to proceed:



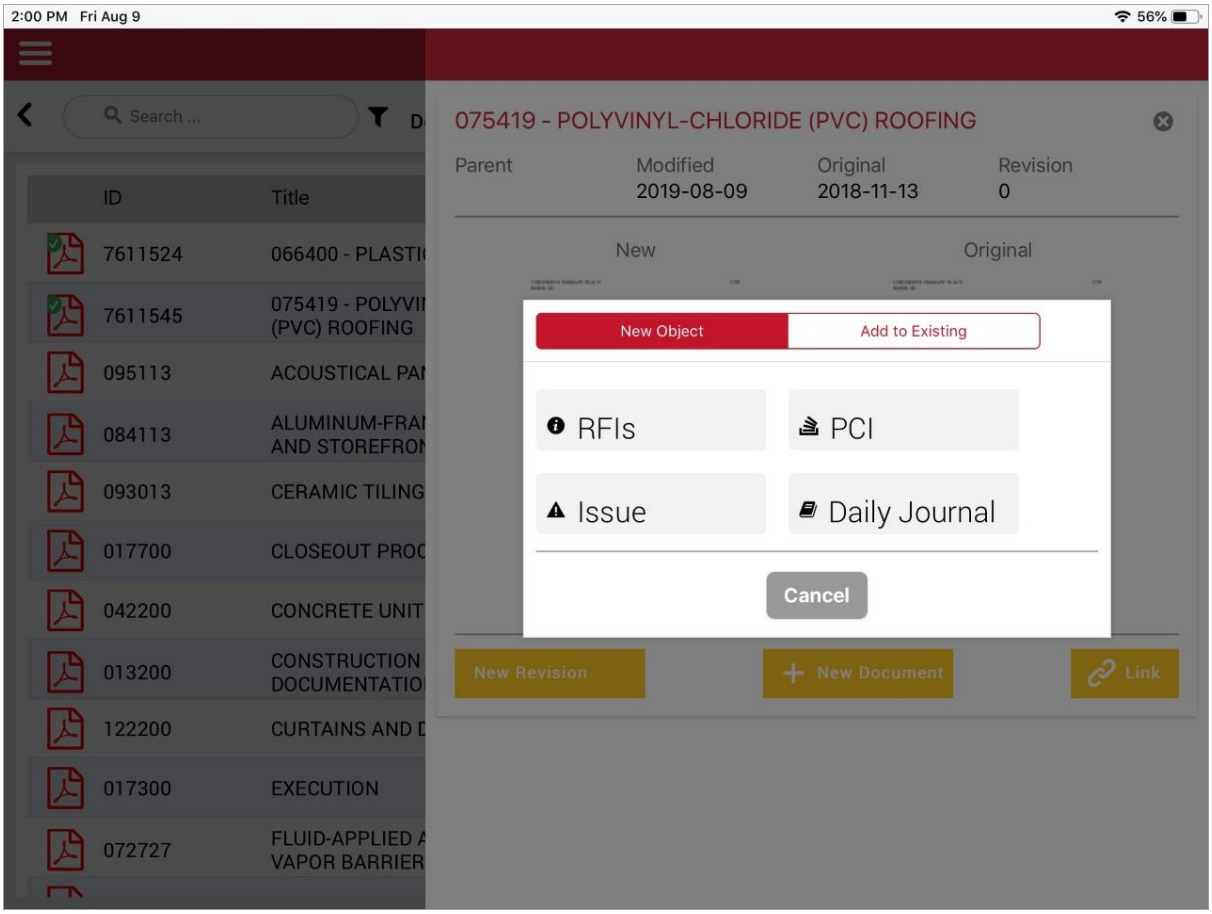
It will display the modified document laid beside the original (or previous revision):



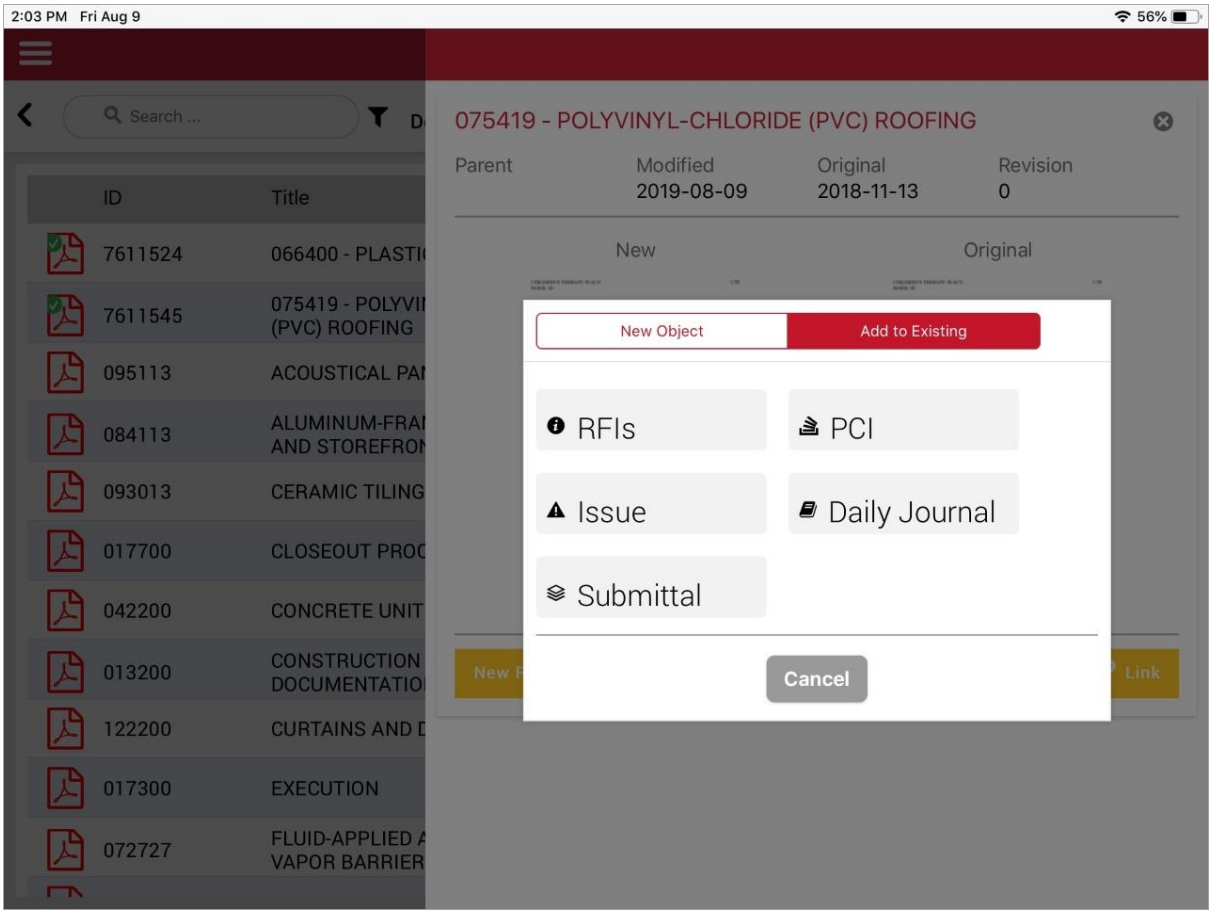
Tapping the [**New Revision**] button will display the pop-up window for creating a new revision:



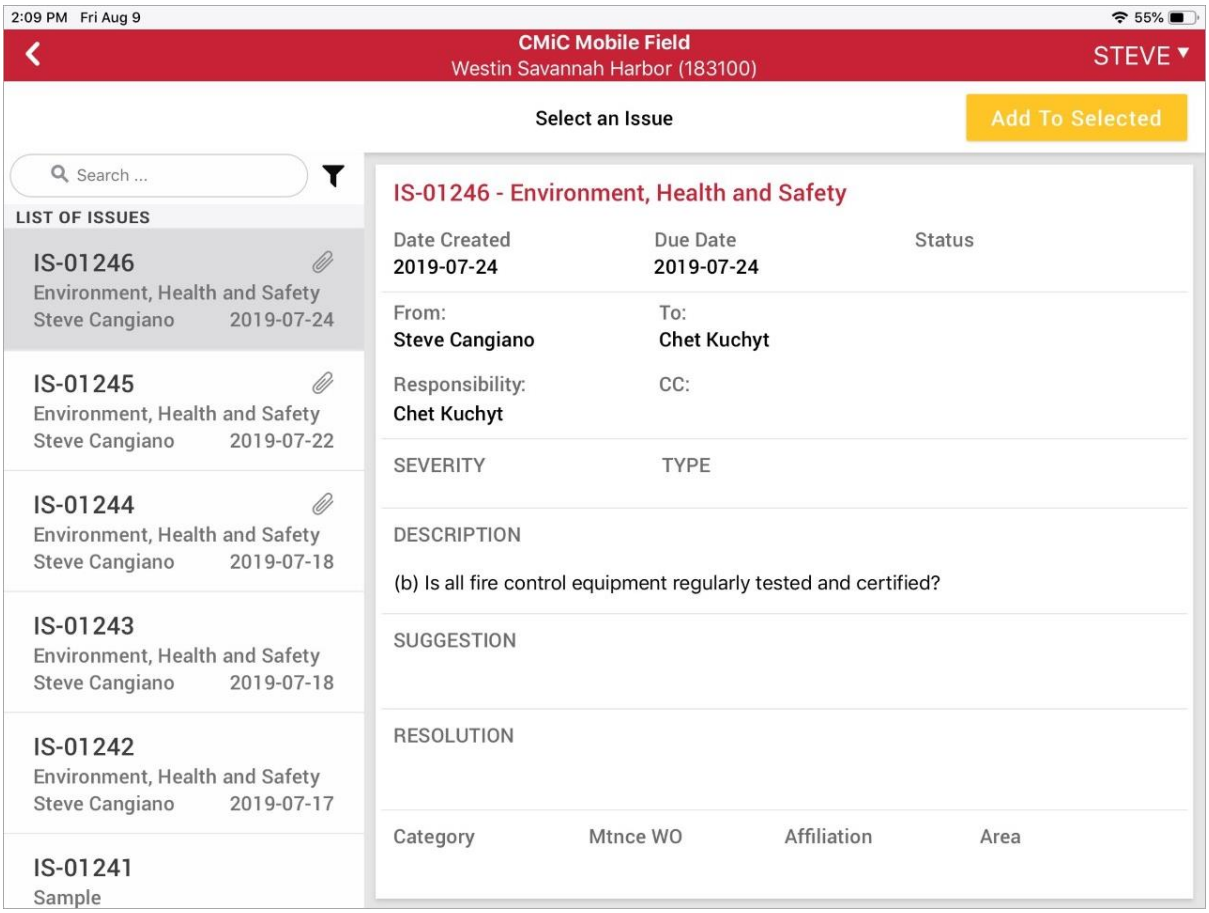
Tapping on the [**Link**] button will display the pop-up window for creating a new object (RFI, PCI, issue, or daily journal):



Tapping on the [**Add To Existing**] button will display the window for adding to an existing RFI, PCI, issue, daily journal, or submittal:

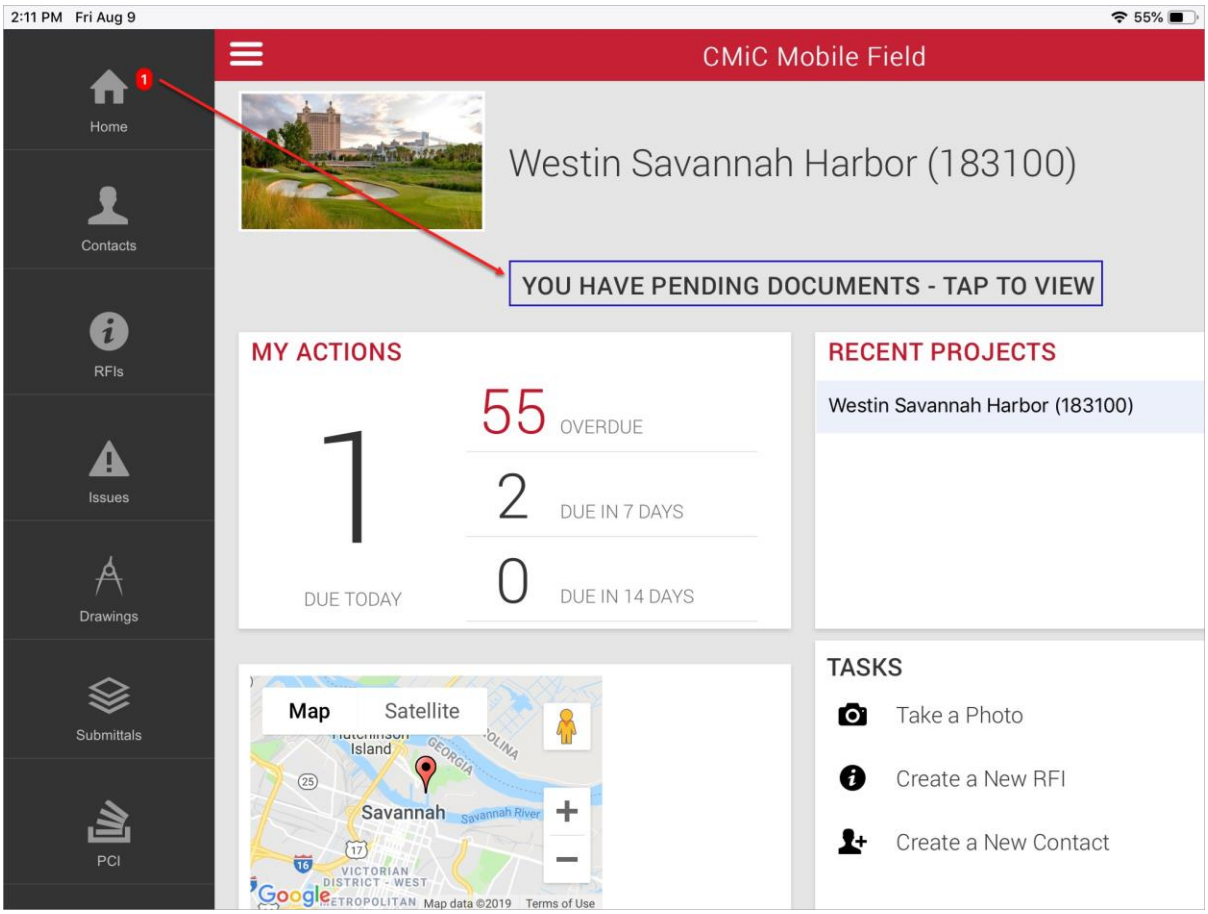


Whichever object is selected, the next screen displayed will be of the selected object with the Select An … or Create… title bar, and an [**Add To Selected**] button, for example:

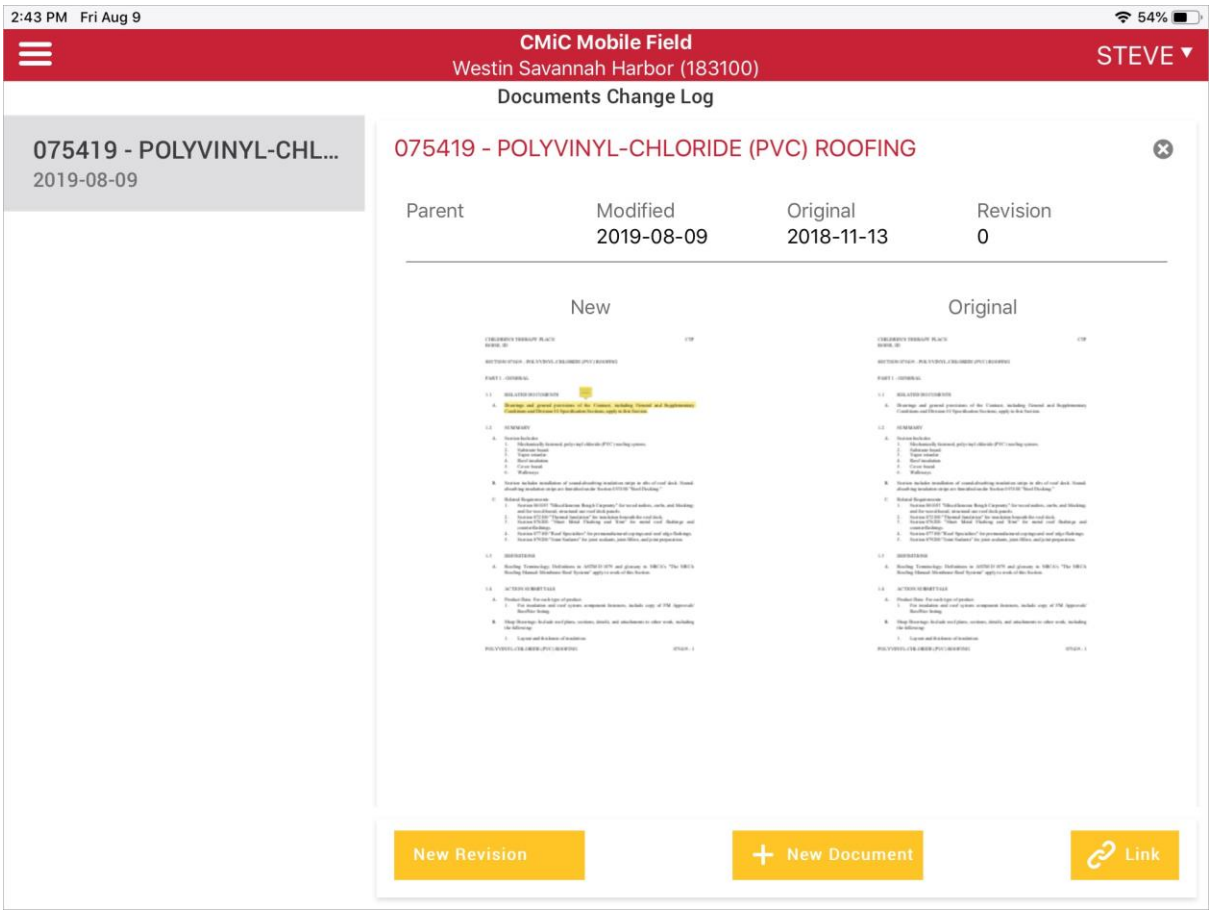


Pending Documents

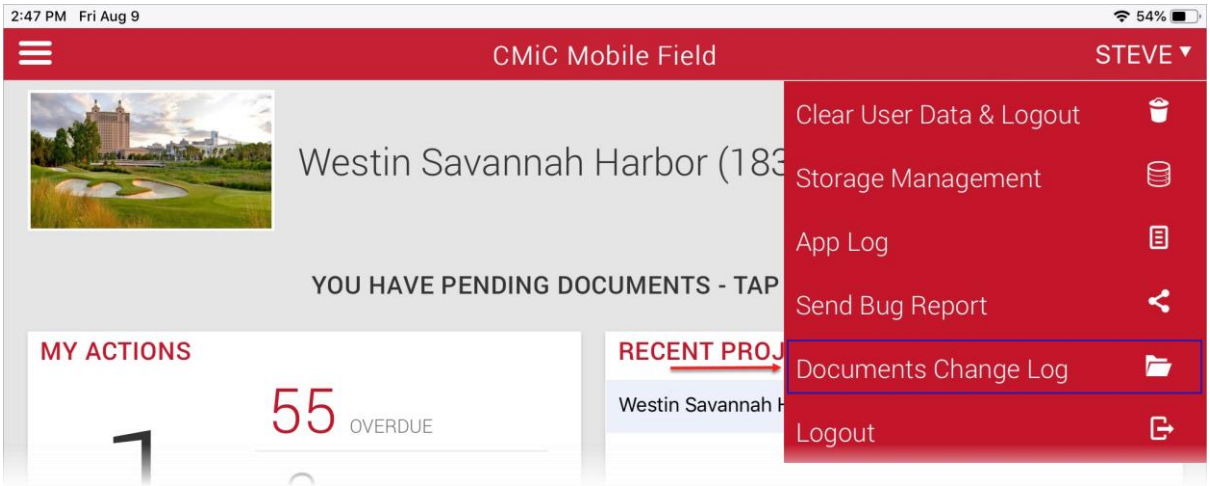
If markups were previously made and were not saved to another revision or to an object, when the user logs into the Mobile Field app a number indicator beside the Home menu item will indicate the number of pending documents there are. There will also be an alert on the Home screen stating, “You have pending documents – Tap to View”:



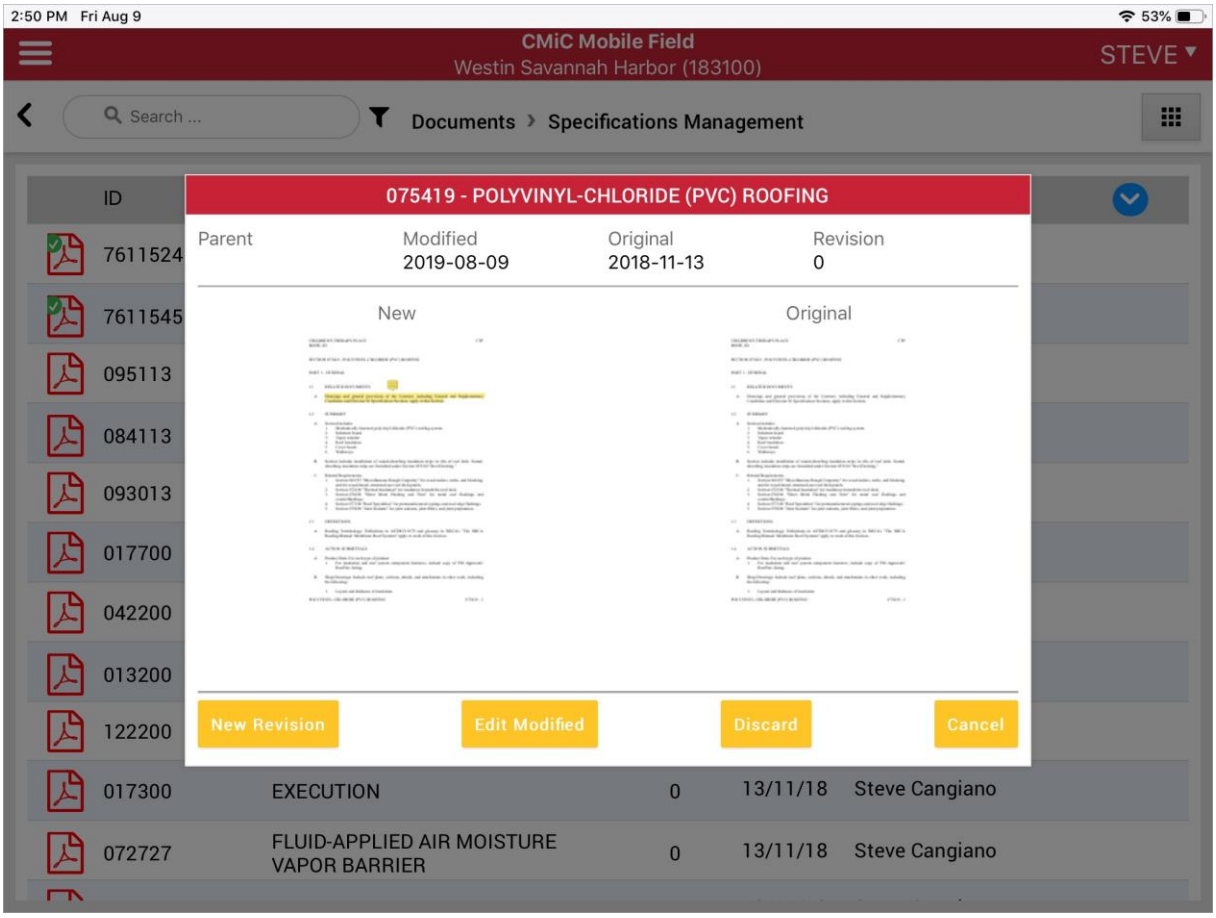
Tapping on the alert message will display the pending documents in the Documents Change Log screen:



The Documents Change Log screen can also be accessed using the drop-down arrow beside the user ID in the top-right corner of the app (if there are no Pending Documents the Documents Change Log item will not be displayed in the drop-down):



Otherwise, the document record can be accessed from the Documents screen, in which case when the user taps on it, it will display the following:



[**New Revision**] will display the user interface for creating a new revision.

[**Edit Modified**] will display the same revision so that the user can continue making markups to it, or the previous changes can be discarded using the [**Discard**] button.

User Defined Fields & Classifiers

User-defined fields (UDFs) and user-defined classifiers (including free-form), which are defined in the System module, can be used in the following screens: RFIs, Issues, Submittals, PCIs, Daily Journal (Header, Manpower, Trade Equipment), and Punch List.

User-defined fields are assigned to PM objects in CMiC Field's User-Defined Fields screen (standard Treeview path: *CMiC Field > File Maintenance >User-Defined Fields)*, and user-defined classifiers are assigned to PM objects in the System module's Classifiers screen (standard Treeview path: *System > User Extensions > Classifiers)*.

Mobile Collaboration

Overview

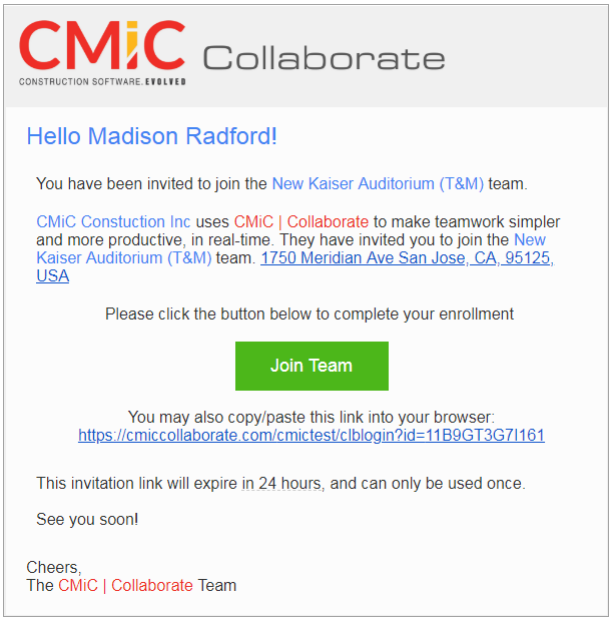
CMiC Collaborate is a cloud-based hub that connects CMiC clients and their projects with external collaborators. It enables CMiC Field clients to easily invite their project team to collaborate on any project to

which they have been invited, using their single sign-on credentials. The following subsection describes the process for invitation acceptance to access CMiC Collaborate using Mobile Field.

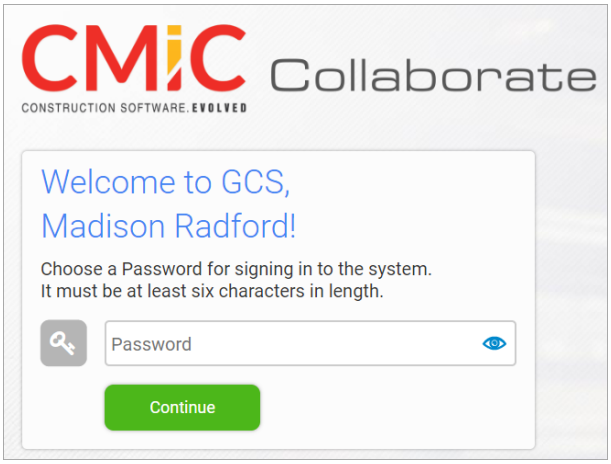
Process for Invitation Acceptance

Once an invitation is sent out to a contact, it will be received in the contact's email. If they accept the invitation, they will then be carried through an account creation process and will see the dashboard showing the project that they have been invited to.

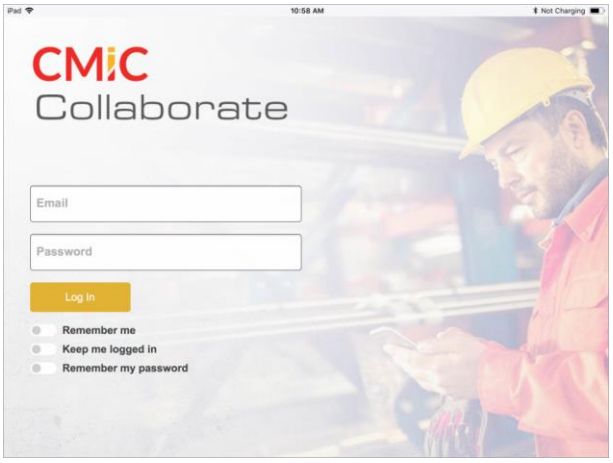
For example:



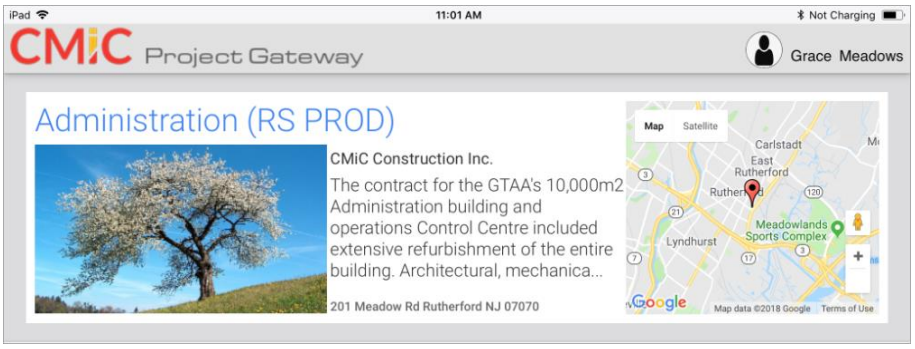
The contact should then enter the number sent to their email and then enter a password in the screen as shown below:



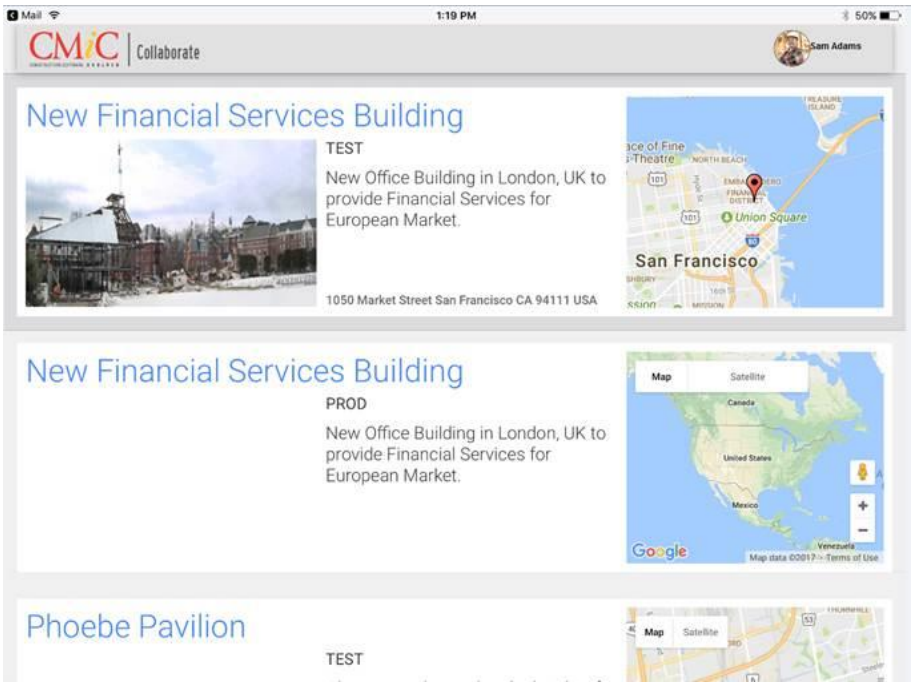
After going through the account creation process, the contact will then be able to log into CMiC Collaborate:



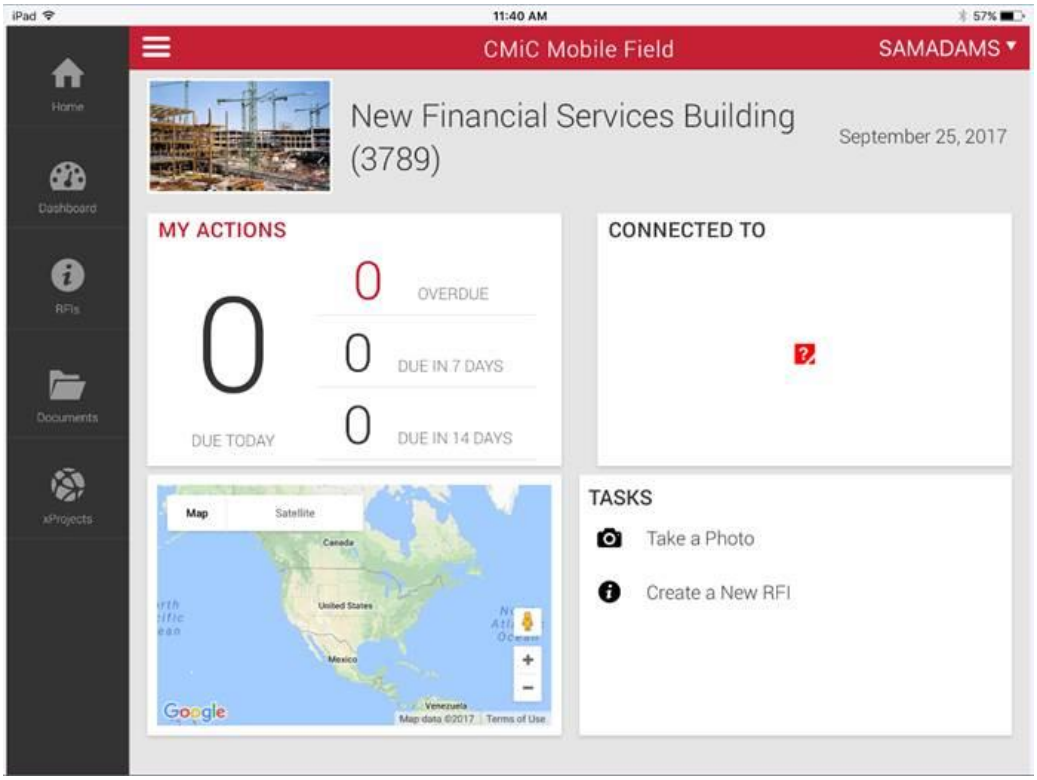
The dashboard will be displayed:



The contact may receive and accept invitations from multiple companies that they are doing business with. After initially creating an account, the system will recognize and register the contact in GCS, for subsequent projects, by linking the email address. The dashboard will then show all the projects that the contact was invited to and had accepted.



From the dashboard, the contact can easily access any project they wish by just tapping on it, to get the Mobile Field display for the project:

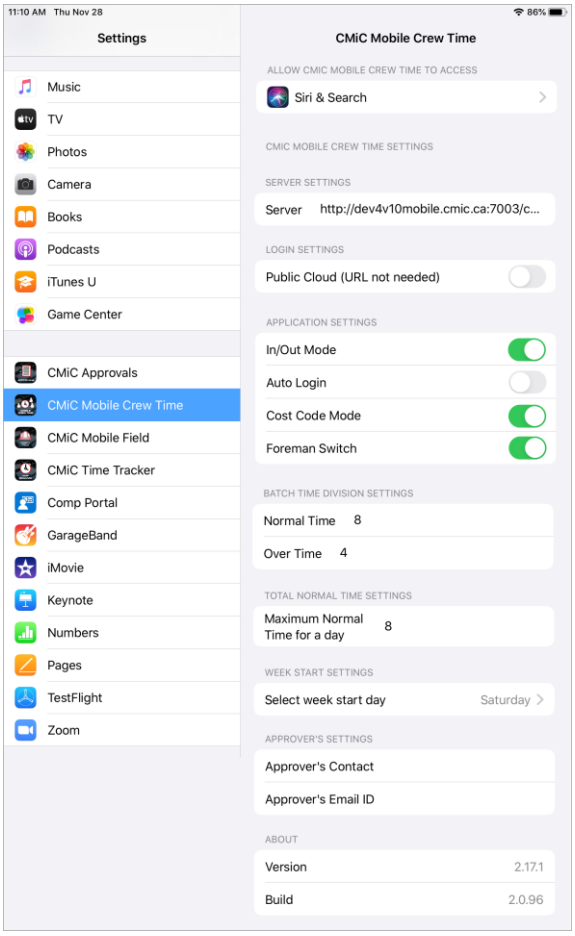


Mobile Crew Time – iPad

Overview – Mobile Crew Time

The Mobile Crew Time app is a mobile timesheet entry program designed to replace paper-based time entry and enable field foremen and supervisors to complete and save crew timesheets in the CMiC E-Time system wherever and whenever they please.

App Settings – iPad



Settings – CMiC Mobile Crew Time screen

The Settings screen, launched with the Settings icon ( ) and tapping the CMiC Mobile Crew Time link, can be used to configure the CMiC Mobile Crew Time app and to set user preferences.

SERVER SETTINGS

Server

Enter the server address to which the app should connect. The general format for server addresses is as follows:

http(s)://<*server_name*>

For example: http://testmobile.cmic360.com:7003

CMiC Cloud clients should not use this field and the Public Cloud (URL not needed) option should be enabled instead.

LOGIN SETTINGS

Public Cloud (URL not needed)

This option should be enabled for CMiC Cloud clients. This launches the app in multitenancy mode and a Tenant ID will be required in order to log-in. If this option is enabled, the Server field should not be used as the database server is automatically provided by the app.

APPLICATION SETTINGS

In/Out Mode

Enable this option to enter in and out times for crew members. If not, then only daily or weekly totals may be entered.

Auto Login

Enable this option to save login credentials upon initial entry. The user is logged in automatically on every subsequent use of the app.

Cost Code Mode

Enable this option to display the cost codes for any activities for which time is logged. If this option is disabled, the column headers do not bear the names of their associated cost codes.

Foreman Switch

Enable this option to automatically add the login employee to the crew sheet.

BATCH TIME DIVISION SETTINGS

Normal Time, Over Time

When entering time for multiple crew members in batch, one value is entered. The Normal Time and Over Time fields are used to specify how much of that entered value is considered normal time and how much of it is considered overtime for any given day. Any remaining time is considered double overtime.

For example, if a batch time of 14 hours is entered for a single day in the Daily Crew Sheet screen and the values entered in the Normal Time and Over Time fields are eight and four, respectively, then each crew member is logged as having worked eight regular hours, four overtime hours, and two double overtime hours.

TOTAL NORMAL TIME SETTINGS

Maximum Normal Time for a Day

If the normal time entered for an individual crew member is greater than the amount in this field, a prompt is displayed when the timesheet is saved stating the crew member's normal time must be equal to or less than this field's value.

WEEK START SETTINGS

Select week start day

Select which day is considered the first day of a week. Hours for this day appear at the beginning of each timesheet row.

APPROVER'S SETTINGS

Approver's Contact, Approver's Email ID

Enter the approver's phone number and email address. These are used to notify the approver when a timesheet is submitted.

ABOUT

This section is display-only and shows the version and build number for the currently installed version of the Mobile Crew Time app.

MDM SETUP

MDM Setup for CMiC Mobile Crew Time – iOS

For MDM portals, the XML tags that the CMiC Mobile Crew Time app supports are:

- PublicUrlMode – for public cloud URL
- EnvironmentURL – for server URL
- TotalNormalTime – for Maximum Normal Time for a Day
- BatchNormalTime – for Normal Time Batch Division Setting
- BatchOverTime – for Over Time Batch Division Setting
- ForemanState – for automatic addition of login employee to crew sheet
- PhaseMode – for Cost Code Mode
- InOutMode – for In/Out Mode

For example:

```
<dict>
  <key>EnvironmentURL</key>
  <string>https://v10xsandboxmobiletest.cmicglobal.com/cmictest</string>
  <key>TotalNormalTime</key>
  <string>8</string>
  <key>BatchNormalTime</key>
  <string>8</string>
  <key>BatchOverTime</key>
  <string>4</string>
  <key>ForemanState</key>
  <true/>
  <key>PhaseMode</key>
  <true/>
```

```
  <key>InOutMode</key>
  <true/>
  <key>PublicUrlMode</key>
  <true/>
</dict>
```

Login Screen

Sample of Enterprise's Login screen

Sample of CMiC Cloud's Login screen

Log in using the user ID and password provided. CMiC Cloud clients should also provide their Client ID.

Please note that these credentials can also be login to the E-Time module.

[**Offline Access**] – Button

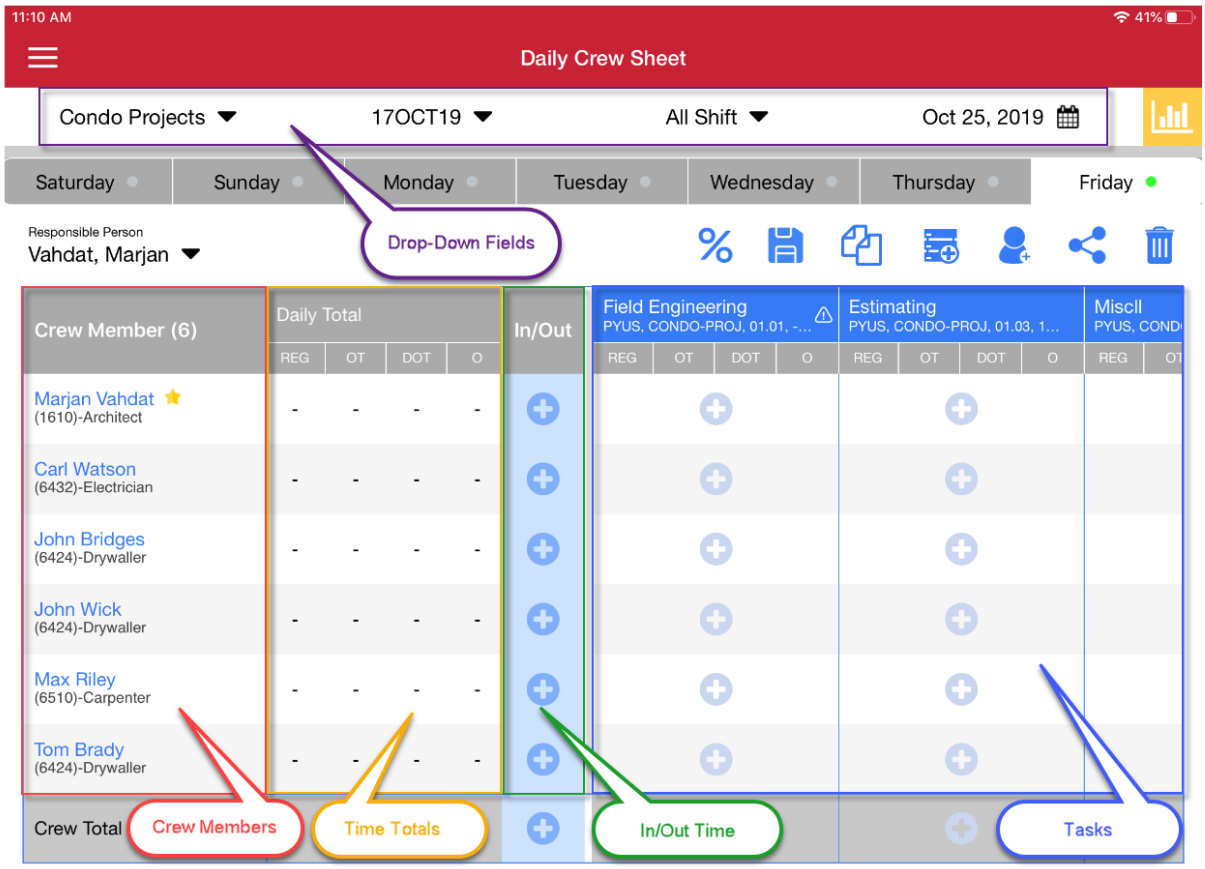
Press this button to enter timesheets in the absence of an internet connection.

In Offline mode, entered timesheets are saved to the device rather than being uploaded to the system. When an internet connection is established, the app automatically uploads the timesheets to the relevant server.

Daily Crew Sheet

The Daily Crew Sheet screen can be used to enter timesheets for a crew, either individually or in batch.

Crew Timesheet Components



Daily Crew Sheet

Shown above are the components of a crew timesheet.

Screen's Main Controls

Icons

	Brings up the Phase Quantities screen. This icon will only appear after the Save icon is pressed.
	Displays the main menu.
	Saves the timesheet for the selected day.
	Copies time entered from another day to the selected day.
	Adds a new activity column to the Tasks section, highlighted above.
	Adds a new employee to the crew.

	Sends an email or text message to the approver with details of the timesheet. The email address and phone number can be set in the Approver's Settings section of the Settings app.
	Deletes the data entered for the selected timesheet.

Main Menu Icons

Tapping the Main Menu icon to display the following icons:

	Displays the Weekly Dashboard View screen.
	Displays the Daily Crew Sheet screen.
	Activates In/Out Mode. See the *App Settings* section for further details.
	Creates a log file of entered timesheets which can be sent, saved, or copied.
	Deletes all local data saved by the app. Please note, this does not delete any submitted timesheets as these are saved on the server rather than on the device itself.
	Signs the current user out of the app and returns the app to the Login screen.

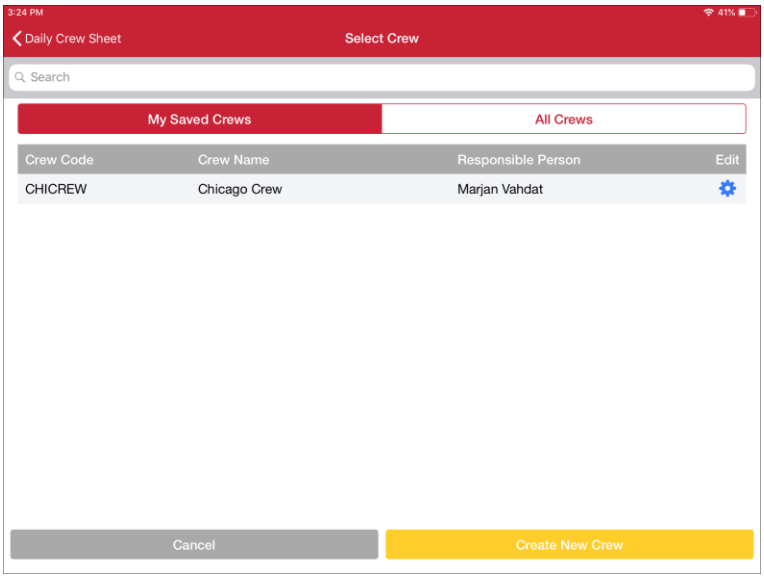
Daily Crew Sheet Drop-Down Fields

The main Daily Crew Sheet screen can also be used to change the project, crew, shifts, responsible person, and date for which timesheets are being entered. These fields appear in the Drop-Down Fields box, highlighted in the Daily Crew Sheet screen above.

Any changes made using these fields are automatically carried forward to all other timesheets in that week.

Select Crew

Tap the crew drop-down field to bring up the Select Crew screen, as shown below:

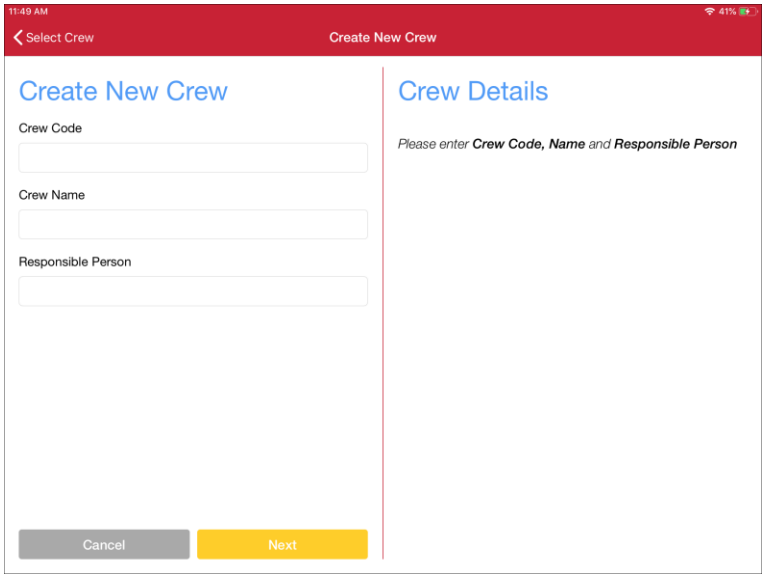


Select Crew – My Saved Crews tab

The My Saved Crews tab lists the crews created with the Mobile Crew Time app on this device. The All Crews tab lists the crews that have been created with the Mobile Crew Time app on any device.

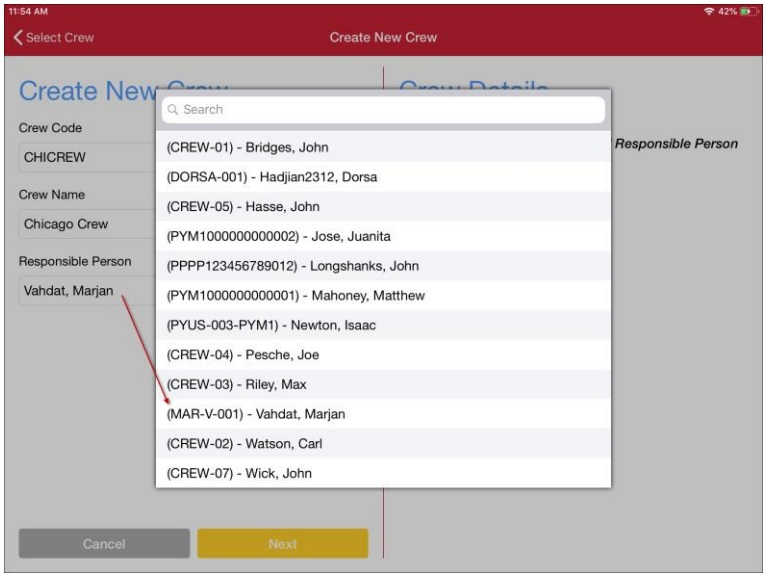
[**Create New Crew**] – Button

Press the [**Create New Crew**] button on the All Crews tab to open the Create New Crew screen.



Create New Crew

In the Create New Crew screen enter a code and name for the new crew and select the crew supervisor by tapping the Responsible Person field.



Create New Crew – Responsible Person field

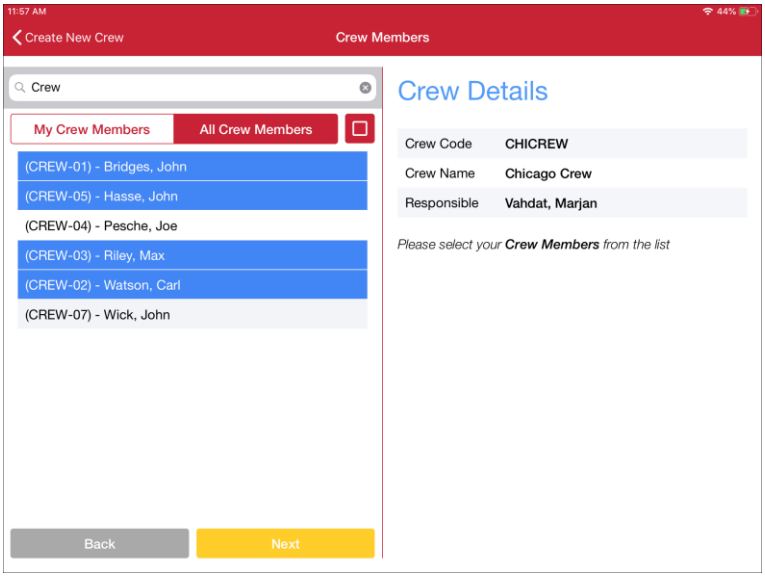
A new responsible person can also be selected with the Responsible Person drop-down field in the Daily Crew Sheet screen.

When finished, press the [**Next**] button to open the Crew Members screen.

Crew Members

In the Crew Members screen use the All Crew Members tab to select the employees to add to the new crew. Tap the Select All icon (☐) to select all crew members. Selected employees are highlighted in blue.

This screen can also be reached by tapping the Crew drop-down field.



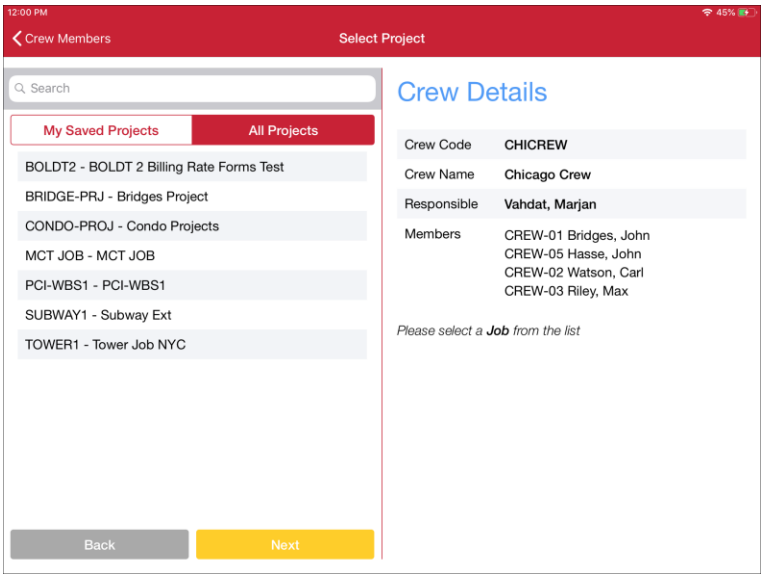
Crew Members – All Crew Members tab

After selecting the employees to add to the crew, press the [**Next**] button to go to the Select Project screen.

Select Project

The My Saved Projects tab lists projects saved on the device, and the All Projects tab lists all projects to which the logged-in user has access.

This screen can also be reached by tapping the Projects drop-down field on the Daily Crew Sheet screen.



Select Project – All Projects tab

After selecting the project, press the [**Next**] button to reveal the Select Cost Code screen.

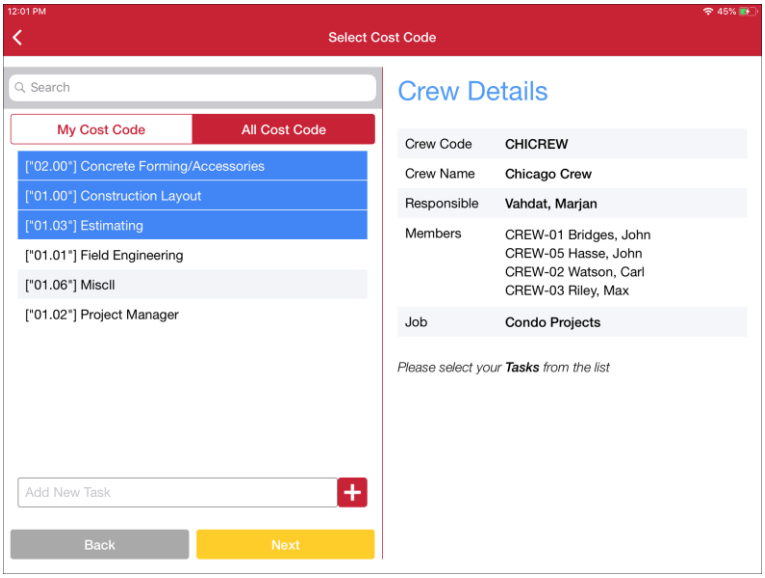
Select Cost Code

The My Cost Code tab only lists cost codes previously selected on other projects. The All Cost Code tab displays all currently available cost codes. Tap the Plus icon (+) to add a new cost code, if required.

Cost codes can also be added by pressing the Add Task icon in the Daily Crew Sheet.

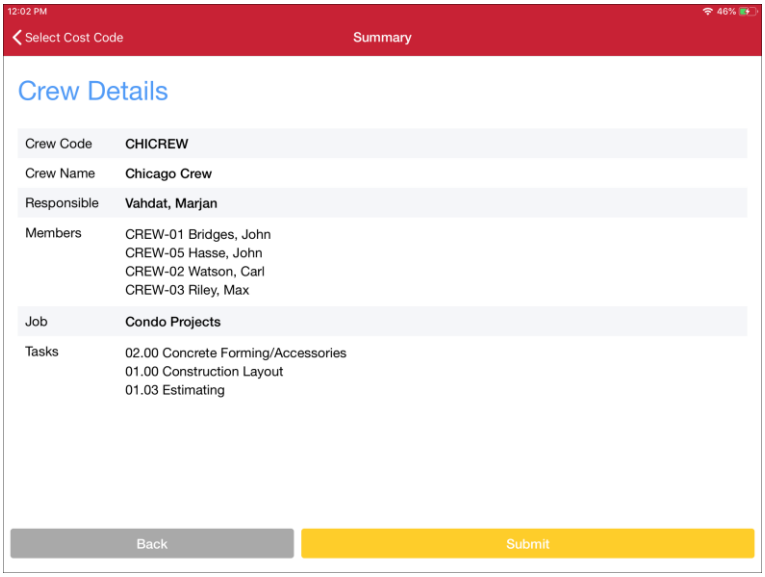
To delete a cost code on the Daily Crew Sheet, hold the column name. Press the [Delete] button to delete that column or press the [Delete Multiple] button to delete multiple task columns at once.

NOTE: If Cost Code Mode is enabled in the CMiC Mobile Crew Time section of the Settings app, the names of the cost codes selected on this screen automatically becomes the headings in the Activity columns in the Daily Crew Sheet screen.



Select Cost Code – All Cost Code tab

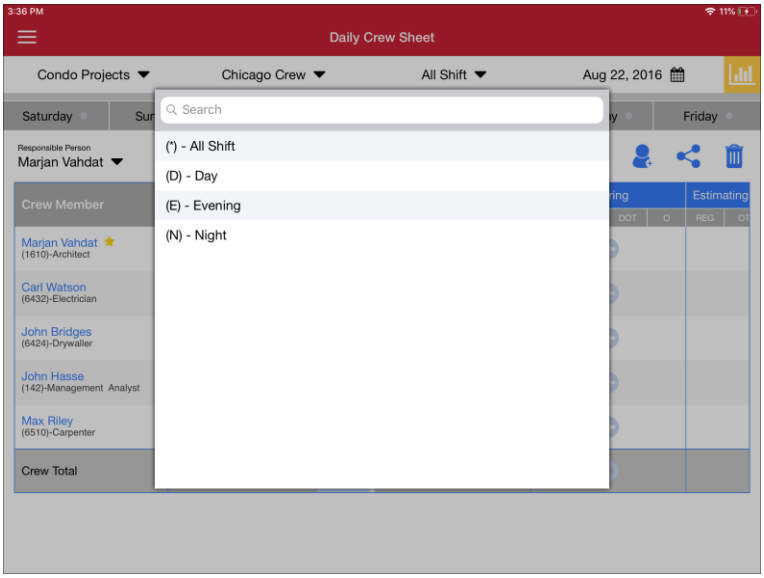
When finished selecting cost codes, press the [**Next**] button to move to the Summary screen. This screen provides a detailed summary of the newly created crew for review. Provided all crew details are accurate, press the [**Submit**] button to complete the timesheet creation process.



Summary screen

Select Shift

Tap the shift drop-down field to display the Shift pop-up.

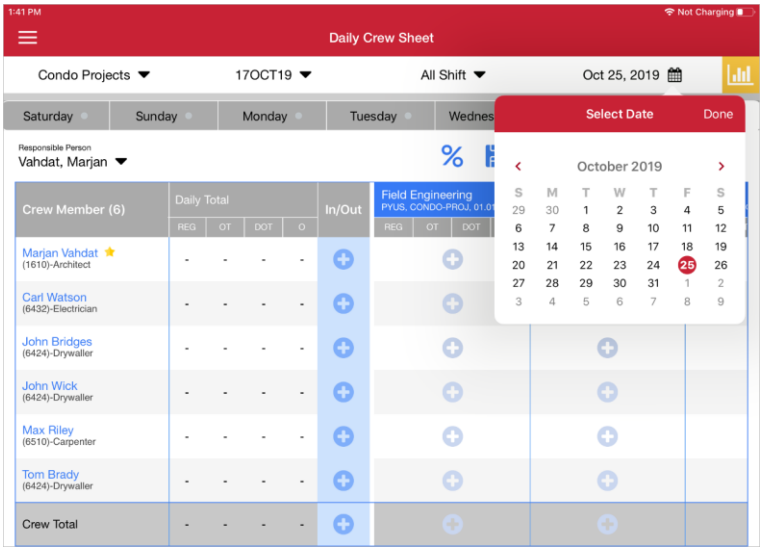


Daily Crew Sheet – Shift pop-up

Select whether to view all, day, evening, or night shifts on the Daily Crew Sheet screen. The pop-up is removed automatically upon selection.

Select Date

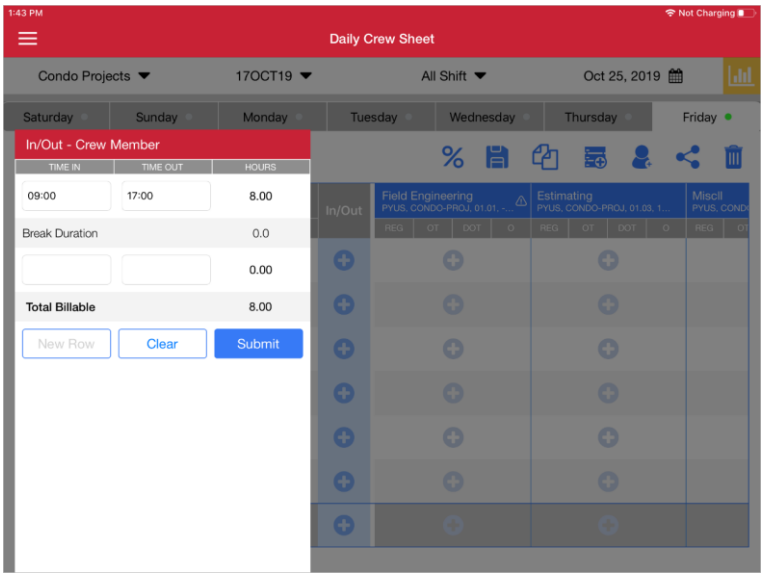
Tap the calendar icon to reveal the Select Date pop-up. Select the date for which to enter timesheets and tap the [**Done**] button.



Daily Crew Sheet – Select Date pop-up

Timesheet Entry

In/Out Time



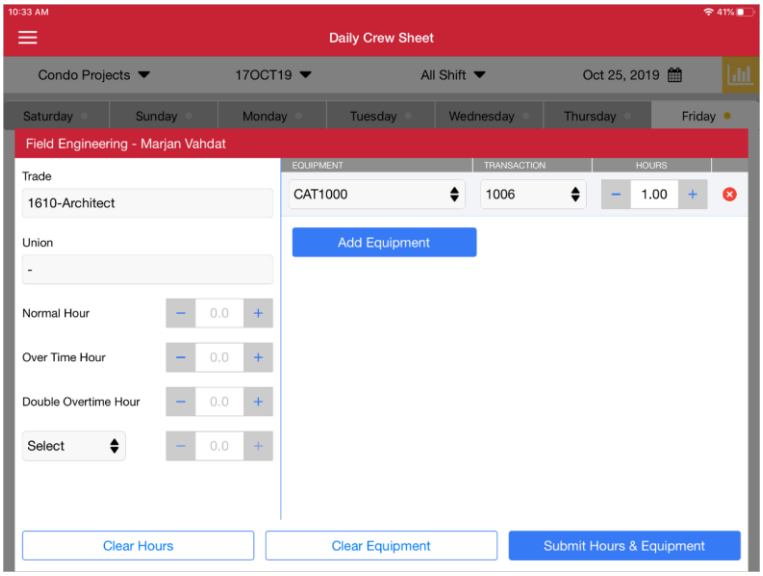
Daily Crew Sheet – In/Out – Crew Member pop-up

Total time for a workday can either be entered for individual employees or for the crew as a whole by tapping the relevant Plus icon ( ) in the In/Out column. Once the Time In and Time Out fields have been entered, a new billable row can be entered by pressing the [**New Row**] button. The spans of time entered in each row should not overlap. The breaks between each work section are calculated automatically and are displayed in the "Break Duration" line. As many rows (and as many breaks) can be added as desired.

When entering time in batch, hours can't be manually distinguished as normal, overtime, and so on in this screen. Instead, standard values for the number of applicable normal and overtime hours should be set in the Settings app. Please see the *App Settings* section of this guide for more information.

Press the [**Clear**] button to remove any time entered. Press the [**Submit**] button to display the entered time on the crew timesheet. Timesheets that are being entered but not yet submitted have a yellow circle next to the day name, while submitted timesheets have a green one.

Cost Code Time Entry



Daily Crew Sheet – Cost Code Time Entry pop-up

Time can be entered for specific activities or cost codes by pressing the relevant Plus icon ( ) in the cost code/activity column. Time can then be entered for individuals or for an entire crew. Pressing the Plus icon brings up the screen shown above. As opposed to the In/Out time entry screen this screen allows the entry of different types of hours worked. The screen automatically allows for the entry of normal, overtime, and double overtime hours. Other hour types can also be selected.

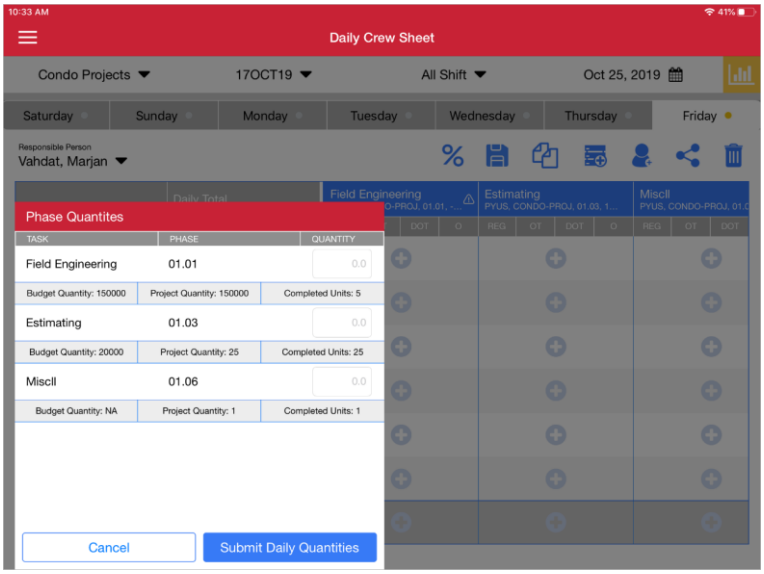
In order for overtime and double overtime to be available for an individual member of the crew, the 'Entered Overtime' and 'Entered Double Overtime' boxes should be checked on the Rates/Salary tab of the Employee Profile.

Time for a given cost code can also be entered against a piece of equipment by pressing the [**Add Equipment**] button.

Press the [**Clear Hours**] button to remove any time values entered and the [**Clear Equipment**] button to remove any added equipment. Press the [**Submit Hours & Equipment**] button to display the entered time on the crew timesheet.

NOTE: If the hours entered through Cost Code Time Entry do not match the hours entered in the In/Out Time column, an error is given and the timesheet may not be submitted.

Phase Quantities

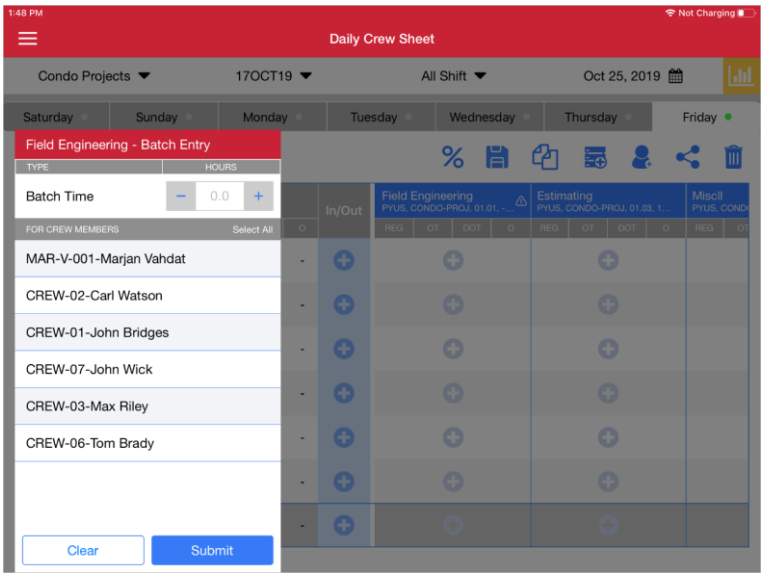


Daily Crew Sheet – Phase Quantities pop-up

The Phase Quantities pop-up can be opened by pressing the Percentage icon (%). This screen can be used enter separate, daily quantities for each phase that appears on the timesheet. The budget and project quantities, as well as the completed number of units, appear under each phase line.

After quantities have been entered, press the [**Submit Daily Quantities**] button. Press the [**Cancel**] button to return to the Daily Crew Sheet screen.

Batch Entry

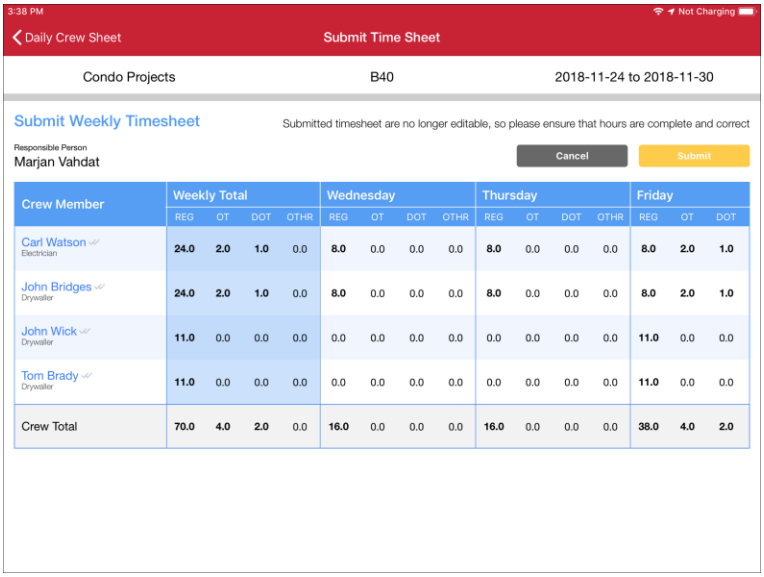


Daily Crew Sheet – Batch Entry pop-up

Time can be entered against a particular cost code by pressing the Plus icon ( ) in the Crew Total row for the relevant cost code column. Select the time to attribute to all crew employees in the Hours field and press the [**Submit**] button.

Submit Weekly Timesheets

Once the times for an entire week have been entered, they can be submitted by tapping the Weekly Timesheet icon ( ). Doing so brings up the Submit Time Sheet screen, shown below.



Crew Member	Weekly Total				Wednesday				Thursday				Friday		
	REG	OT	DOT	OTHR	REG	OT	DOT	OTHR	REG	OT	DOT	OTHR	REG	OT	DOT
Carl Watson Electrician	24.0	2.0	1.0	0.0	8.0	0.0	0.0	0.0	8.0	0.0	0.0	0.0	8.0	2.0	1.0
John Bridges Drywaller	24.0	2.0	1.0	0.0	8.0	0.0	0.0	0.0	8.0	0.0	0.0	0.0	8.0	2.0	1.0
John Wick Drywaller	11.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.0	0.0	0.0
Tom Brady Drywaller	11.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	11.0	0.0	0.0
Crew Total	70.0	4.0	2.0	0.0	16.0	0.0	0.0	0.0	16.0	0.0	0.0	0.0	38.0	4.0	2.0

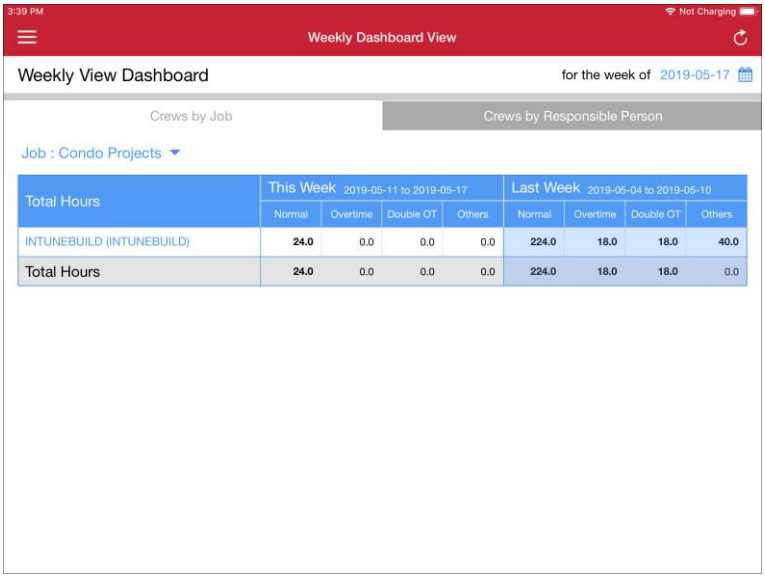
Submit Time Sheet screen

Press the [**Cancel**] button to return to the Daily Crew Sheet screen. Press the [**Submit**] button to submit the timesheet. Please note that submitted timesheets can no longer be edited, so ensure that all entered information is correct.

After timesheets are submitted and signed off by an approver, ticks appear next to the name of the approved employee, as shown above.

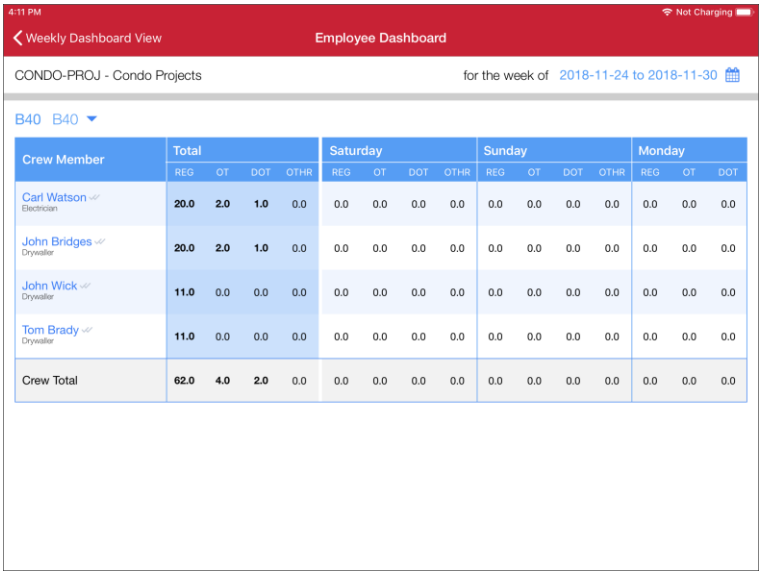
Dashboard

Tap the Dashboard icon ( ) in the Main Menu to display the Weekly Dashboard View screen. Timesheets can be organized by job or by responsible person. The date of the timesheets can be changed by tapping the Calendar icon ( ).



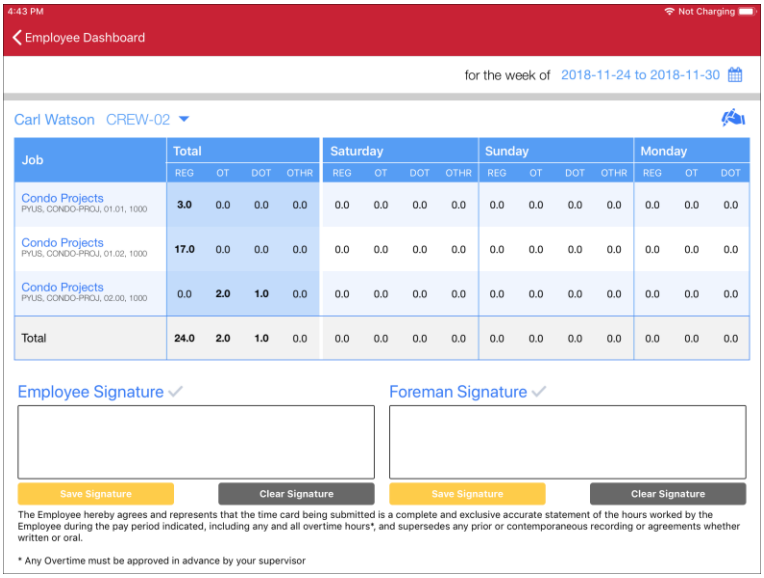
Weekly Dashboard View – Crews by Job tab

To display details of a timesheet, tap an hour type's value.



Employee Dashboard

Tap an individual crew member's hours to show the screen below.



Employee Dashboard – Signature screen

Tap the Signature icon ( ) to reveal the Employee Signature and Foreman Signature fields. The employee and responsible person should then both sign off on the hours using the iPad screen. Press the [**Save Signature**] button to comitt the signatures and approve the timesheet.

CMiC Time Tracker 1.0

Overview – CMiC Time Tracker

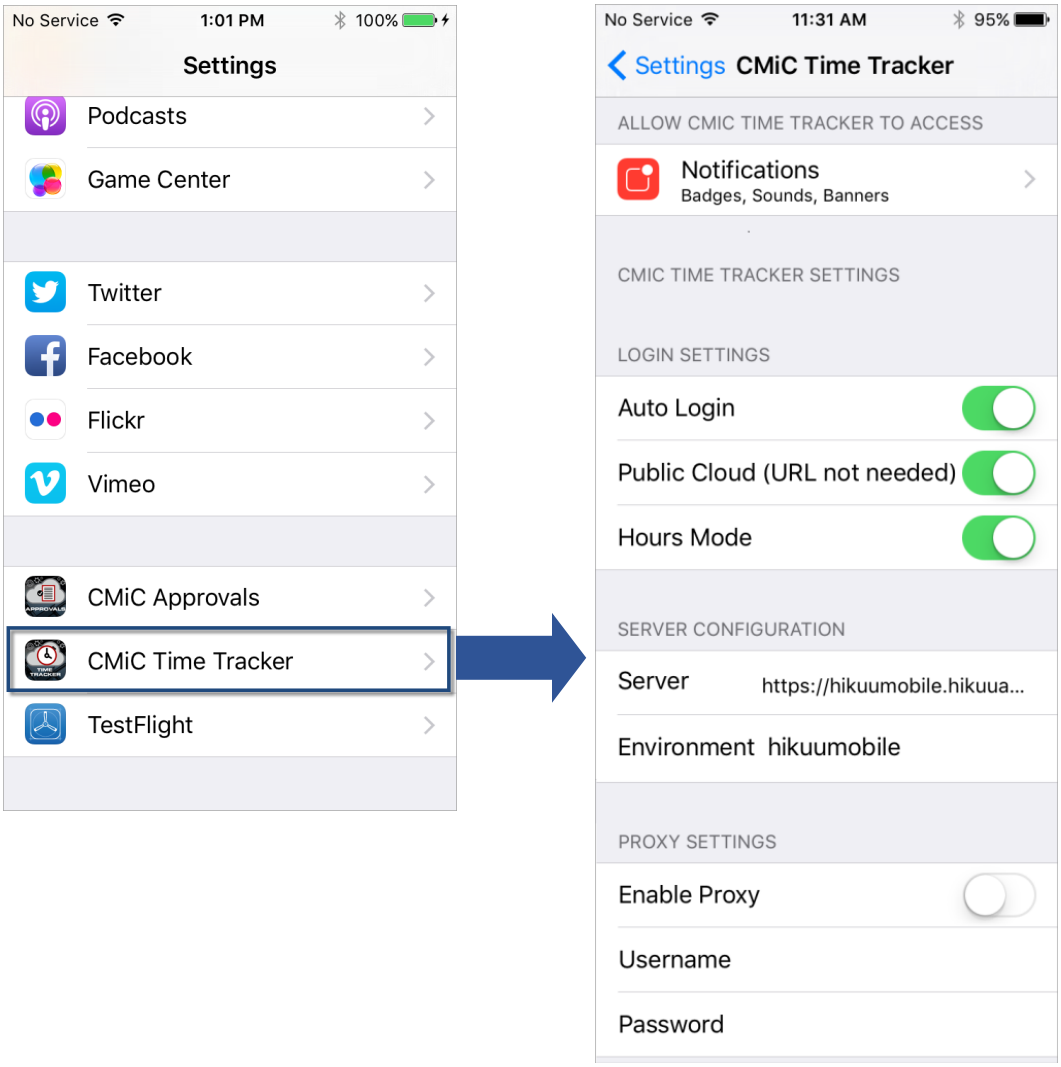
The CMiC Time Tracker app can be used to enter hours worked and submit timesheets into the CMiC E-Time system. Time can be entered against a particular job or as overhead.

The following section details correct setup and use of the Time Tracker 1.0 app on Apple products.

Set Up CMiC Time Tracker

Settings Screen

The Settings screen can be accessed via the Settings icon ( ).



Notifications

Tap the Allow Notifications toggle to allow the Time Tracker app to send push notifications and alerts to the device.

In the Alerts section, select where the notifications should appear and, if the Banners option has been selected, select whether banner notifications should be temporary or permanent.

Tap the Sounds and Badges toggles to accompany notifications with a sound or a badge, respectively.

In the Options sub-menu, select whether and when to show previews of any incoming notifications and how notifications should be grouped when more than one is received.

Auto Login

Tap this toggle to automatically log into the Time Tracker app when the app is opened. This will either require and use a saved user ID and password (if the Public Cloud toggle is set to off) or a tenant ID, username, and password (if the Public Cloud toggle is set to on).

Public Cloud (URL not needed)

Tap this toggle to use the public cloud server for Time Tracker. This setting should be turned on for CMiC Cloud clients, as it turns on the multitenancy mode. When turned on, the Server and Environment fields are automatically filled in, and a tenant ID will be required by the login screen.

Hours Mode

This option is used to set how timesheet entry is done. When set to ON, the user enters the number of hours worked. When set to OFF, the Check In and Check Out processes are used to automatically calculate the hours worked.

Server

Enter the URL for your company's mobile server. If you are a CMiC Cloud client, set the Public Cloud setting on to have this field automatically populated.

Environment

Enter the environment for the server. If you are a CMiC Cloud client, set the Public Cloud setting on to populate this field by default.

Enable Proxy

This Proxy Settings section is used if you are using a proxy server to connect to the internet. If a proxy server is being used, set this toggle to on, and enter the username and password for the proxy server.

Username, Password

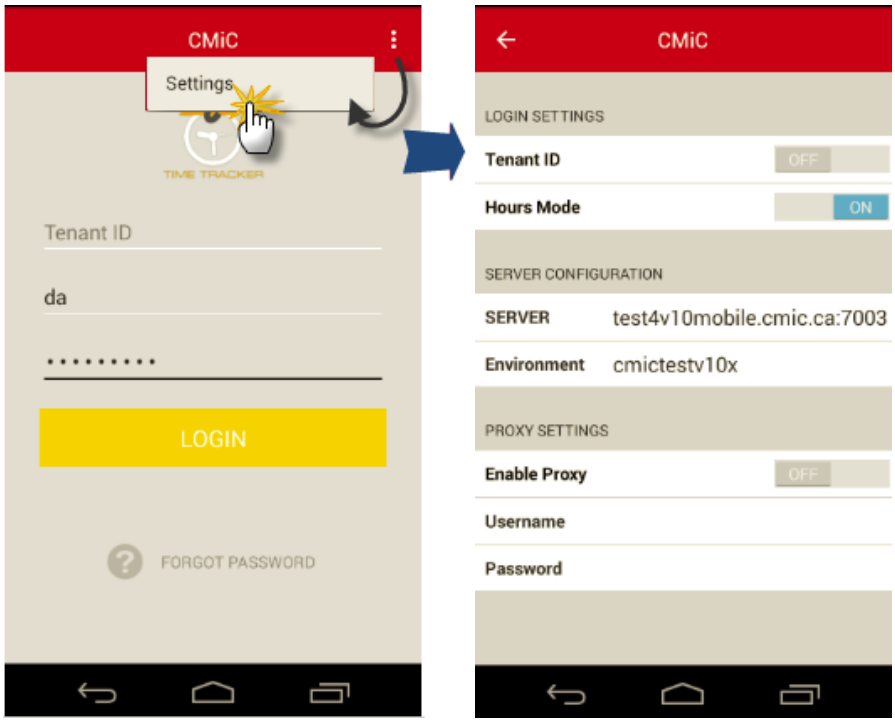
If the Enable Proxy toggle has been switched on, enter the username and password for the proxy server.

Payroll Setup Requirements

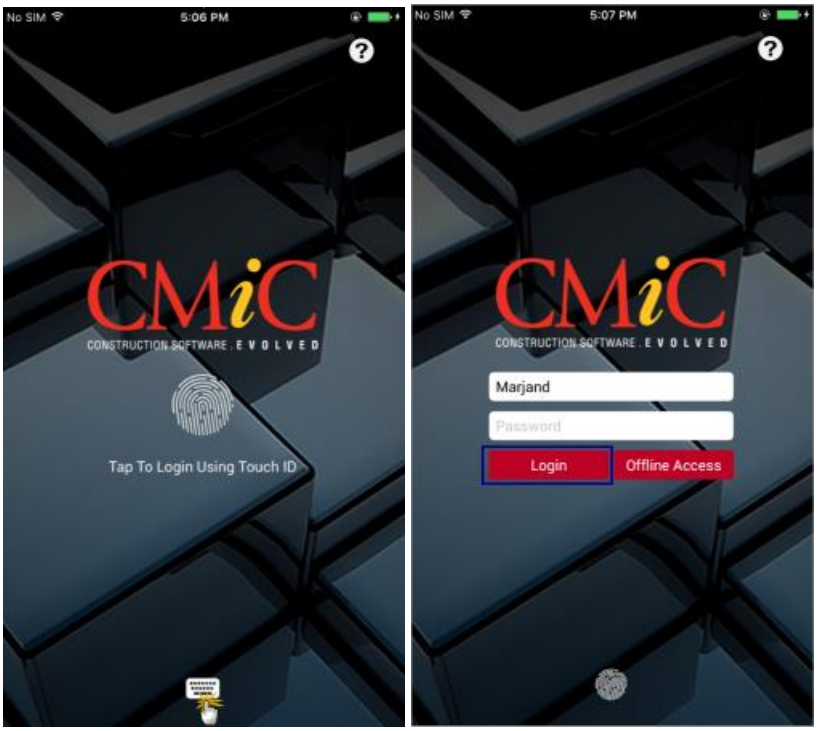
Please refer to the *Payroll Application Setup (Crew Time/Time Tracker/Pay Stub/*eXpense) section in this guide for more information on the required setup requirements in the US Payroll and E-Time modules.

Access Settings Screen for Android Smartphones

For Android smartphones, the setup screen is accessed via the Settings option on the CMiC Time Tracker's login screen, as shown below.



Login Screen



This is the screen that appears upon opening the Time Tracker app. This screen does not appear if the Auto Login toggle is switched on in the App Settings screen and correct login details have been previously saved.

The screen will prompt the user for a username and password. If using the public cloud server (i.e. if the Public Cloud toggle is switched on in the App Settings screen), then the user will be asked for a tenant ID, username, and a password.

To set up Touch ID for Time Tracker, a fingerprint should be registered through the Touch ID & Passcode screen in the Settings app by pressing the Add a Fingerprint… link.

NOTE: Users must be set up with an E-Time Access Code, and they must have a Single Sign-On user ID to log in to CMiC Time Tracker.

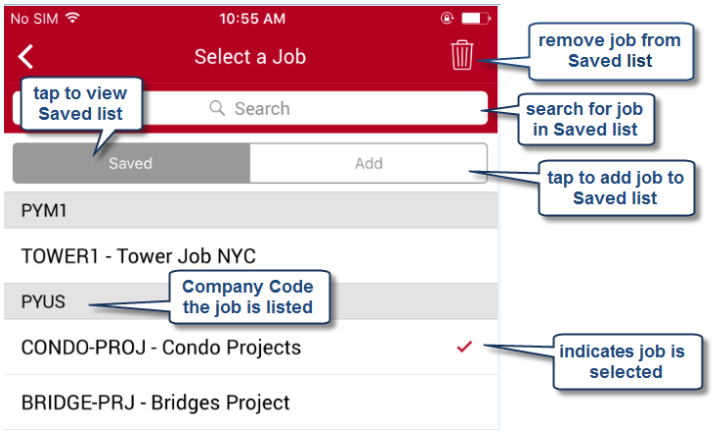
[**Offline Access**] – Button

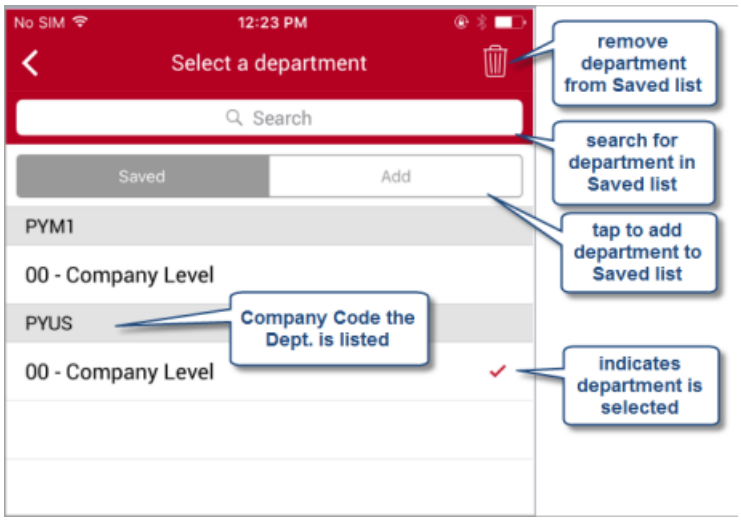
Press this button to start the Time Tracker app without an internet connection.

In offline mode timesheets are entered as usual, but are saved locally to the device instead of uploading them to the server entered in the Settings app. When the application detects an internet connection, it will automatically upload all timesheets entered in Offline mode.

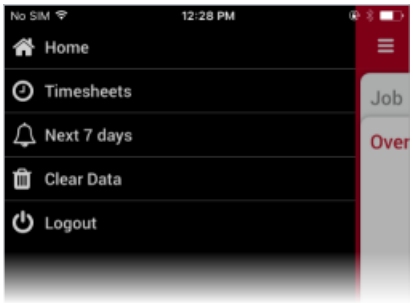
Prerequisites

To enter timesheets when offline, the Job or Overhead for which timesheets are to be entered against must have been saved via the Select a Job and Select a Department screens, as shown below.





Main Menu Options

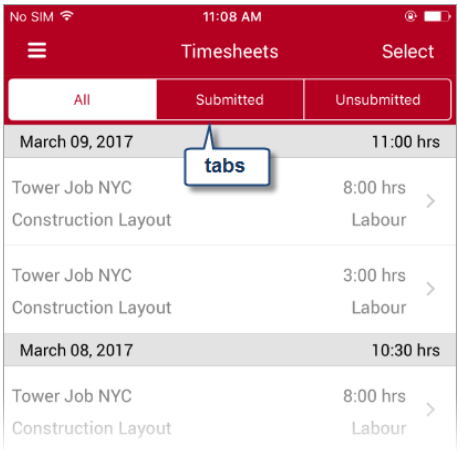


Tap the Menu icon ( ) to display the Main Menu.

Home

Tap the Home icon to display the Home screen, which is used for timesheet entry. This screen is documented in the Enter Timesheet section below.

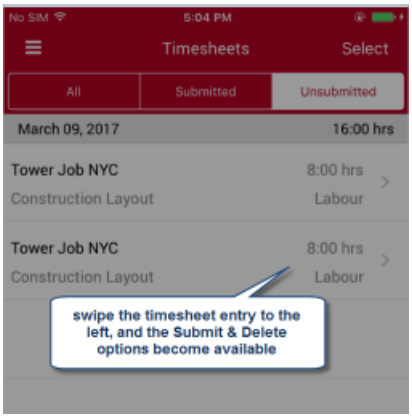
Timesheets

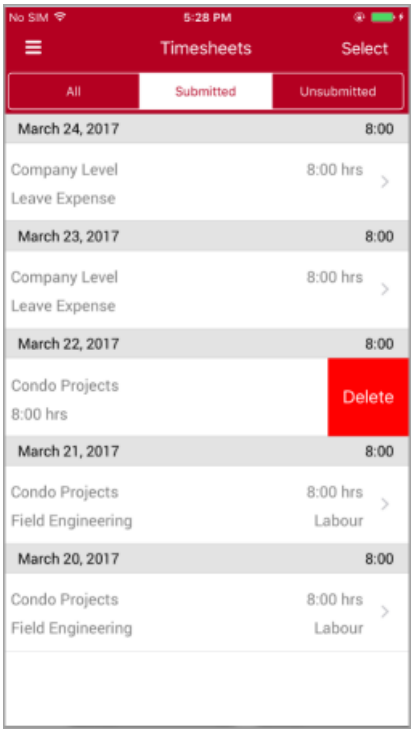


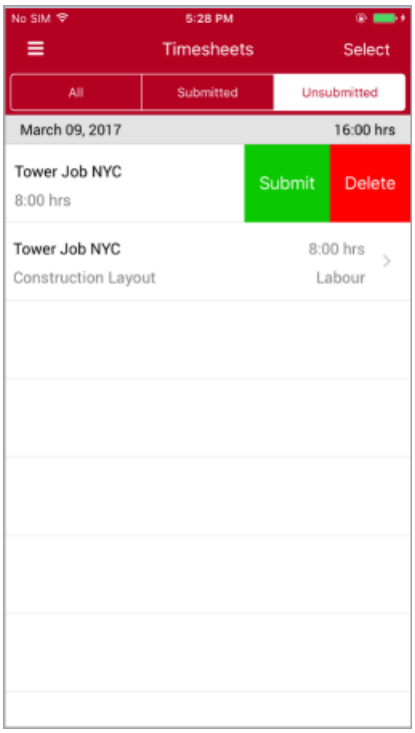
Tap the Timesheets menu option to display the Timesheets screen and view and perform actions on both submitted and unsubmitted timesheets.

Tap the All tab to view all timesheets, the Submitted tab to view submitted timesheets, and the Unsubmitted tab to view unsubmitted timesheets.

Submit or Delete Timesheets

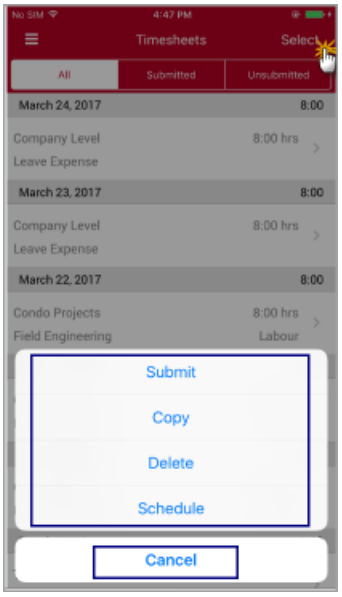




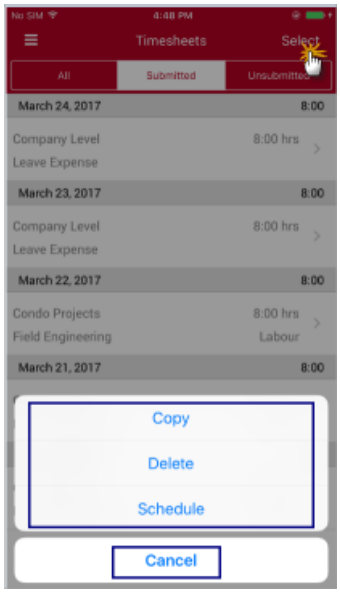


To delete a timesheet, swipe the timesheet row to the left, and the tap the [**Delete**] button. Unsubmitted timesheets can also be submitted by swiping the timesheet row and tapping the [**Submit**] button.

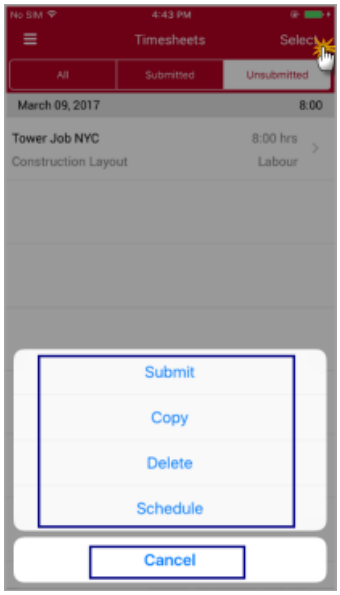
Timesheet Actions – Submit, Copy, Delete, and Schedule Timesheets



Timesheet Screen - All Tab Actions

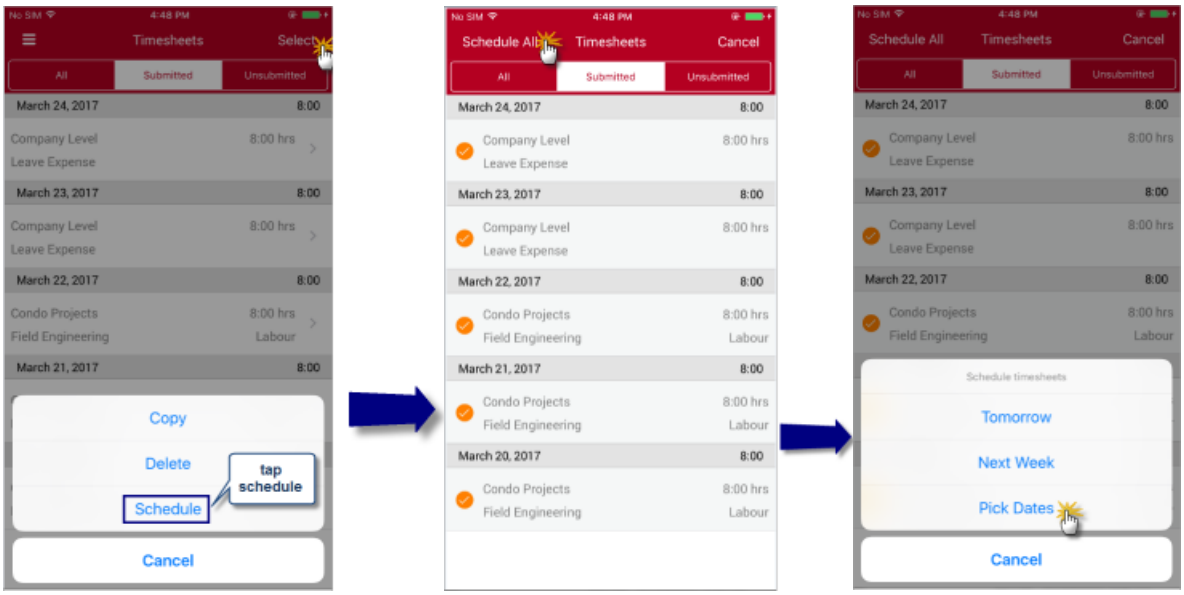


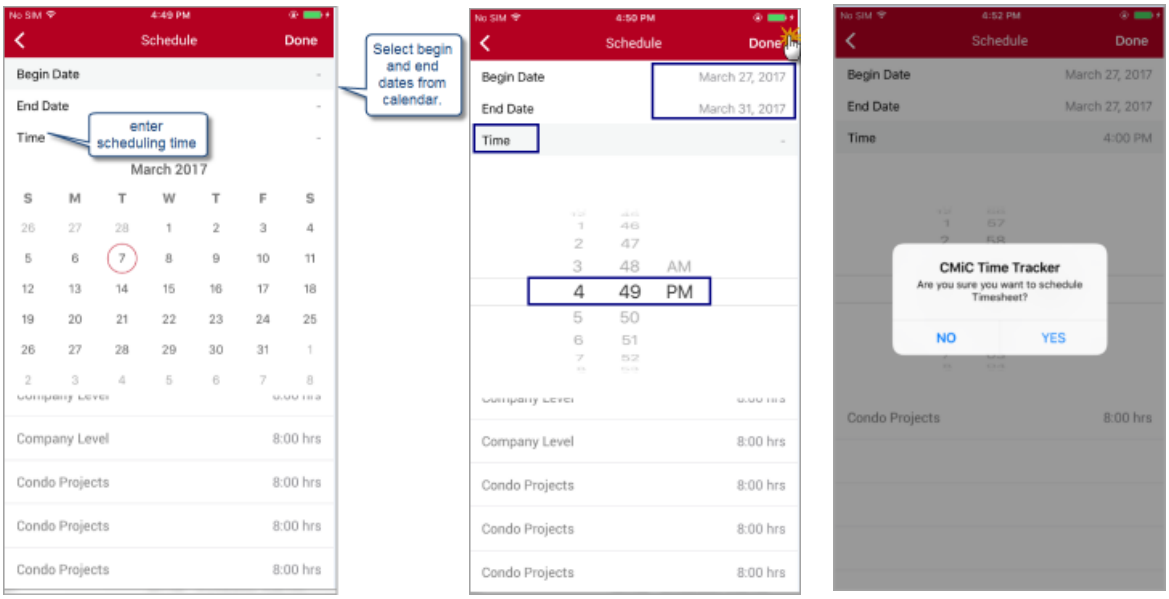
Submitted Tab Actions



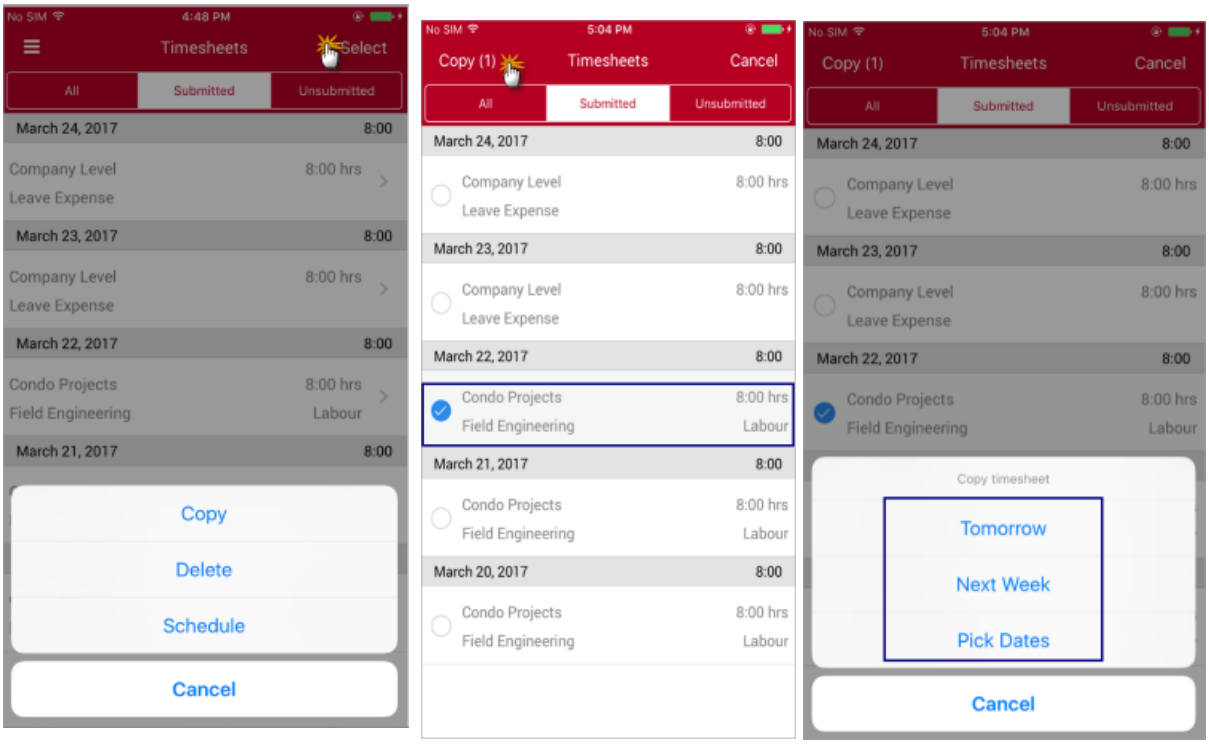
Unsubmitted Tab Actions

Each tab on the timesheet screen allows the user the submit, copy, delete, and schedule timesheets. These options are the same as the [**Copy Time**] button documented below in the Home screen (please refer to *Copy Timesheet to Future Days* section).





To copy timesheet entries to future dates, tap Schedule. Next, select the timesheets by checking manually to schedule to future dates. There is also the option to schedule all timesheets under the tab, by tapping the Schedule All option on the top-left corner of the Timesheet screen. In the popup, select either Tomorrow, Next Week, or Pick Dates, depending on which dates the new, copied timesheets are to be scheduled. Users should select the begin and end dates, and the scheduling time from the next popup screen. Then, tap the Done option to schedule and copy the timesheet to the scheduled dates and time.



Next 7 Days

Tap the Next 7 Days option to view timesheets scheduled for the week.

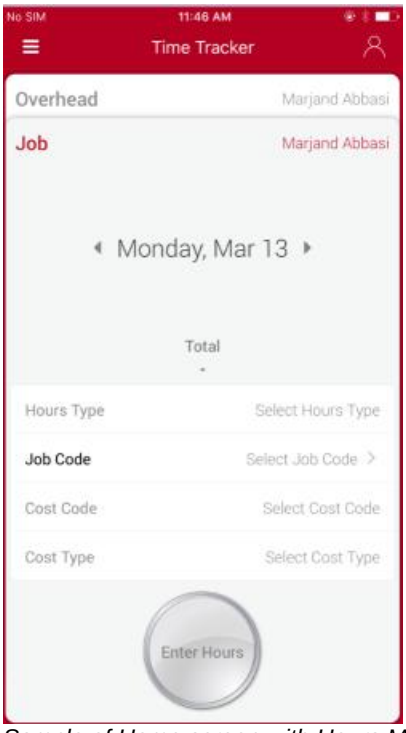
Clear Data

Tap the Clear Data option to delete all the locally saved data (e.g. saved jobs, overhead accounts, cost codes, cost types, and timesheets). This does not affect any data submitted to the Enterprise system.

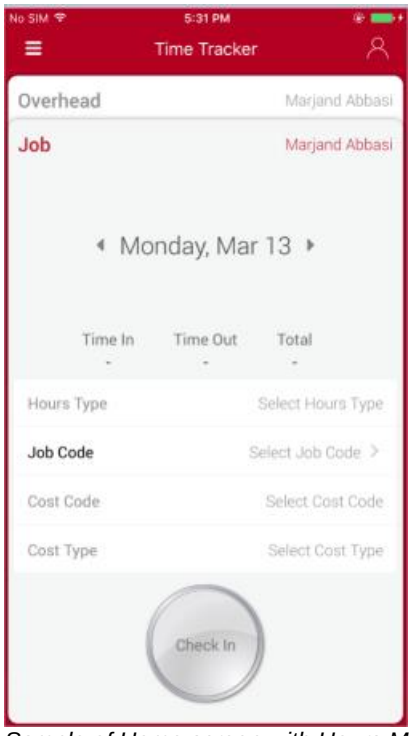
Logout

Tap the Logout option to disconnect the app from the CMiC Enterprise system and exit the app.

Enter Timesheet



Sample of Home screen with Hours Mode set to ON



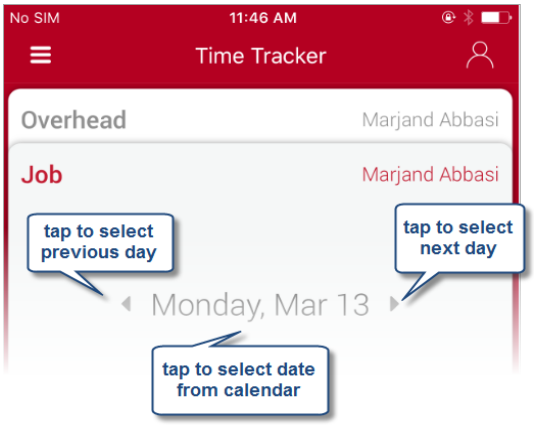
Sample of Home screen with Hours Mode set to OFF

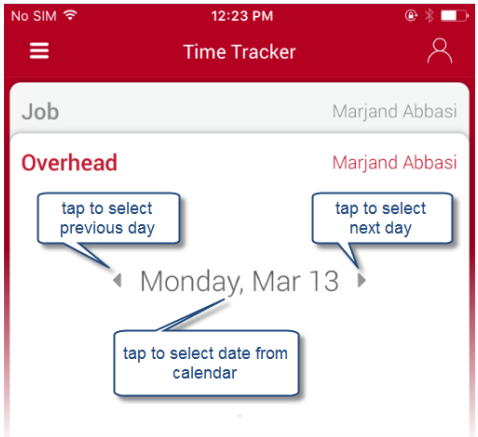
CMiC Time Tracker's Home screen is how timesheets are entered in Time Tracker. Entered timesheets can then be submitted to the CMiC E-Time system or saved locally on the device until they are ready to be submitted.

Either the total number of hours worked can or the Check In and Check Out times can be entered, depending on the setting of the Hours Mode toggle in the Settings app.

Select Parameters for Timesheet – Job and Overhead

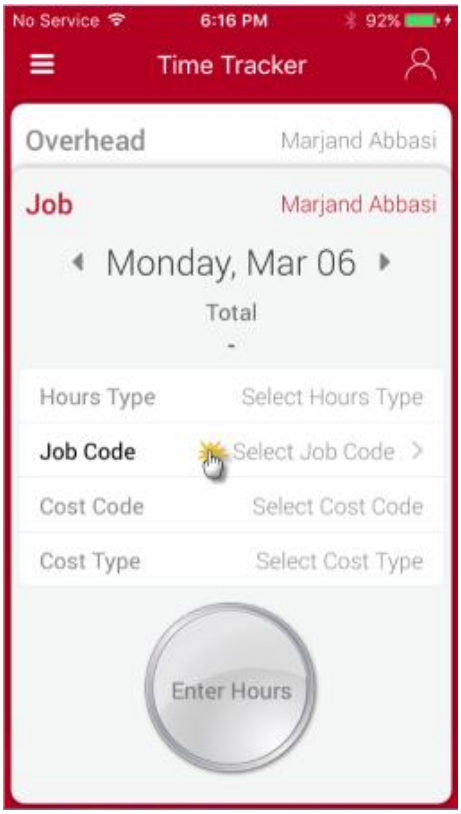
Select Date

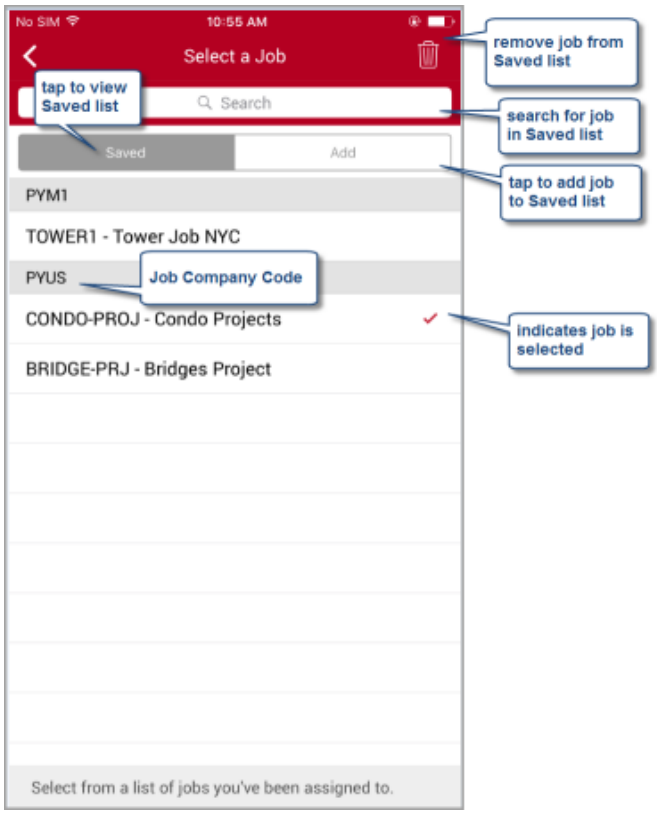




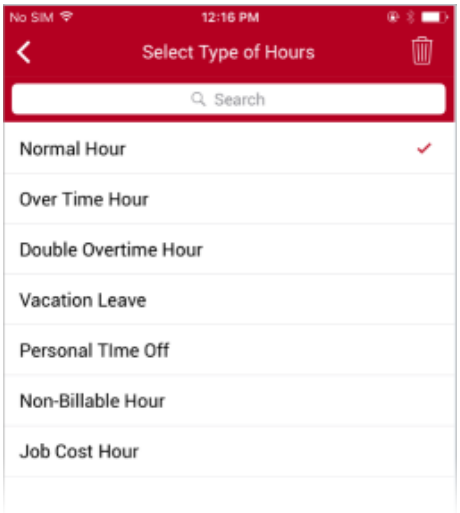
Select Job Code

On the Home screen, tap the Job Code row to display the Select a Job screen which lists all available job codes, grouped by their company code. The selected job is identified by a red checkmark. Jobs and departments are moved to the Saved tab of their respective screens after they are selected for the first time from the Add tab.



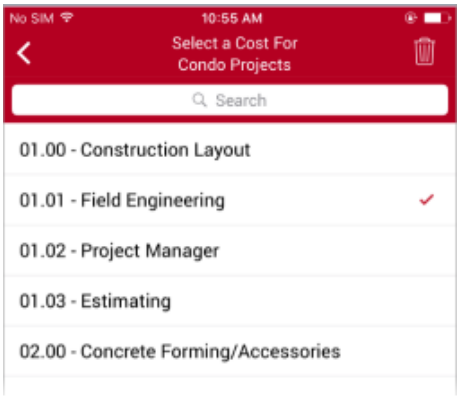


Select Hours Type



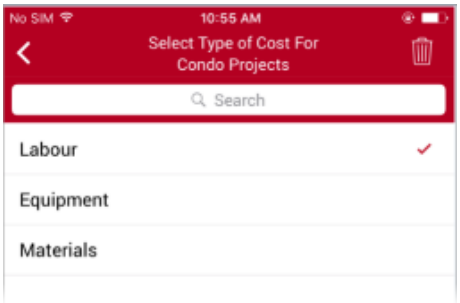
Once a job has been selected, tap the hours type row on the Home screen to display the Select Type of Hours screen. As shown in the above screenshot, the selected type is indicated by a red checkmark.

Select Cost Code



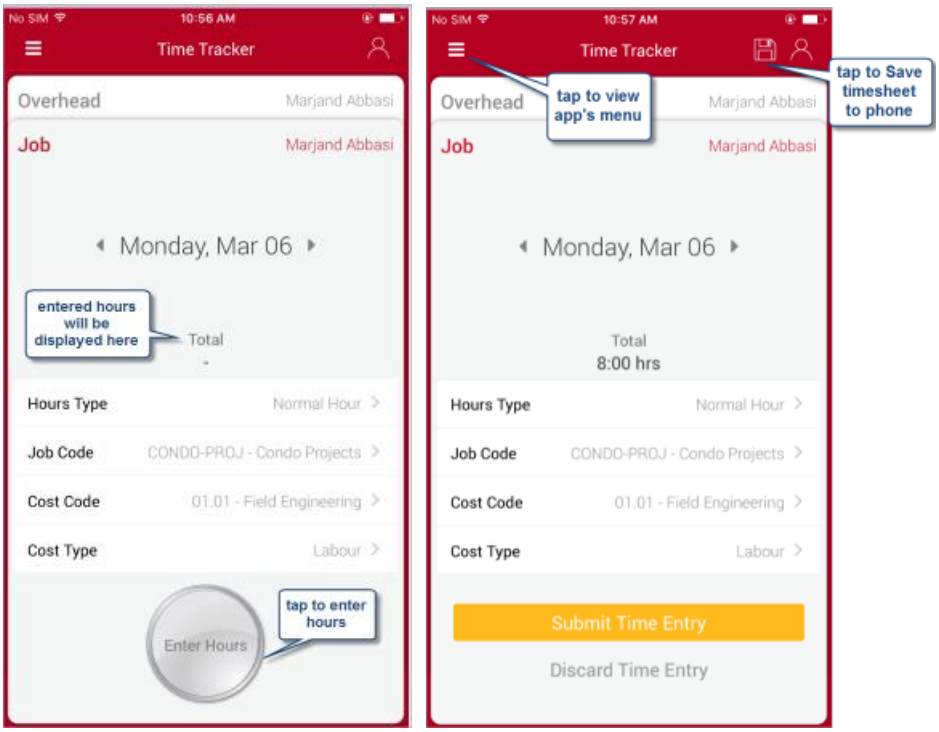
Tap the cost code row on the main screen and in the Select Cost Code screen, select the relevant cost code.

Select Cost Type



Tap the cost type row on the Home screen and in the Select Cost Type screen, select the relevant cost type.

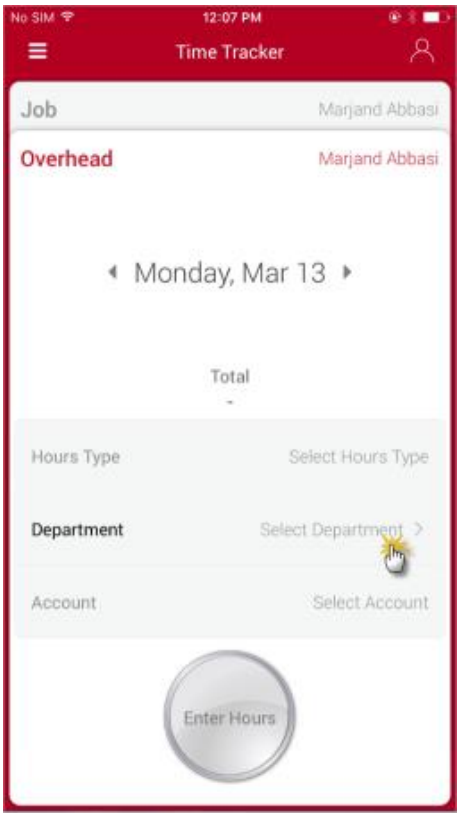
Enter Hours for Timesheet – Job

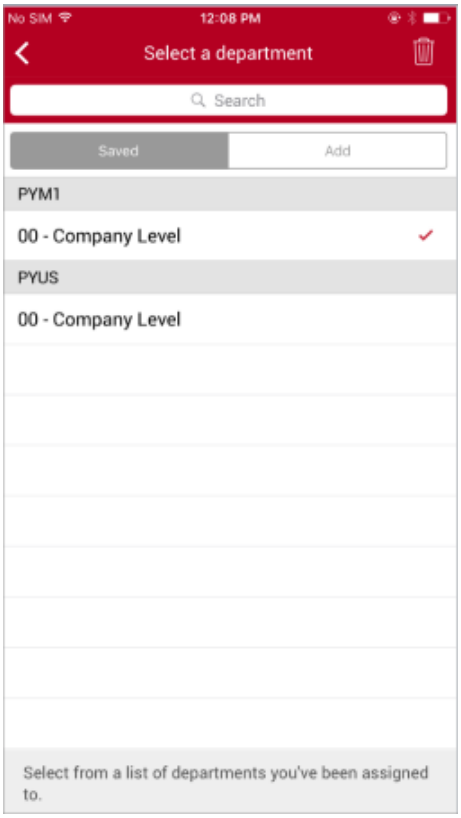


If the Hours Mode setting for CMiC Time Tracker is turned on, press the [**Enter Hours**] button to enter the number of hours worked.

Select Department – Overhead

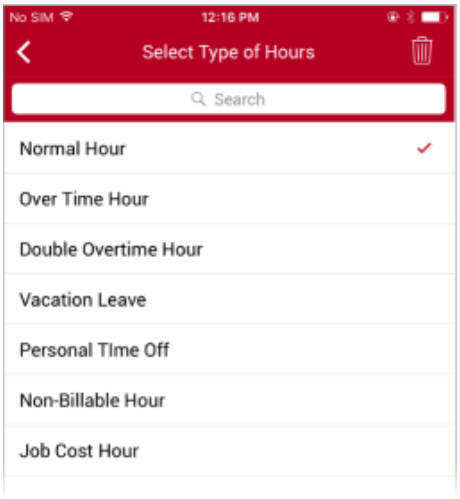
On the Home screen, tap the Department row to display the list of departments on the Select a Department screen:





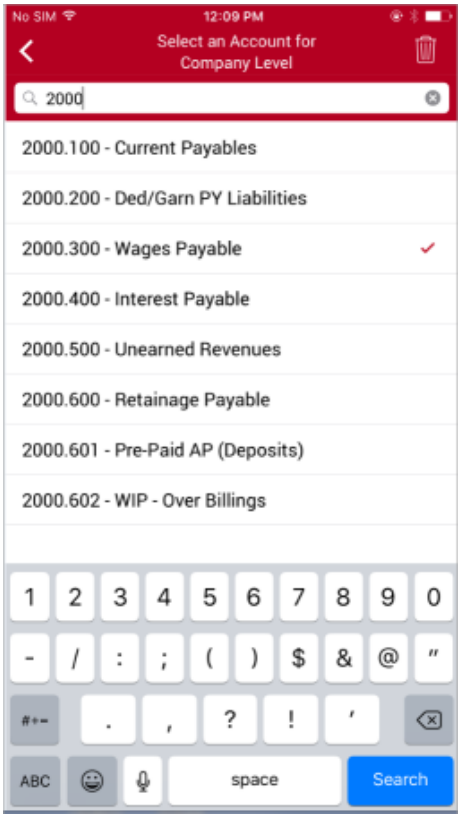
The Select a Department screen lists department codes and segments, grouped by company codes. The selected department is indicated by a red checkmark. To add a department to the Saved tab, tap the Add tab, then select the desired department.

Select Hours Type



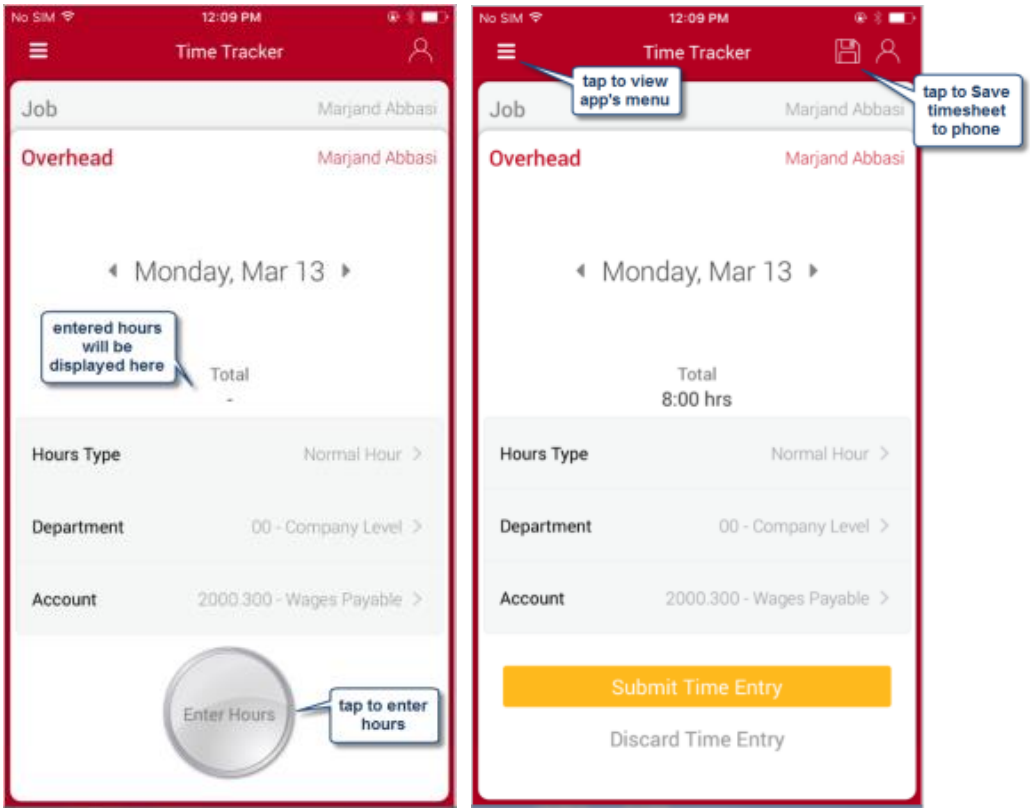
Once a department, tap the Hours Type row on the Home screen to display the Select Type of Hours screen. As shown in the above screenshot, the selected type is indicated by a red checkmark.

Select Account



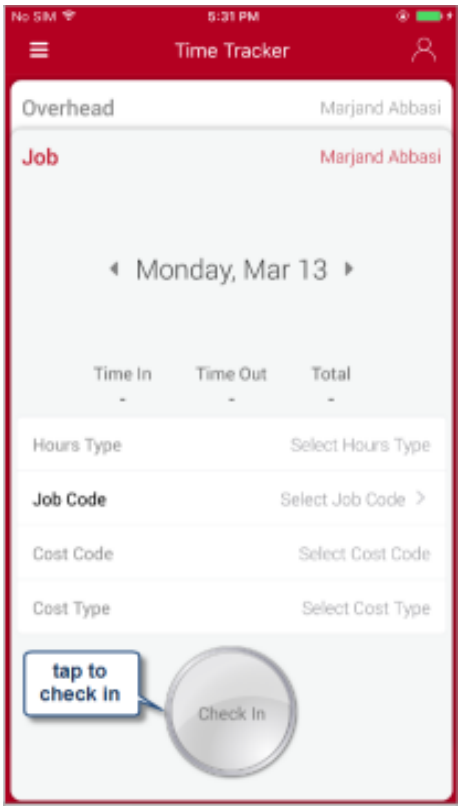
Tap the Account row on the main screen and in the Select an Account screen, select the relevant account number.

Enter Hours for Timesheet – Overhead

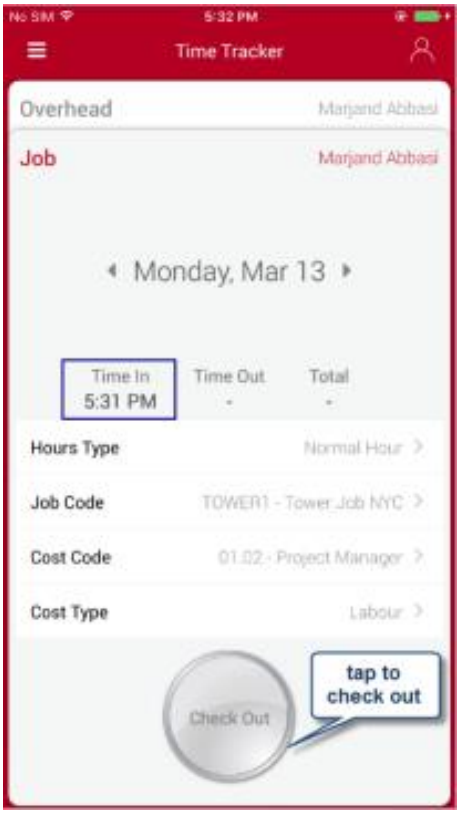


If the Hours Mode setting for CMiC Time Tracker is set to ON, the [**Enter Hours**] button is used to enter the number of hours worked. Tap the [**Enter Hours**] button and use the popup screen to select the number of hours and minutes worked.

Check In & Check Out Procedures



*Sample of Home screen with [**Check In**] button*



*Sample of Home screen with [**Check Out**] button*

If the Hours Mode setting for CMiC Time Tracker is set to off, the [**Check In**] and [**Check Out**] buttons are used to enter the check-in and check-out times, and to automatically determine the number of hours and minutes worked. For details about the Hours Mode setting, please refer to the preceding *Set Up CMiC Time Tracker* section.

First, ensure that the relevant job code, hours type, cost code, and cost type are all selected.

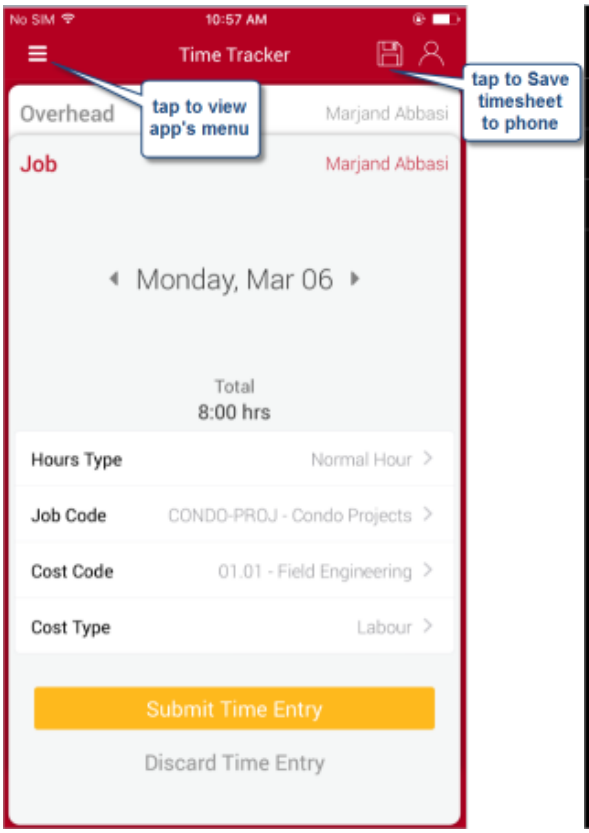
Check In

To check in, tap the circular [**Check In**] button. The check in time will be displayed by the Time In field, as shown in the above-right screenshot, and the [**Check In**] button becomes the [**Check Out**] button.

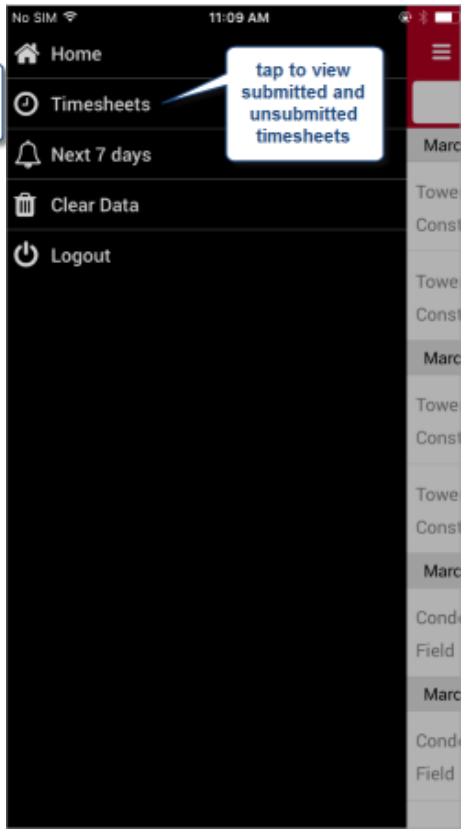
Check Out

To check out, tap the circular [**Check Out**] button. The check-out time will be displayed by the Time Out field, and the calculated time worked will be displayed by the Total field.

Save Timesheet to Smartphone



Sample of Home screen with completed timesheet

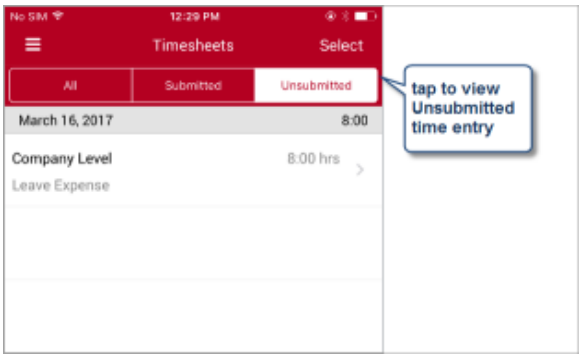


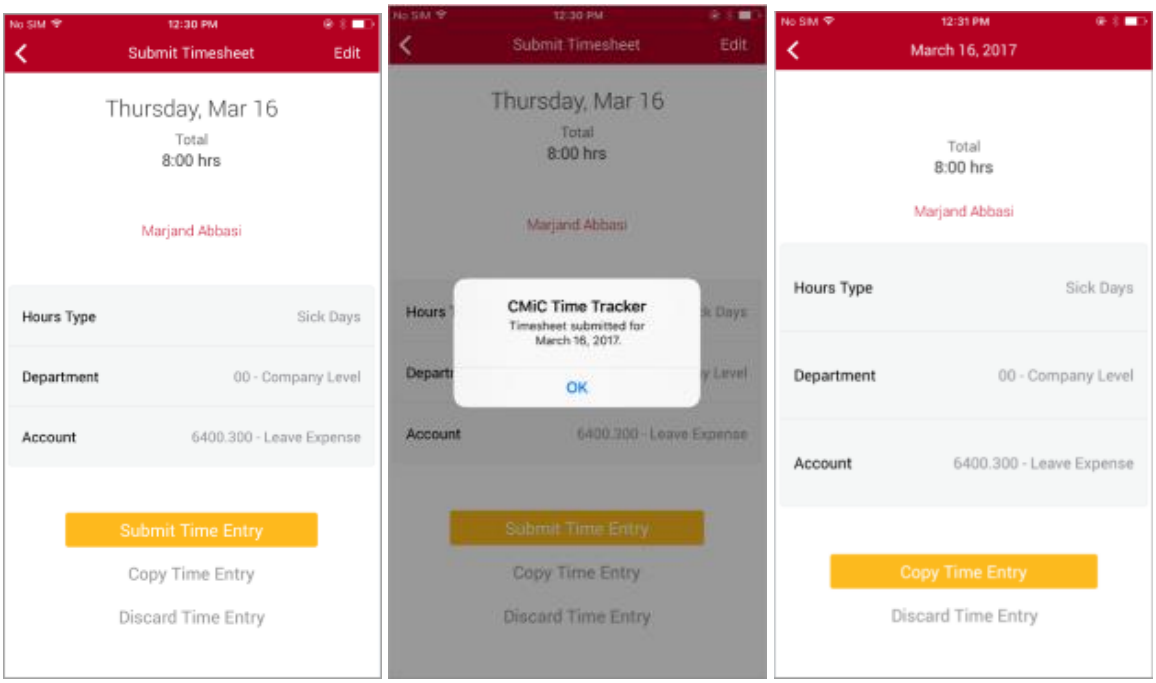
Sample of app's menu

Once a timesheet's entry is completed, it can be saved to the smartphone by tapping the Save icon ( ). Later, the saved timesheet can be accessed by tapping the Timesheets option in the main menu, as shown in the above-right screenshot. In the Timesheets screen, the unsubmitted timesheet can then be selected and submitted.

Submit, Copy, and Edit Time Entry – Timesheet Screen

Users can access saved timesheets by tapping the Timesheets option in the app's menu. In the Timesheets screen, unsubmitted timesheets can be selected to perform the Submit Time Entry or Discard Time Entry functions. Once a timesheet is submitted, it can be accessed on the Submitted tab. The Copy Time Entry and Discard Time Entry options are available to the user when the timesheet is viewed from the Submitted tab.

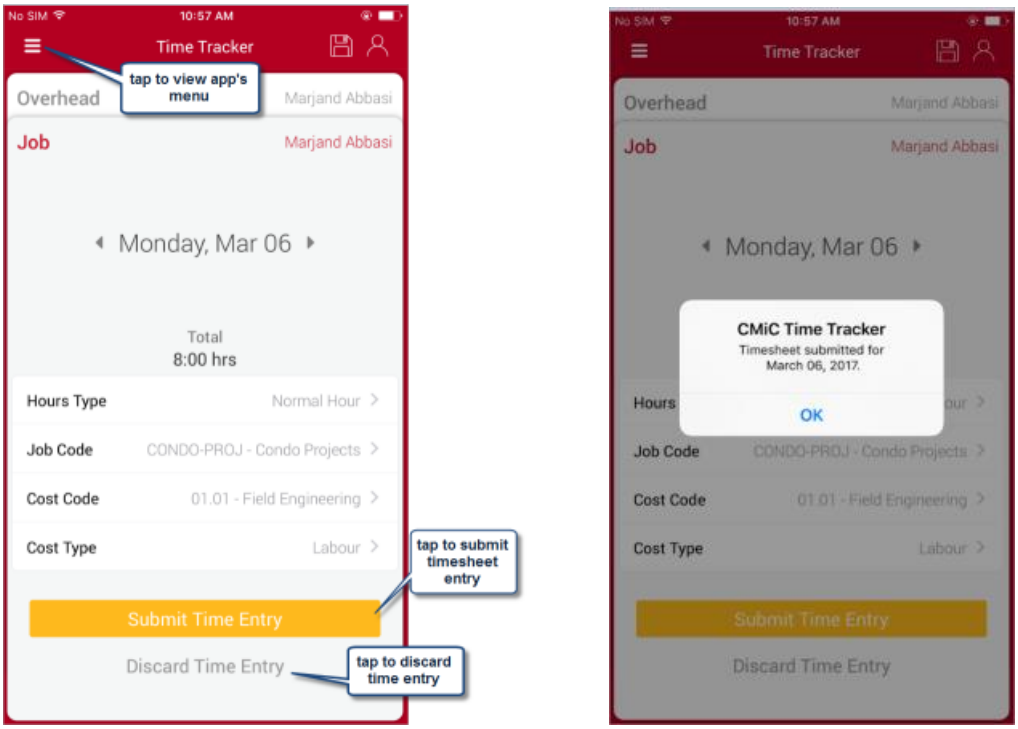




Sample of Unsubmitted Timesheet accessed via App's Menu on Timesheet Screen. Submit, Copy Time Entry, and Discard Time Entry options

Submit & Discard Unsubmitted Timesheet – Home Screen

If a timesheet is unsubmitted, it can be discarded by tapping the Discard Time Entry option on the Home screen.



Sample of Home screen with completed timesheet.

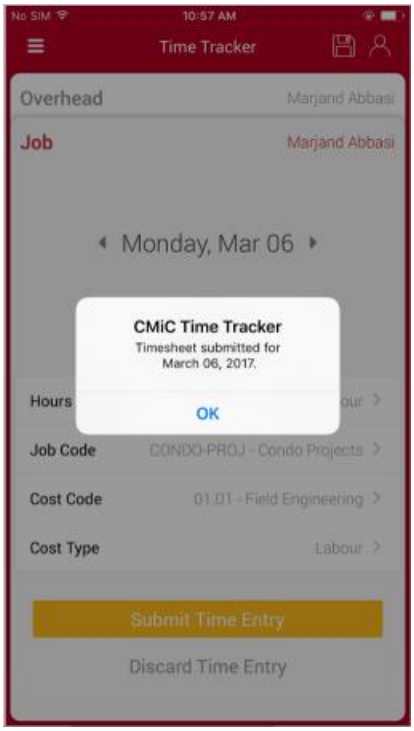
Once a timesheet's entry is completed, the Submit Time Entry and Discard Time Entry options become available. To submit the timesheet to the CMiC E-Time system, tap the Submit Time Entry option.
If required, the submitted timesheet can be viewed through the Timesheets screen, which can be accessed by tapping the Menu icon ( ).

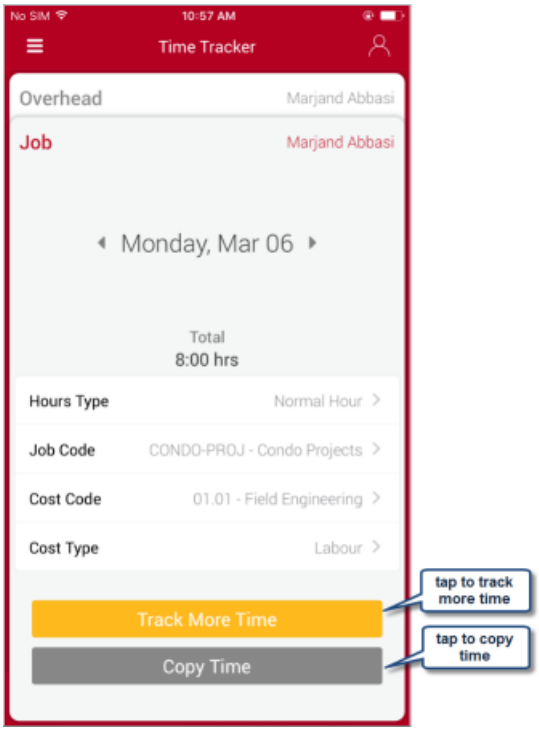
Track More Time & Copy Time – Home Screen

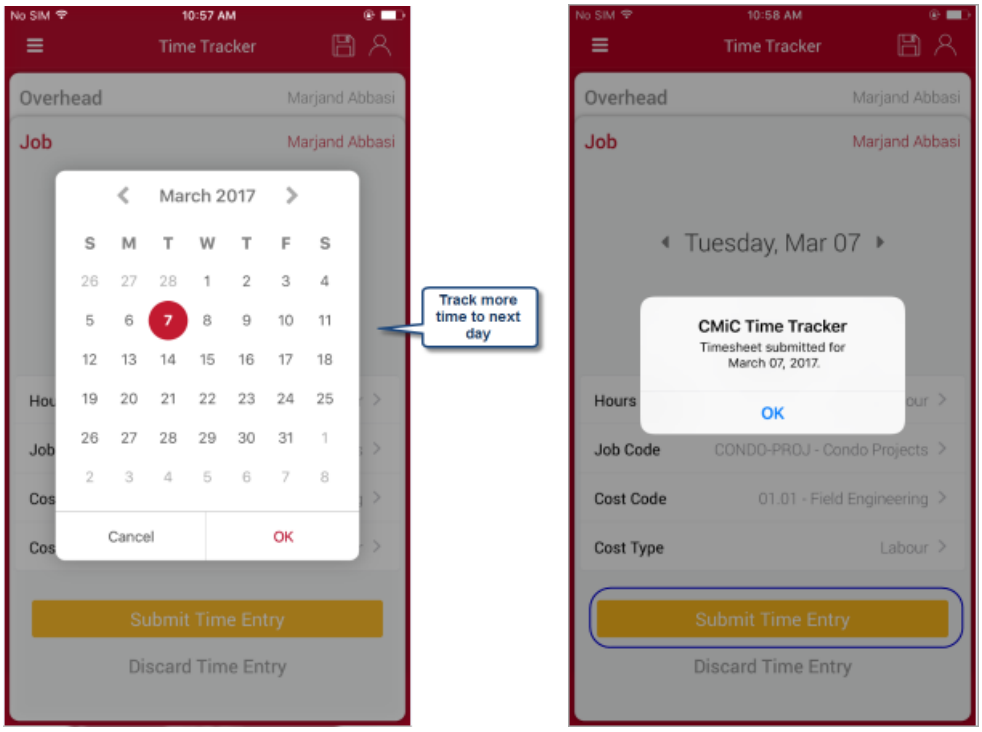
The Track More Time and Copy Time options become available on the Home screen when a user submits or saves a timesheet.

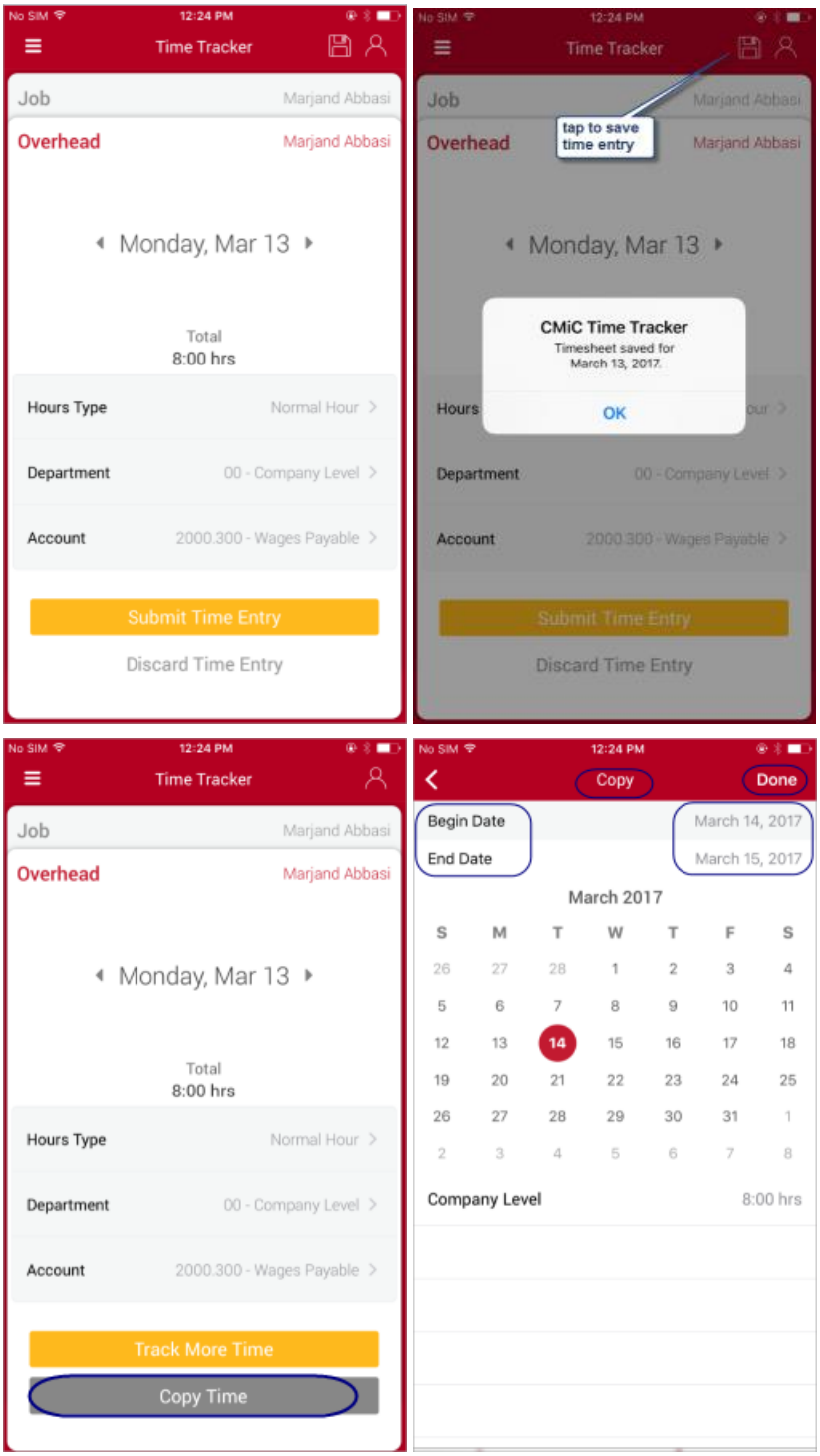
To Track More Time via the Home screen, tap the Track More Time option to enter and complete a timesheet, with a different hour type if necessary, for the same day or the next day.

Once timesheet entry is complete using either of the above options, the Submit Time Entry and Discard Time Entry options become available for the timesheet entered using the above options.






No SIM
10:57 AM
Time Tracker
Overhead
Marjand Abbasi
Job
Marjand Abbasi
March 2017
S M T W T F S
Cancel
OK
Submit Time Entry
Discard Time Entry
Track more time to next day
No SIM
10:58 AM
Time Tracker
Overhead
Marjand Abbasi
Job
Marjand Abbasi
Tuesday, Mar 07
CMiC Time Tracker
Timesheet submitted for March 07, 2017.
OK
Hours
Job Code
CONDO-PROJ - Condo Projects
Cost Code
01.01 - Field Engineering
Cost Type
Labour
Submit Time Entry
Discard Time Entry



The Track More Time and Copy Time options become available on the Time Entry Home screen after a timesheet is saved.

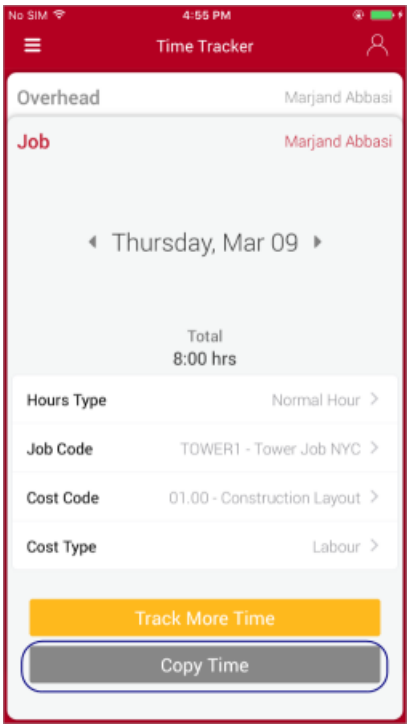
Tap on Copy Time to copy timesheet to future dates.

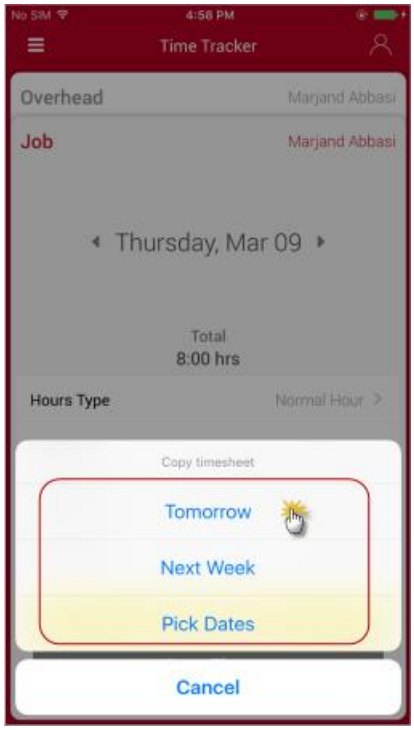
Copy Time to Future Days – Home Screen

After a timesheet is submitted, the [**Copy Time**] button can be used to copy the timesheet to future dates so that you do not have to re-select the Hours Type, Job Code, Cost Code, and Cost Type fields for those future entries. The following sections provide details about the three options available for the Copy Time function when timesheet is submitted.

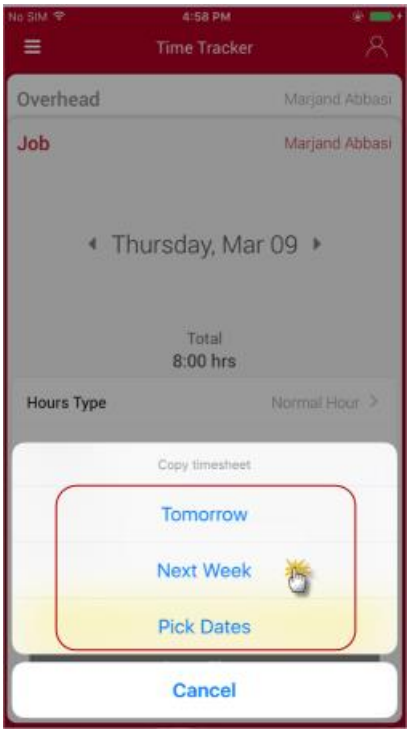
NOTE: Track More Time and Copy Time options are also available when timesheets are saved. The option will deliver a calendar date range to select from.

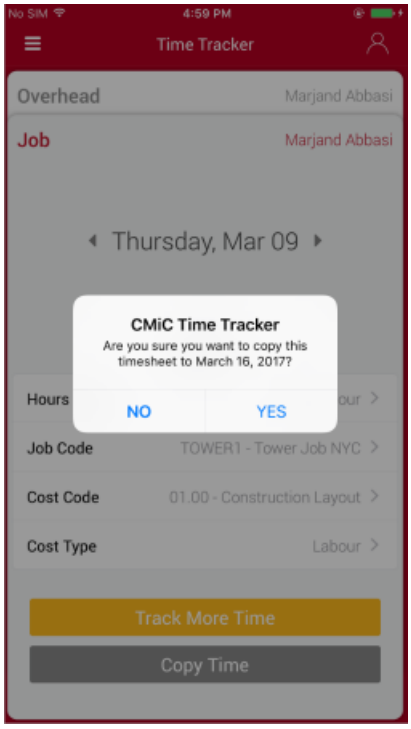
Tomorrow, Next Week, and Pick Dates



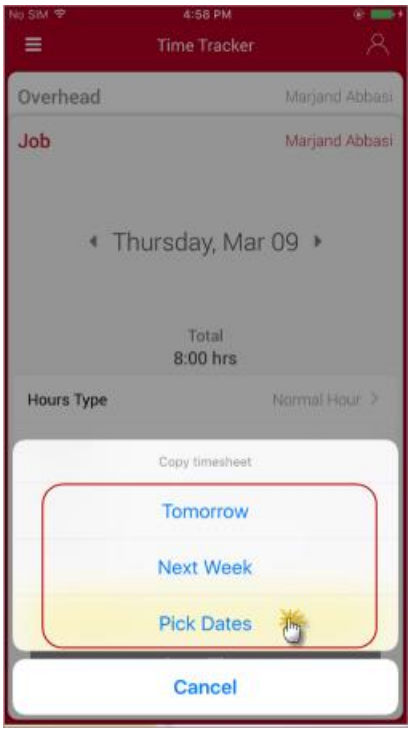


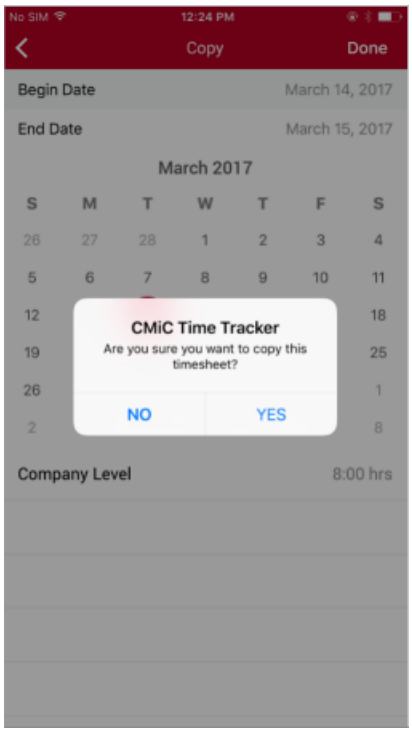
Tap the [**Copy Time**] button and select "Tomorrow" in the popup. In the confirmation popup, tap the [**Yes**] button and the application will copy the current timesheet to a new entry for tomorrow's date.





Tap the [**Copy Time**] button and select "Next Week" in the popup. In the confirmation popup, tap the [**Yes**] button and the application will copy the current timesheet to an entry for the date that is 7 days away from the current timesheet's date.

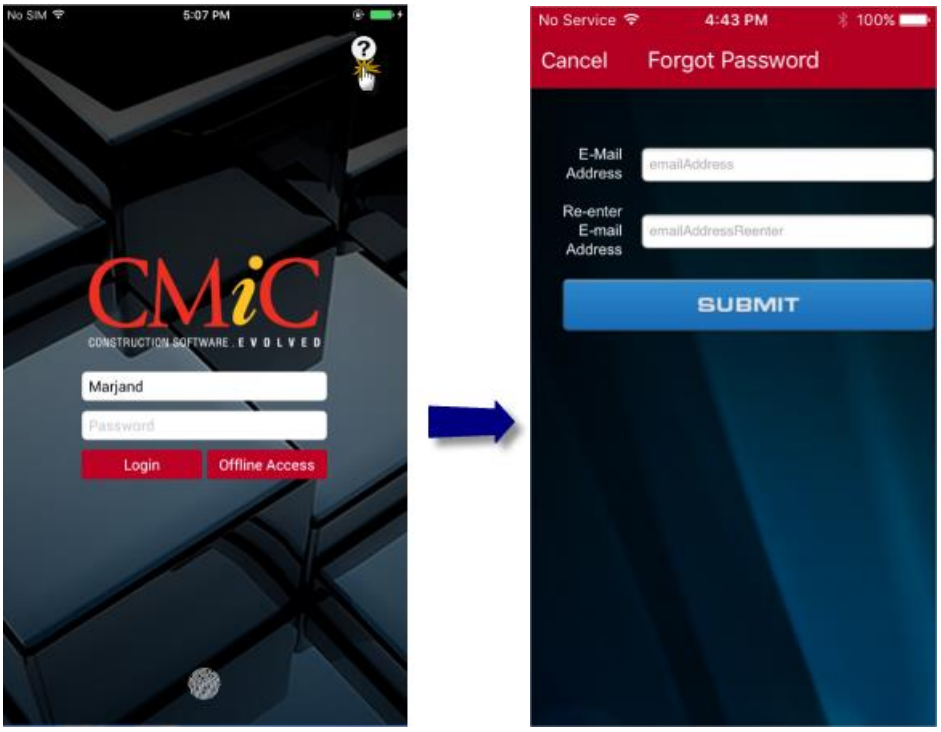




Tap the [**Copy Time**] button and select "Pick Dates" in the popup. In the Copy Timesheet screen, select the range of dates for which copied timesheet entries will be created, and tap the [**Done**] button.

Forgot Password

If the password for the Time Tracker app is lost or forgotten, the Forgot Password option on the Login screen can be used to create a new one.



Tap the Question icon (?) to open the Forgot Password screen. On the Forgot Password screen, enter the user email address entered on the CMiC E-Time system, re-enter it for verification purposes, then tap the [**Submit**] button. An email with a password reset URL is then sent to the provided email address:

A request has been made to recover the username and password for your CMIC account.

User Name: MARJAND

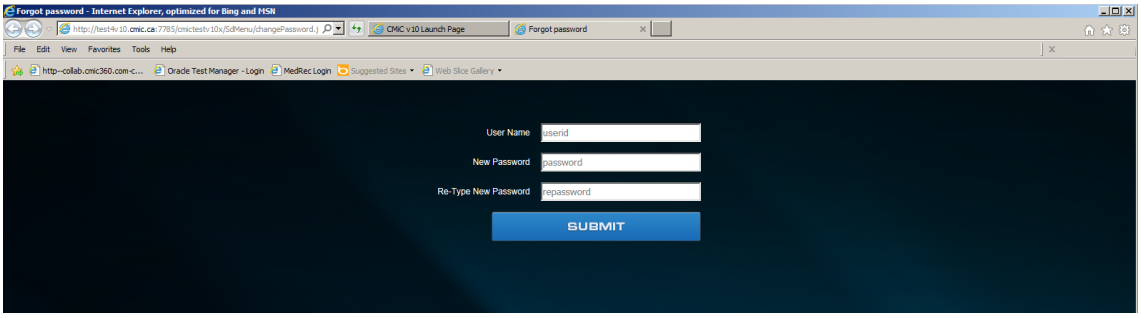
To change your password please click on:
http://test4v10.cmic.ca:7785/cmictestv10x/Sdmenu/changePassword.jsp?id=464142782271499071569

This link will expire in one hour, after that you will have to send a new request.

Sincerely,

The Support Team

Opening the link opens the password reset page:


Forgot password - Internet Explorer, optimized for Bing and MSN
CMiC v10 Launch Page
Forgot password
File Edit View Favorites Tools Help
User Name
userid
New Password
password
Re-Type New Password
repassword
SUBMIT

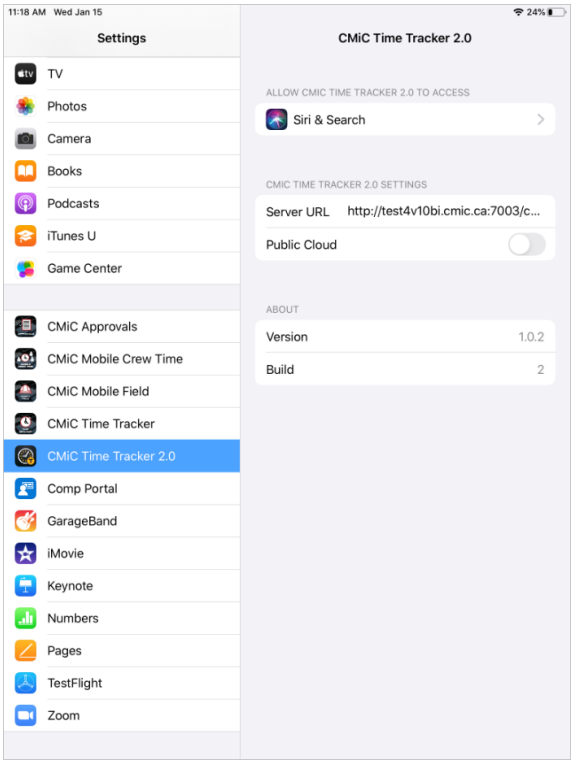
CMiC Time Tracker 2.0

Overview – CMiC Time Tracker

The CMiC Time Tracker app can be used to enter hours worked and submit timesheets into the CMiC E-Time system. Time can be entered against a particular job or as overhead.

The following section details correct setup and use of the Time Tracker 2.0 app for iPhone.

App Settings



Server URL

Enter the URL for the mobile server being used for the Time Tracker app. CMiC Cloud clients should enable the Public Cloud setting rather than entering a URL into this field.

Public Cloud

Tap this toggle to use the public cloud server for Time Tracker. This setting should be turned on for CMiC Cloud clients, as it turns on the multitenancy mode. When turned on, the Server and Environment fields are automatically filled in, and a tenant ID will be required by the login screen.

MDM Setup for CMiC Time Tracker – iOS

For MDM portals, the XML tags that the CMiC Time Tracker 2.0 app supports are:

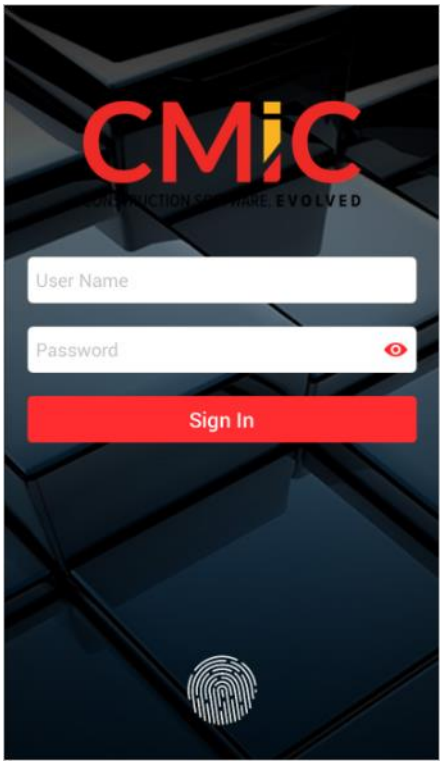
- EnvironmentURL – for server URL

For example:

```
<dict>
  <key>EnvironmentURL</key>
  <string>http://test4v10bi.cmic.ca:7003/cmictestv10x</string>
</dict>
```

NOTE: The string would be the customer's mobile server and application database. For example: test4v10bi server and database is cmictestv10x: http://test4v10bi.cmic.ca:7003/cmictestv10x.

Login Screen

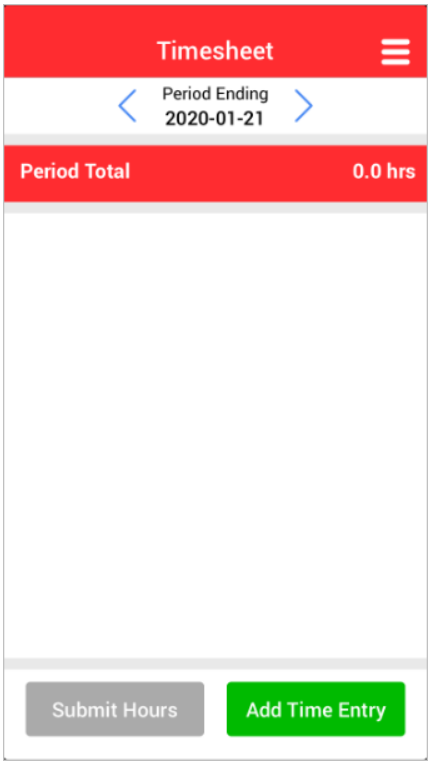


The Login screen is what appears when opening the Time Tracker app for the first time. The screen will prompt the user for a username and password. If using the public cloud server (i.e. if the Public Cloud toggle is switched on in the App Settings screen), then the user will be asked for a tenant ID, username, and a password.

To set up Touch ID for Time Tracker, a fingerprint should be registered through the Touch ID & Passcode screen in the Settings app by pressing the Add a Fingerprint… link.

NOTE: Users must be set up with an E-Time Access Code, and they must have a Single Sign-On user ID to log in to CMiC Time Tracker.

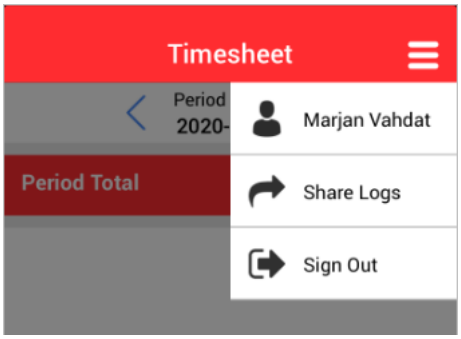
Timesheet Screen



The Timesheet screen is the main screen of the Time Tracker 2.0 app. From this screen employee timesheets can be added and submitted.

Press the blue arrows to navigate between pay periods and press the Period Total bar to show or hide a breakdown of entered hours for the currently selected pay period.

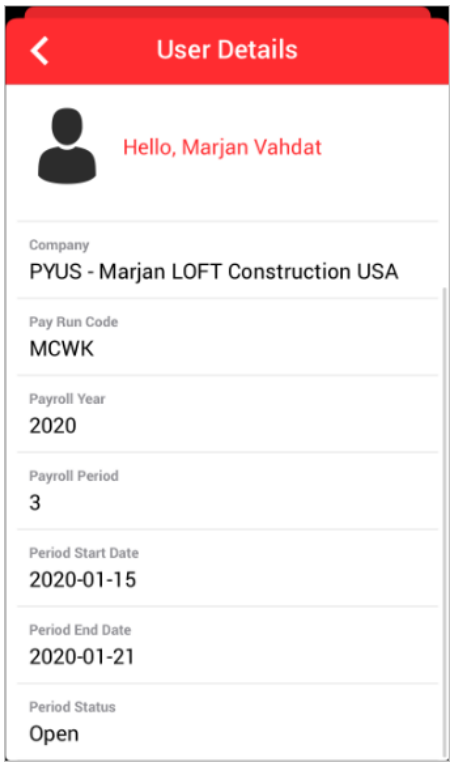
Menu Icon ( )

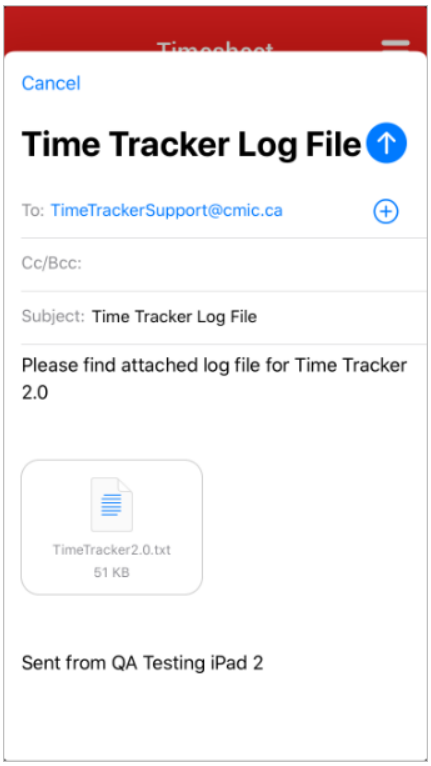


Press this icon to bring up the main menu, as shown above.

Press the User icon ( ) to show the User Details screen, as shown below. This displays the company, pay run, current payroll year and period, period start and end dates, and the status of the period. This screen is display only and the information displayed can't be edited here.

Press the Share Logs icon ( ) to bring up the screen shown below. From here the user can send an email attached with a txt file containing the log information for all entered timesheets.

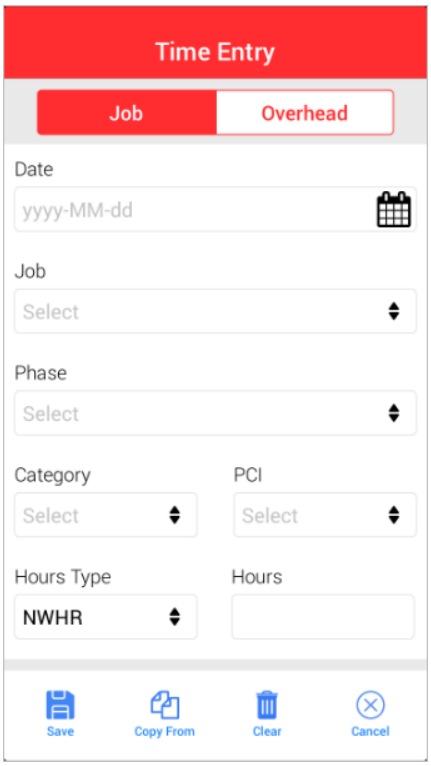


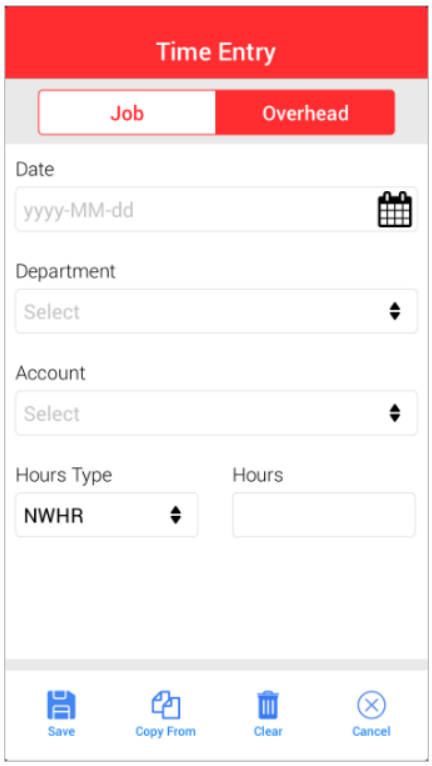


Press the Sign Out icon ( ) to sign out the currently logged-in user and return to the Login screen.

Entering Timesheets

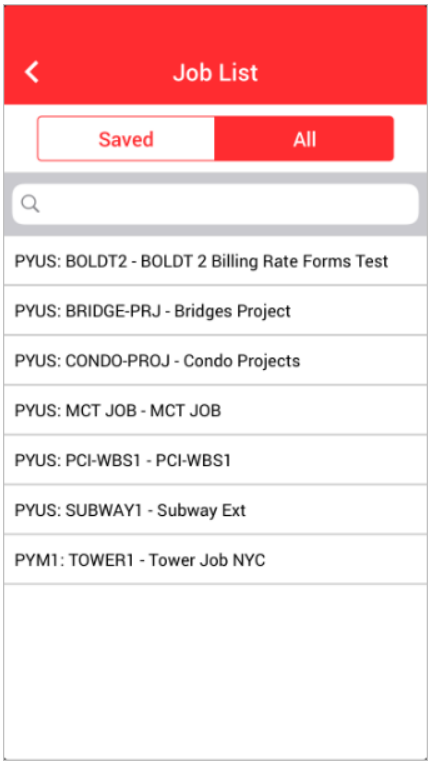
Press the [**Add Time Entry**] button on the Timesheet screen to enter time worked for the user. Time can either be entered against a job or an account by tapping the Job or Overhead tabs, respectively.





If entering time against a job, select the job code, phase, category, PCI, and type and amount of hour being entered. For overheads, select the department, account, and type and amount of hour being entered.

Tapping any of these fields will show a screen like the one shown below for job codes.



The All tab lists all codes available for the user. Upon selecting a code for the first time, that code will then appear in the Saved tab for future timesheet entries.

Save ( )

Press this icon to save the timesheet entry. The app will only allow a timesheet to be saved once all fields on either the Job or Overhead tab have been filled.

Copy From ( )

Press this icon to copy time entered from one day to another. Pressing this icon brings up a monthly calendar from which the user should select the timesheet to copy. Another monthly calendar then appears from which the user should select the day to enter the copied timesheets. The fields of the Time Entry screen will then populate with the copied data.

Please note that the Save icon should still be pressed after copying a timesheet from one day to another.

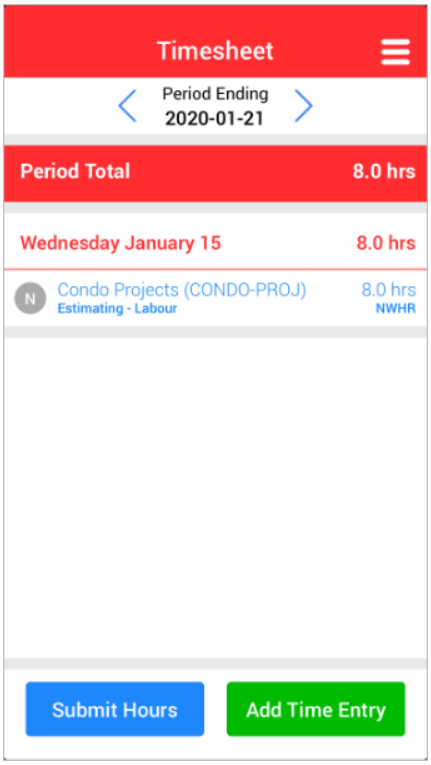
Clear ( )

Press this icon to clear all data entered for the current timesheet.

Cancel ( )

Press this icon to return to the main Timesheet screen.

Once a timesheet entry has been saved it still needs to be submitted. This can be achieved by pressing the [**Submit Hours**] button which turns blue if there are outstanding timesheets that have yet to be submitted.



Once a timesheet is submitted it can be opened, but not edited or deleted.

CMiC Pay Stub

Overview

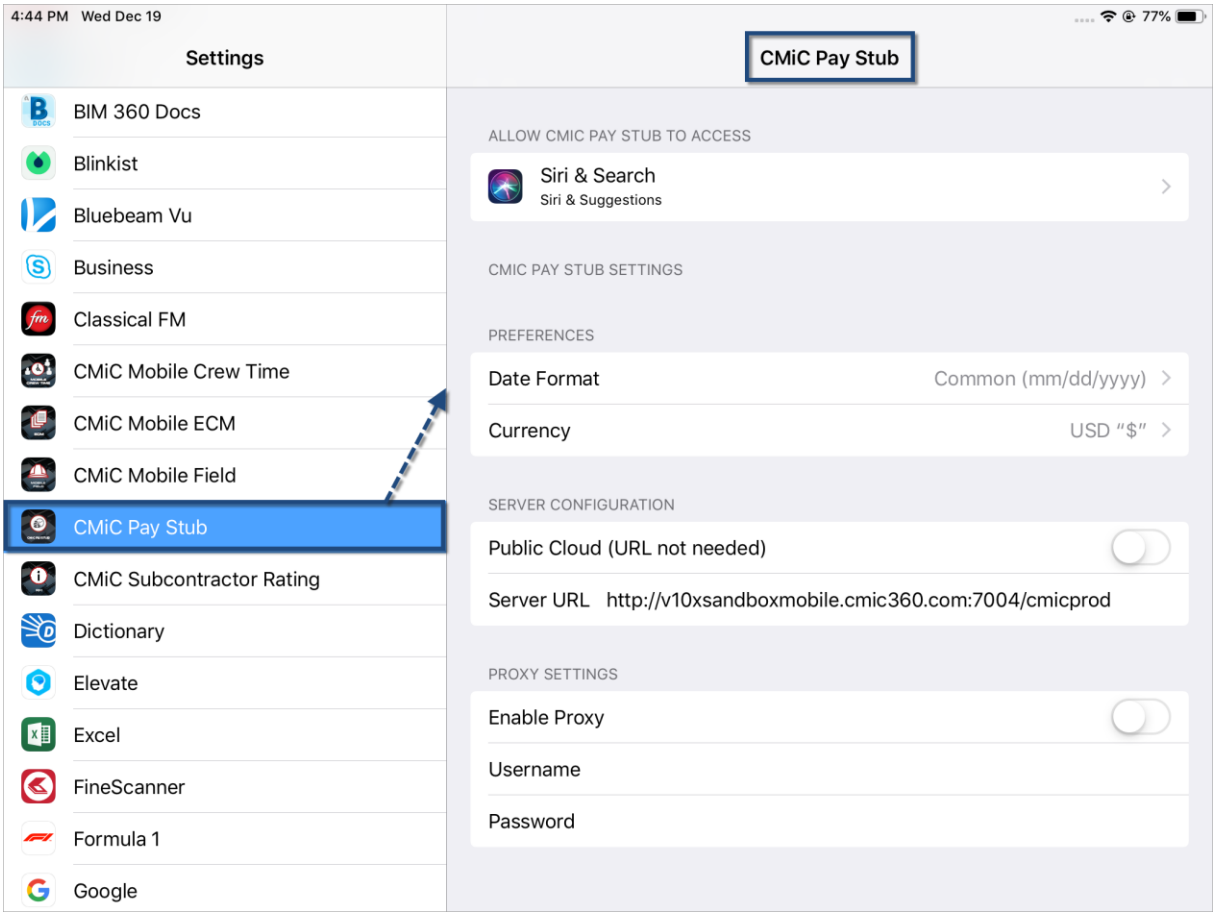
CMiC Pay Stub is a mobile app for the Employee Self Service (ESS) pay stub printing program. This app provides a convenient way for employees to view their latest stub details or review past stub details, as the app stores up to six months of available pay periods.

Prerequisites

Before CMiC Pay Stub can be used, the following prerequisites must be met:

1. Verify the employee is a registered user of the Employee Self Service (ESS) module. The Single Sign-On (SSO) username and password used to log in to the ESS module is the same one used to log in to the CMiC Pay Stub app.
2. Ensure that the checkbox ‘Show Stub on ESS’ is checked on the Pay Periods screen of the Payroll module (standard Treeview path: *US Payroll > Setup > Company > Pay Periods*).
3. Determine if the alternate feature setting will be enabled via database to display leave balances for eligible and accrued leaves on CMiC Pay Stub app. If enabled, an additional two settings must be set on the Leaves Master screen in the Payroll module (standard Treeview path: *US Payroll > Administration > Leaves > Master*):
    a. Select “View Only” or “View and Request” in the Accessible In Employee Self Service field to allow leave details to be viewed in ESS.
    b. Check ‘Show Leave on Pay Check And Pay Stub’ box.

App's Settings – iPad



The iPad's Settings screen, launched by tapping the Settings icon , is used to configure CMiC Pay Stub and to set user preferences.

To configure CMiC Pay Stub, navigate to and tap the CMiC Pay Stub settings bundle, framed by the blue rectangle in the above screenshot. On the screen's right pane, the settings for the app are displayed in sections. Information about the settings under these sections are provided by the following, corresponding sections.

PREFERENCES

Date Format

Set how the date will be displayed in the app.

Currency

Set the currency symbol to be used by the app. The default symbol is the dollar sign "$".

SERVER CONFIGURATION

Public Cloud (URL not needed)

If you are a CMiC Cloud client, this setting must be turned on, as it turns on the multitenancy mode (**Tenant ID** will be required by login screen). Also, the **Server URL** is not applicable, as the database server and environment are automatically provided by the app.

Server URL

Enter the URL for your company's mobile server. If you are a CMiC Cloud client, enable the **Public Cloud** setting (the **Server URL** is not applicable).

PROXY SETTINGS

Enable Proxy

This Proxy Settings section is used if you are using a proxy server to connect to the internet. If a proxy server is being used, set this setting to **ON**, and enter the username and password for the proxy server.

Username (Proxy Server)

Username for proxy server.

Password (Proxy Server)

Password for proxy server.

Login Screen

Sample of Enterprise's Login screen

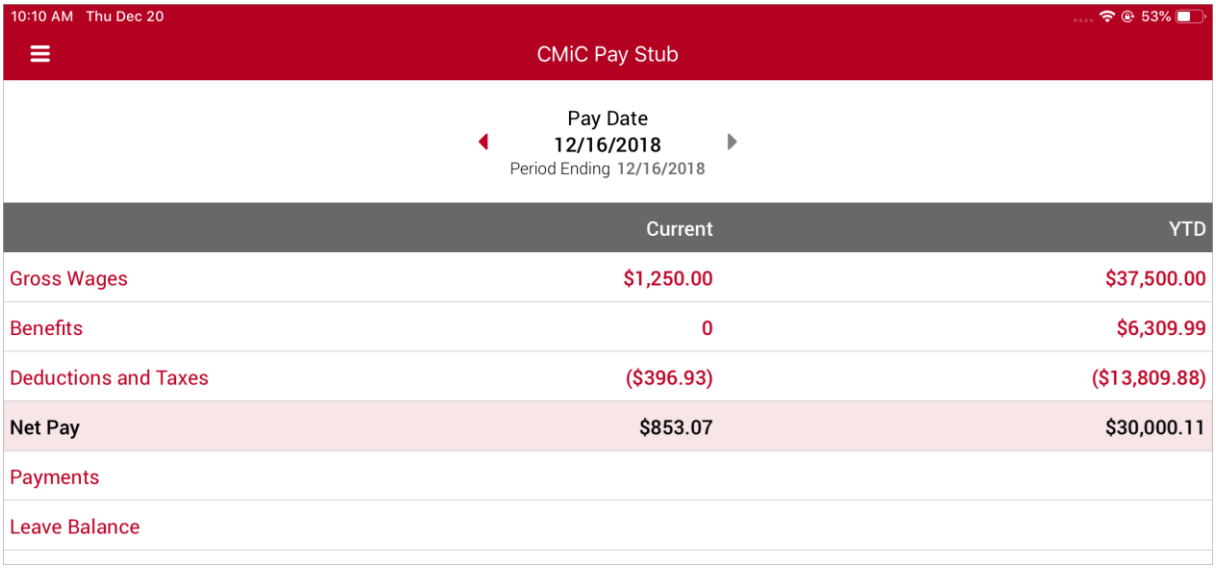
Log in using your SSO user ID and password. This is the same username and password you use to log in to the ESS module. If you are a CMiC Cloud client, provide your tenant ID as well.

[**Offline Access**] – Button

This button is used to start the application to view pay stubs when there is no internet connection.

In Offline mode, pay stubs can be viewed that have been previously saved on the device. When the application detects an internet connection, it will automatically upload new pay stubs.

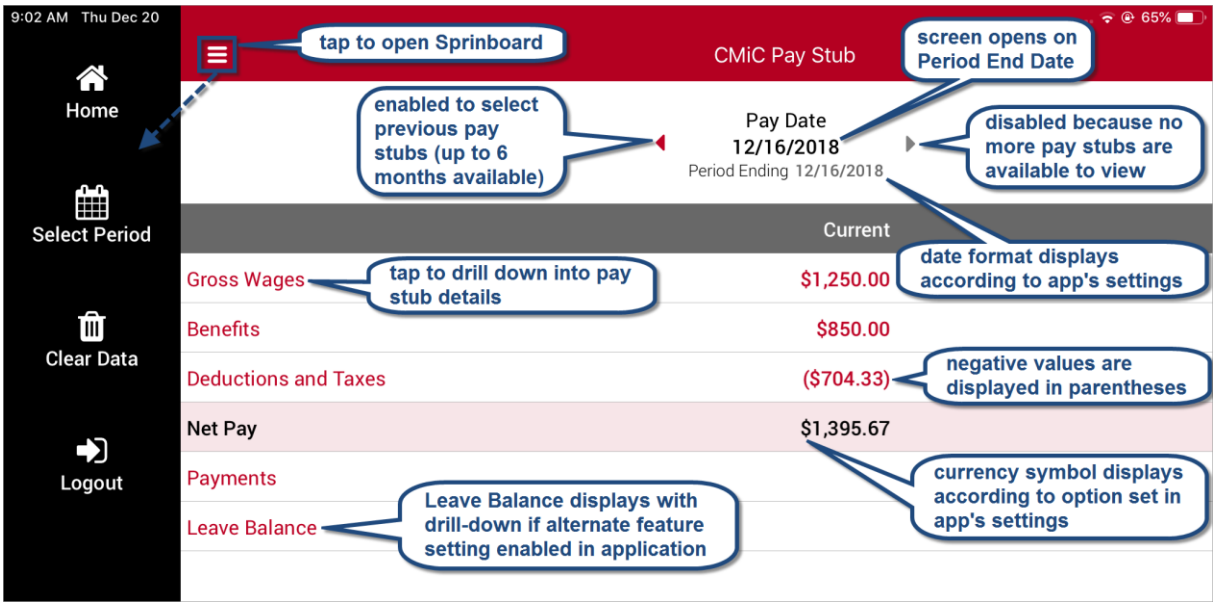
Pay Stub – Screen



Pay Stub screen

When a user successfully logs in to the CMiC Pay Stub app, the Pay Stub screen is displayed showing the current pay stub and pay date. There are several ways to view pay stub details, as described in the sections that follow.

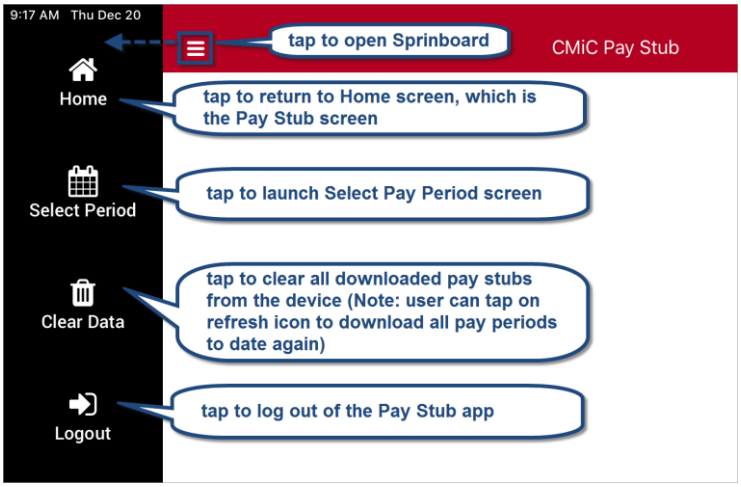
Pay Stub Components



Pay Stub screen with its Springboard

The screenshot above illustrates the Pay Stub screen's components.

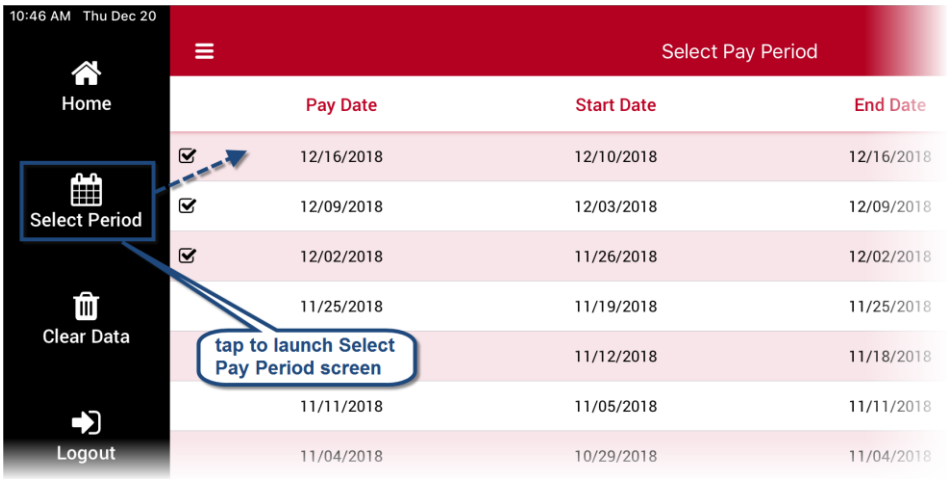
Springboard Components



Springboard components

The screenshot above details the Springboard's components.

Select Pay Period



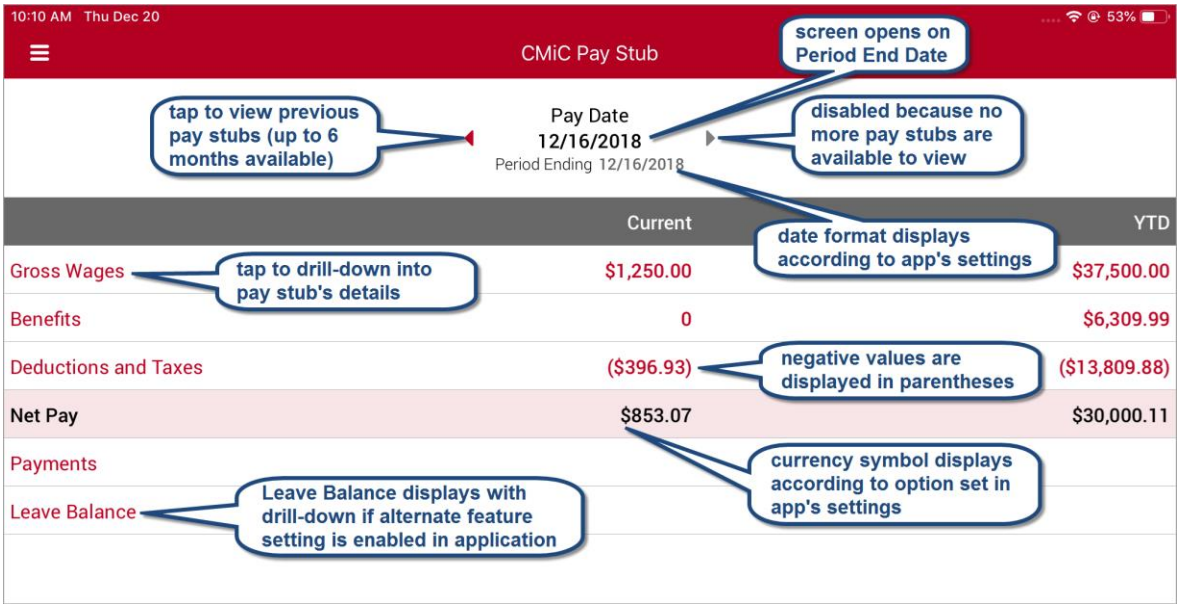
Launching the Select Pay Period screen

The Select Pay period screen is launched by tapping on the Select Period icon in the screen's Springboard.

Select Pay Period screen

The Select Pay period screen displays up to six months of available pay periods for users to tap on to view pay stub details. A refresh icon is available on this screen to download the latest pay stubs, if available. Tap on a pay period to open the Pay Stub screen and view a pay stub's details.

Pay Stub



Pay Stub screen

The Pay Stub screen displays the employee's pay stub. The arrow icons on either side of the Pay Date at the top of the screen allow the user to see previous or next pay stubs, if available. The arrow is enabled if more pay stubs are available to view; otherwise, the arrow will be disabled to indicate there are no more available pay stubs to view.

The dates and currency symbols display according to the options set in the app's Settings screen. Negative values are displayed in parentheses.

The Leave Balance field displays with a drill-down into eligible and accrued leave details for the employee if the application's alternate feature setting is enabled. For more information on this setting, refer to the Prerequisites section. If this alternate feature setting is not enabled for the application, this field will display as "Leave" and will show the leave taken by the employee for the pay stub period under the Current column, as well as the total leave taken under the YTD (Year To Date) column, but will not show any further breakdown.

Gross Wages

Gross Wages screen (launched from Gross Wages field on Pay Stub screen)

Tapping on the Gross Wages field on the Pay Stub screen opens the Gross Wages screen. This screen displays all of the employee's hour types processed and paid, as per the payroll. Leave hour types include Normal Hours, Overtime, Double time and Leave hours. The number of hours for each hour type, current earnings and YTD earnings are displayed.

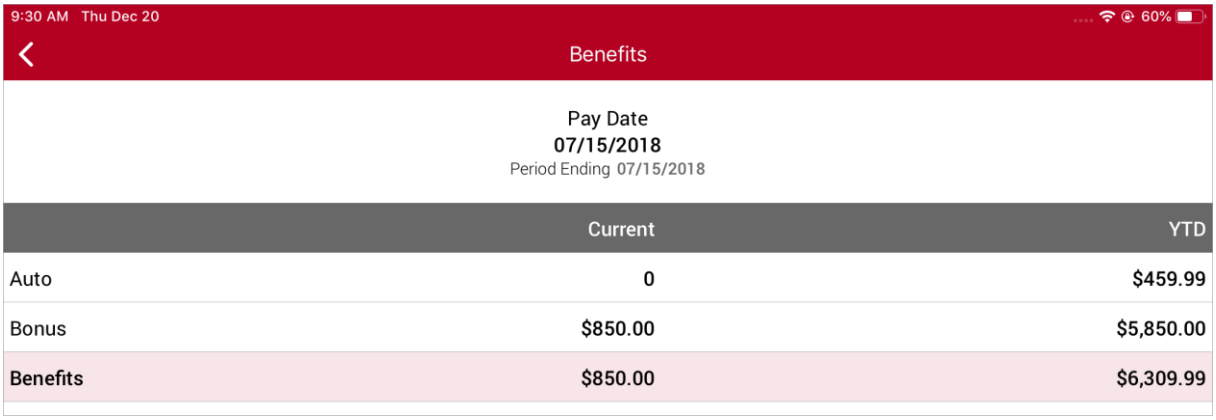
The Gross Wages screen also provides a drill-down on the Leaves field, so users can view additional details on their leaves, if any.

Leaves screen as launched from Leave field on Gross Wages screen

The Leaves screen displays the number of hours taken for the leave, as well as the leave hour code (e.g. Vacation, Personal, etc.). The current paid leave amount, as well as the YTD amount is also displayed.

Users can either tap on the Back icon in the upper left-hand corner of the screen to go back to the Gross Wages screen or tap the Home icon in the upper right-hand corner of the screen to return to the Pay Stub screen.

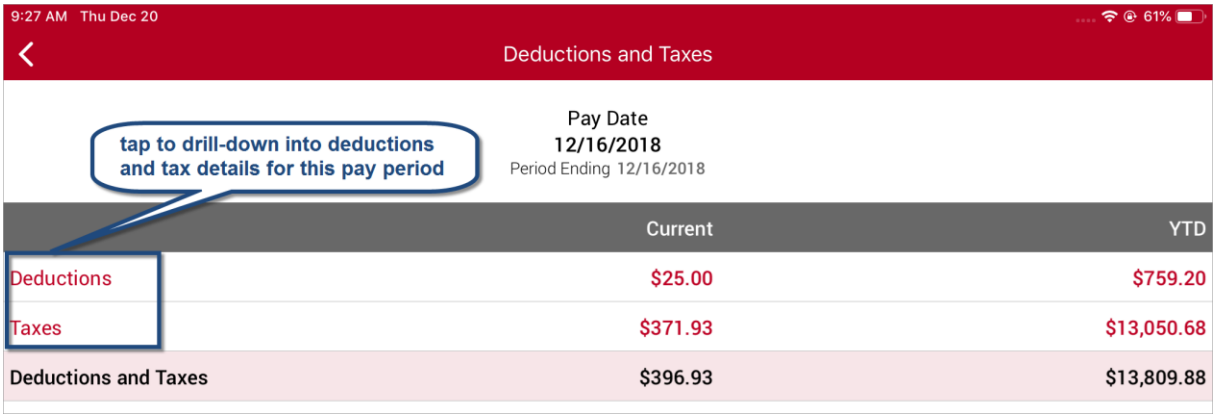
Benefits



Benefits screen (launched from Benefits field on Pay Stub screen)

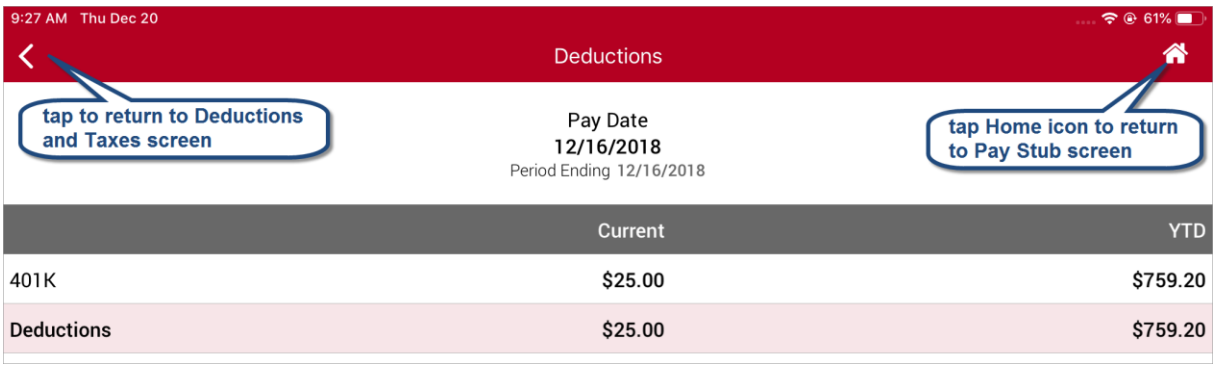
The Benefits screen displays benefits processed for the period, if any. Users can view benefits that were paid out, such as Auto or Bonus. The current benefit amount, as well as the YTD amount is displayed.

Deductions and Taxes



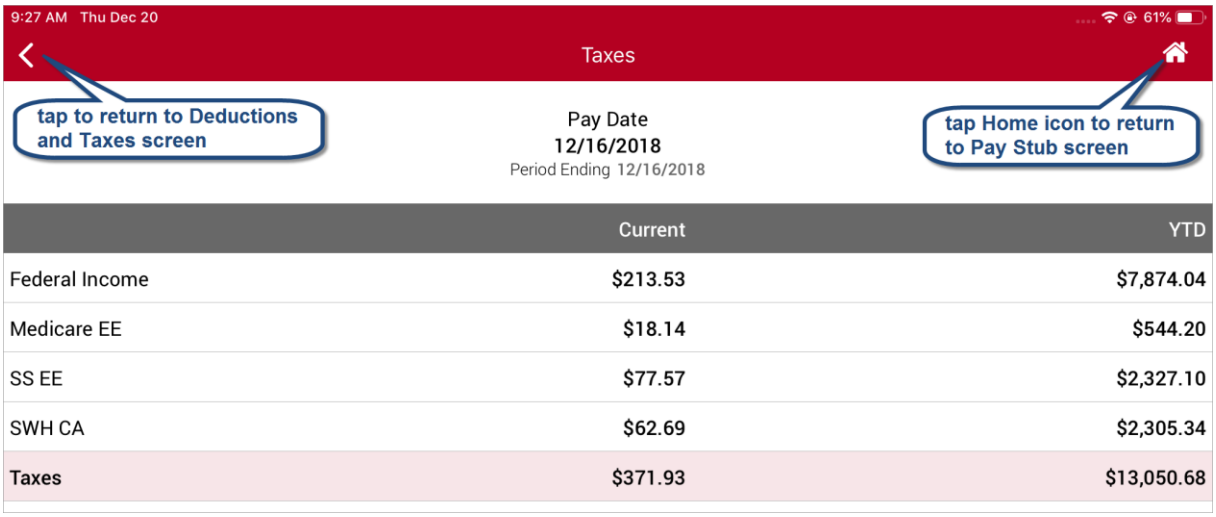
Deductions and Taxes screen (launched from the Deductions and Taxes field on the Pay Stub screen)

The Deductions and Taxes screen displays payroll deductions and taxes processed for the selected period. Current and YTD deductions are reported on this screen. This screen also provides a drill-down on the Deductions and Taxes fields, so users can view further details on these items.



Deductions screen (launched from the Deductions field on the Deductions and Taxes screen)

This screen displays the processed deductions for the pay period, and current and YTD amounts. Users can either tap on the Back icon in the upper left-hand corner of the screen to go back to the Deductions and Taxes screen or tap the Home icon in the upper right-hand corner of the screen to return to the Pay Stub screen.

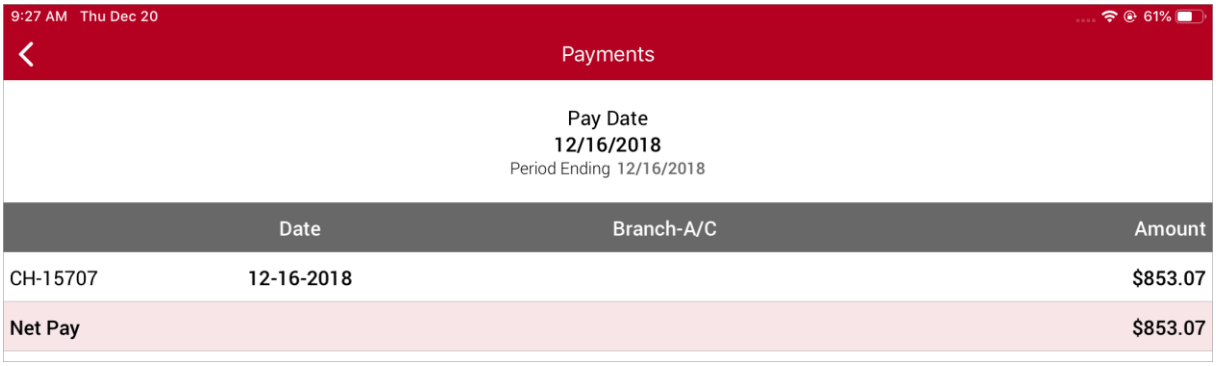


	Current	YTD
Federal Income	$213.53	$7,874.04
Medicare EE	$18.14	$544.20
SS EE	$77.57	$2,327.10
SWH CA	$62.69	$2,305.34
Taxes	$371.93	$13,050.68

Taxes screen (launched from the Taxes field on the Deductions and Taxes screen)

The Taxes screen displays the taxes processed for the specified pay period with the current and YTD amounts.

Payments



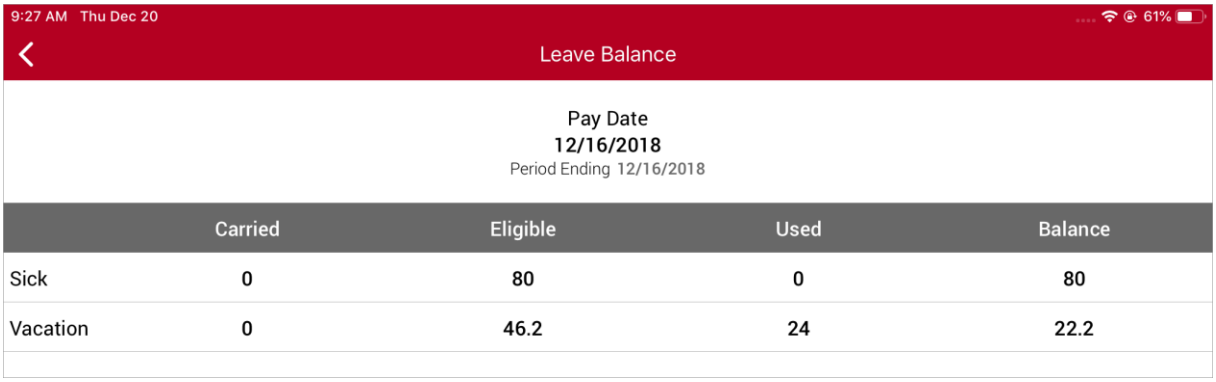
	Date	Branch-A/C	Amount
CH-15707	12-16-2018		$853.07
Net Pay			$853.07

Payments screen (launched from Payments field on Pay Stub screen)

The Payments screen displays the payment amount for the specified pay period.

If the employee was paid by check, the check number and date issued will also be displayed. If the employee was paid by direct deposit, the screen will report the DDS, Date, and employee Branch and A/C (Account) into which the pay was deposited.

Leave Balance



	Carried	Eligible	Used	Balance
Sick	0	80	0	80
Vacation	0	46.2	24	22.2

Leave Balance screen (launched from Leave Balance field on Pay Stub screen)

The Leave Balance screen is only available if the alternate feature setting is enabled on the application to display a breakdown of leave balances for eligible and accrued leaves. For more information on this setting, refer to the Prerequisites section.

This screen reports on the employee's leave time, including leave used, eligible leave time, leave balance, and any leave carried over.

NOTE: The Leave Balance screen will not be available if the alternate feature setting is not enabled for the application.

CMiC eXpense App - iPad

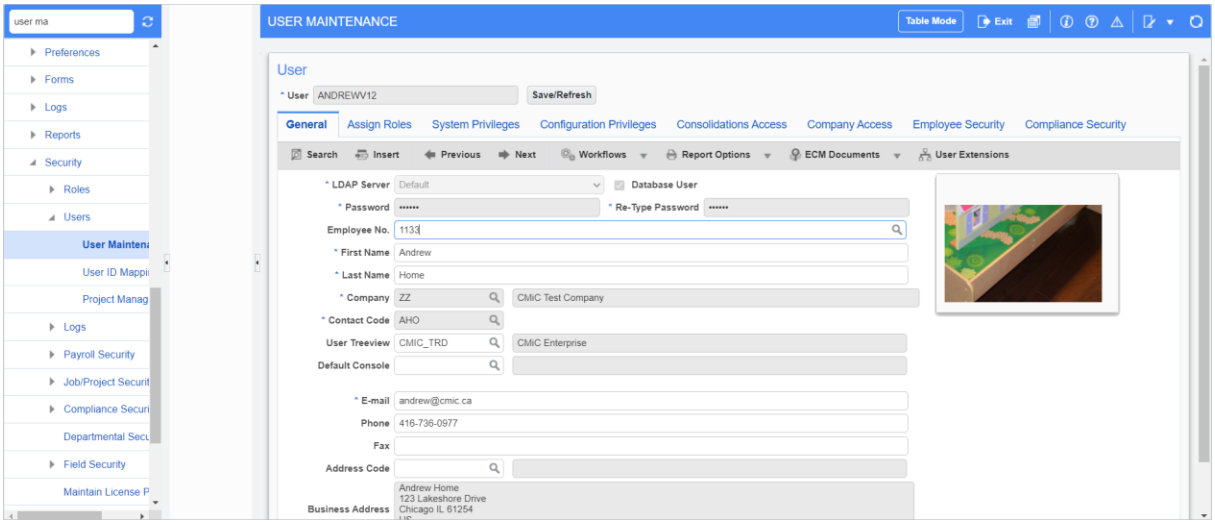
Overview

The CMiC eXpense app can be used to enter expense amounts by uploading pictures of receipts. The app allows users to take the pictures, validate the expense amounts on the receipt, and submit the expense. Once submitted, expenses are sent to be approved by the relevant administrator.

The following documentation uses screenshots from the iPad version of the eXpense app.

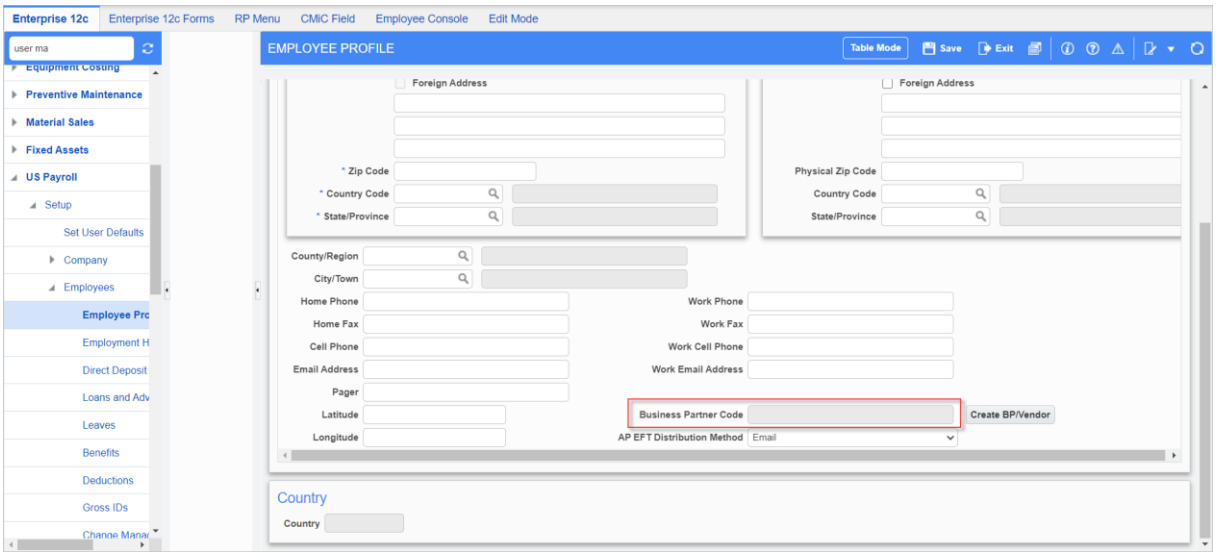
Setup

Before the eXpense app can be used the user must have their profile correctly set up in Enterprise.



User Maintenance; standard Treeview path: System > Security > Users > User Maintenance

First, users should ensure that their username has been assigned an employee number in the User Maintenance screen.



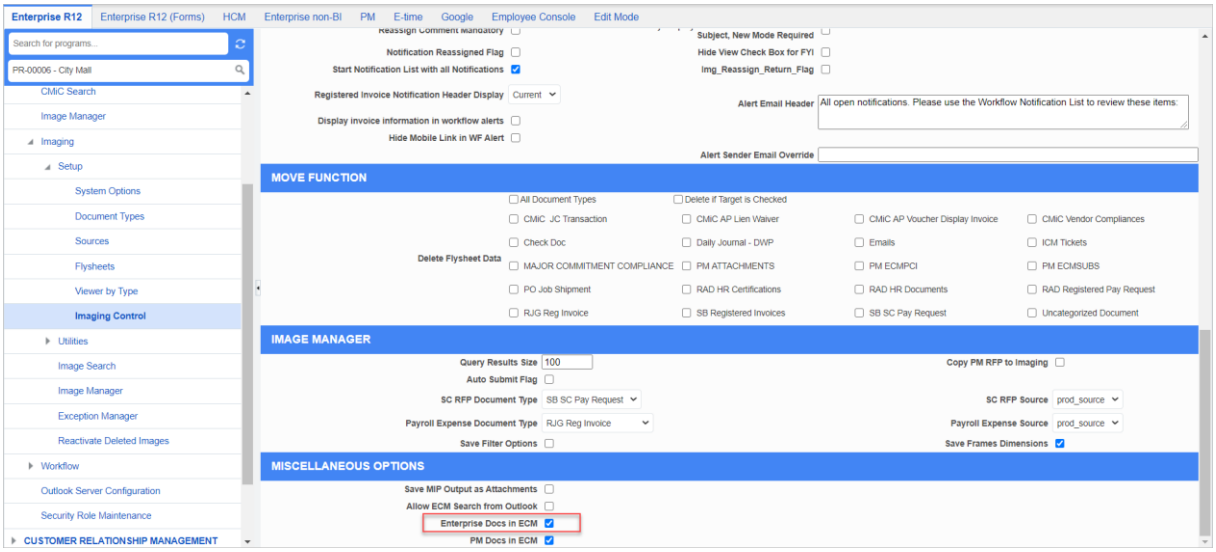
Employee Profile; standard Treeview path: US Payroll > Setup > Employees > Employee Profile – Address tab

Next, the user should be attached to a Business Partner Code. This can be done in the Address tab of the Employee Profile, as shown above.

Finally, the user should have the necessary security privileges in the Imaging module. For all sources and document types that the user wishes to see in the eXpense app, they should be assigned to those sources and document types in the Imaging module.

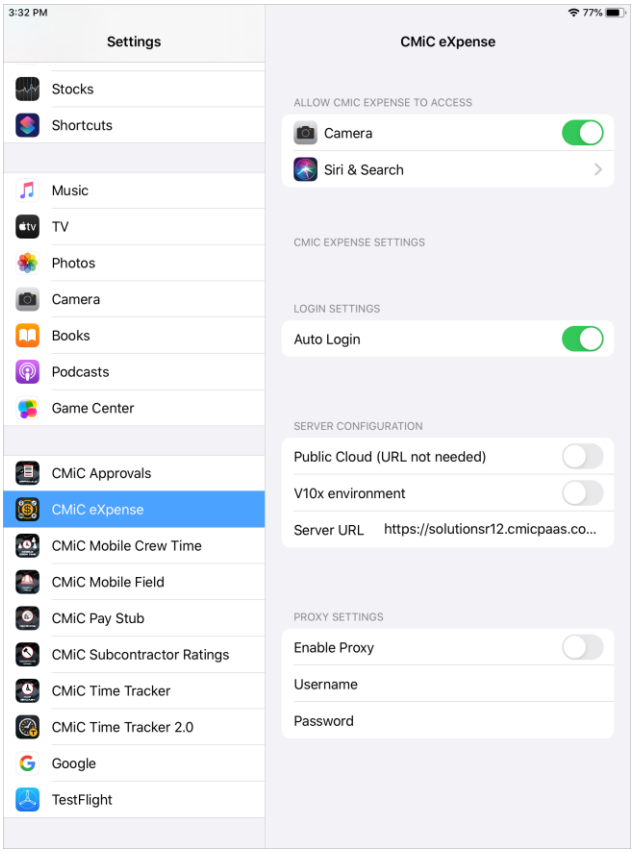
In the Imaging Control shown below, the Expense Group Code field should be set to “AP”, the Payroll Expense Document Type field should be set to “1. Ap Misc Invoice”, and the Payroll Expense Source field should be set to “Acct Source”.

The Enterprise Docs in ECM box (highlighted below) should also be checked.



Imaging Control; standard Treeview path: Imaging > Setup > Imaging Control – Miscellaneous Options tab

App Settings



Settings – CMiC eXpense screen

This screen can be used to set various options for eXpense. Please also note that the app supports Dark Mode when it is enabled from the iOS device's control centre.

This app can also be opened with Face ID. Please see the following link for more information about how to use and set-up Face ID for iPad and iPhone: https://support.apple.com/en-us/HT208109.

Allow CMiC Expense To Access

To take pictures of expense receipts, the eXpense app should have permission to access the device's camera. The app will request access after pressing the Camera icon in the app, but access can also be granted or denied here with the Camera toggle.

Auto Login

Toggle this switch to allow automatic login without having to enter login credentials every time the app is opened.

Public Cloud (URL not needed)

Toggle this switch to use the public CMiC server. If this option is selected, then a URL need not be entered in the Server URL field.

V10x environment

Toggle this switch to open and run the app in the v10x environment, as opposed to the R12 environment.

Server URL

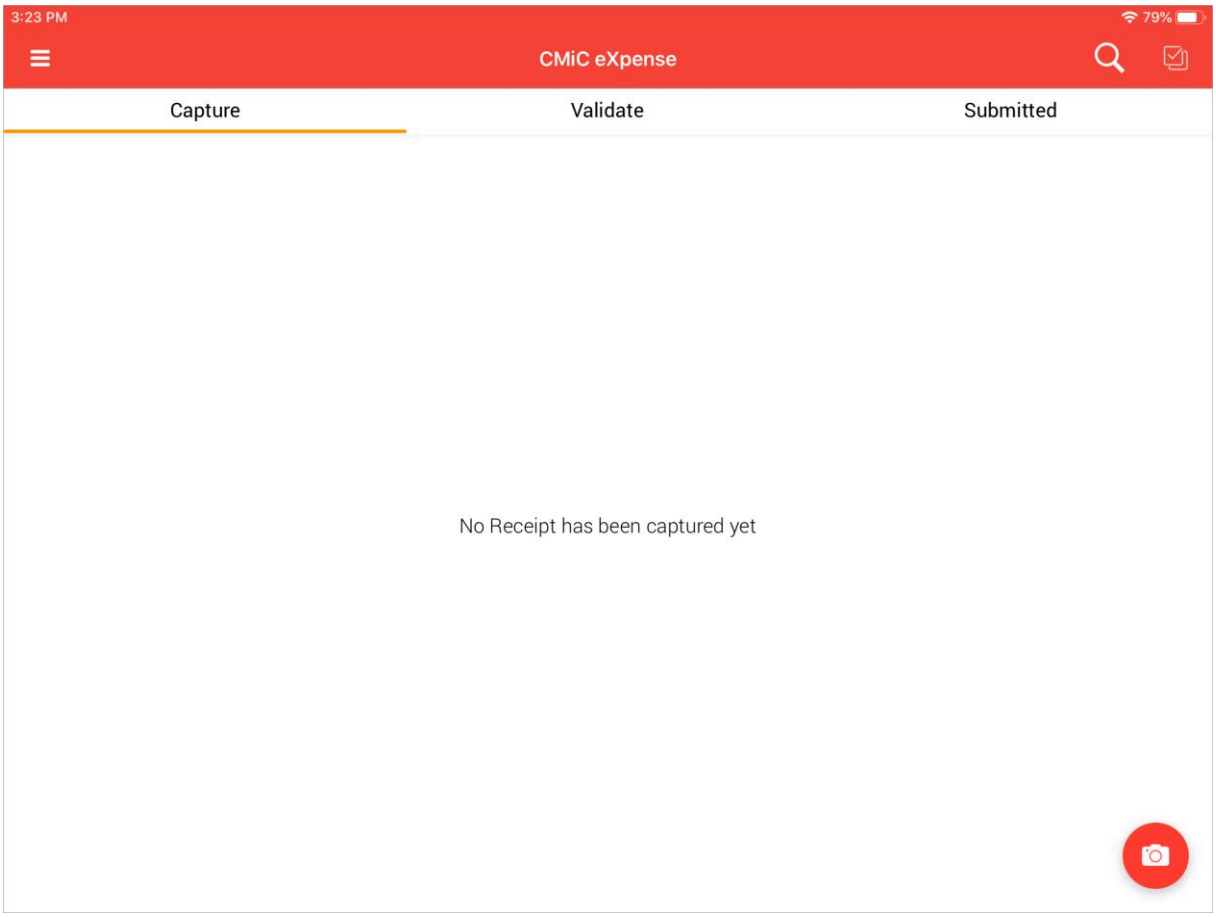
If data is to be stored on a server rather than on the public cloud, enter the server URL here.

NOTE: As with the Approvals app, this URL should point to an application server. Server URLs for all other apps should point to a BI or Mobile sever. See the *Approval app* section of this guide for further details.

Proxy Setting

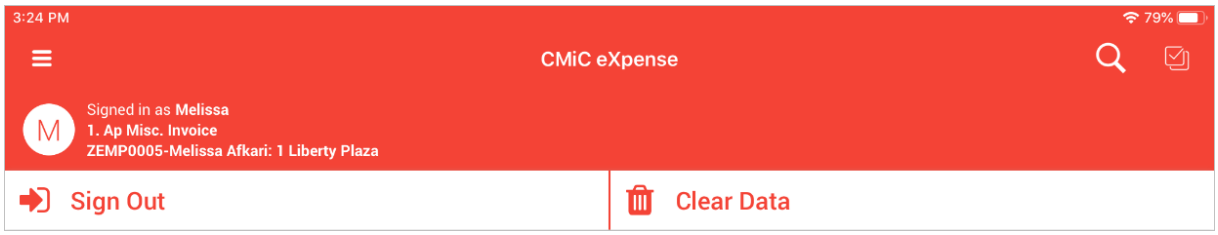
To use a proxy server for the eXpense app, toggle the Enable Proxy switch and enter a username and password for the server.

Main Screen



CMiC Expense Main Screen – Capture tab

Main Menu Icon ( )



Press this icon to show the Sign Out and Clear Data icons, shown above. Press the former to sign out and return to the log-in screen and the latter to clear the local cache of all app data. Information regarding the logged-in user is also displayed.

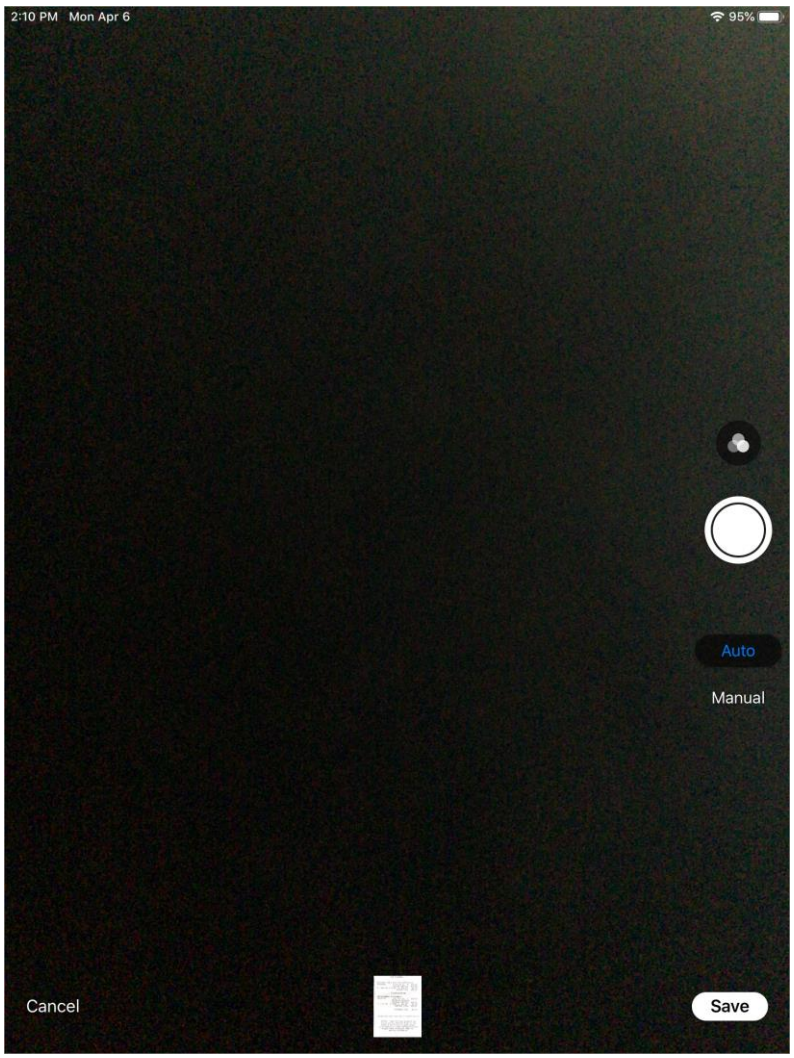
Search Icon ( )

Press this to bring up the search bar at the top of the main screen. Enter search term in the search bar to limit the receipts shown in for the selected tab.

Multi-select Icon ( )

Press this icon to select multiple receipts from any of the three tabs in the eXpense app. This can also be used to upload the receipt records to the cloud by selecting the relevant images and pressing the Cloud icon ( ).

Camera Icon ( )



Press the Camera icon to take a picture of a receipt using the device's Camera app as shown above. If access to the device's camera has not yet been granted in the Settings app, a pop-up will appear requesting permission.

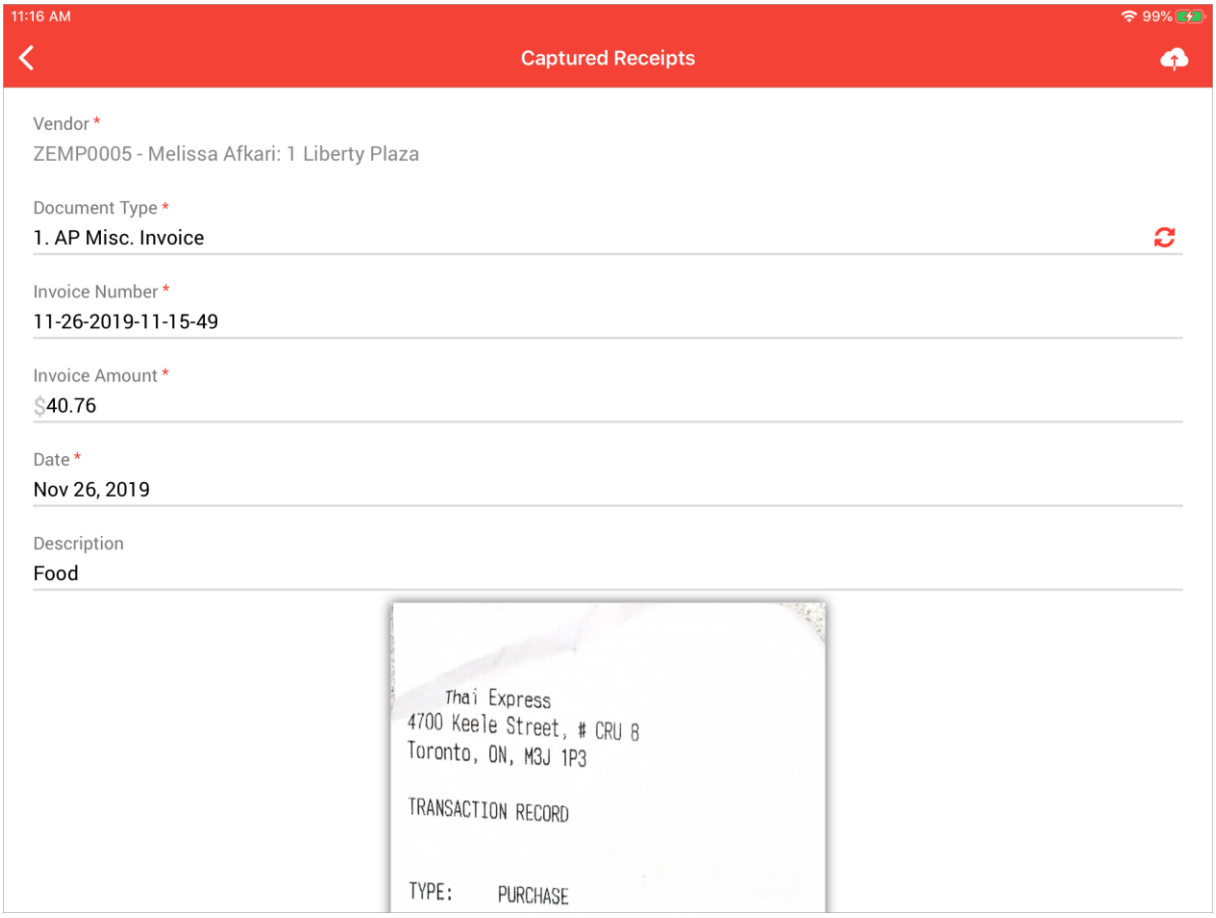
When in app, as shown below, the eXpense app allows for two modes, Auto and Manual. Press the [**Cancel**] button to return to the tab from which the Camera icon was pressed.

- **Auto**: The app will automatically detect the outline of the receipt, as shown by the blue area in the screenshot below and capture the image. After a receipt has been scanned a message will display saying "Ready for next scan." Press the [**Save**] button to save the image or press the [**Cancel**] button to return to the Capture tab.
- **Manual**: The app will still detect the outline of the receipt, but the capture button must be pressed to take the picture. After the picture has been taken, the image may be resized by moving any of its corners.

Capture – Tab

After receipt pictures have been taken and the [**Save**] button has been pressed in the Camera app, the screen shown above appears. Press the [**Edit**] button to take a new picture or to edit the one just taken, press the Trash icon ( ) to delete the selected image, or press the [**Cancel**] button to return to the Capture tab without saving the receipt images taken.

Press the [**Done**] button after all receipts have been added to an invoice to run OCR (optimal character recognition) on the receipt, as shown above by the screen on the right. This will convert the invoice amount, date, and description into text which can then be validated in the screen shown below.

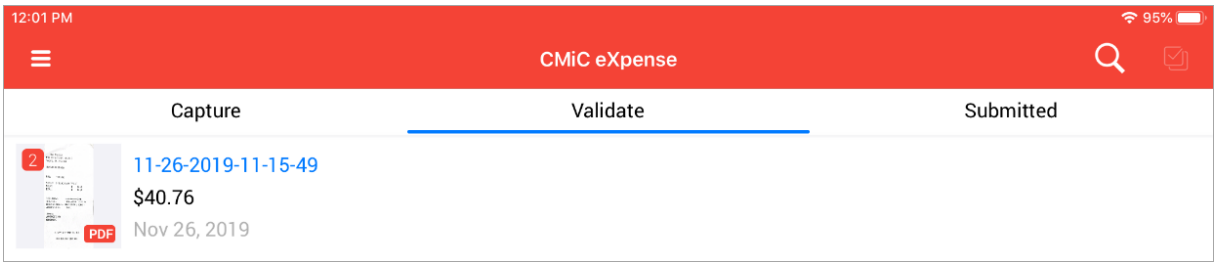


CMiC eXpense – Captured Receipts screen

Here, all data regarding the invoice can be entered. The Invoice Amount, Date, and Description fields are entered automatically with OCR. All fields on this screen may be edited except for the Vendor field.

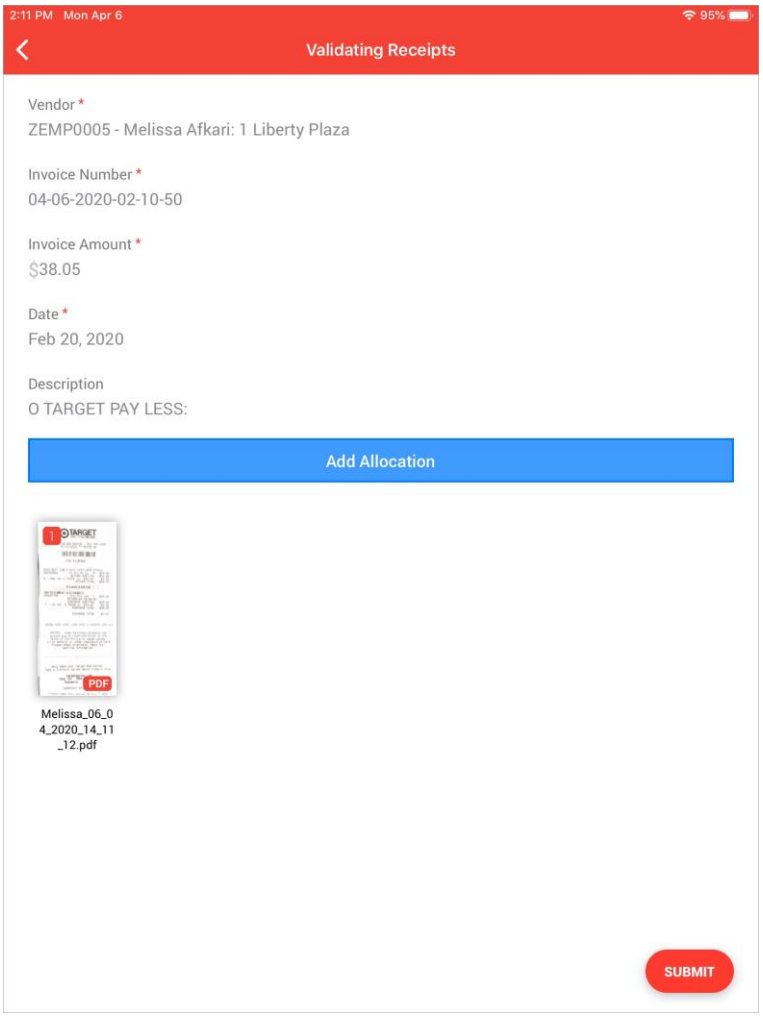
This invoice now appears in the Capture tab. Press the Cloud icon ( ) to upload the invoice and its data to either the public cloud or the URL entered in the Server URL field, and move it to the Validate tab.

Validate – Tab



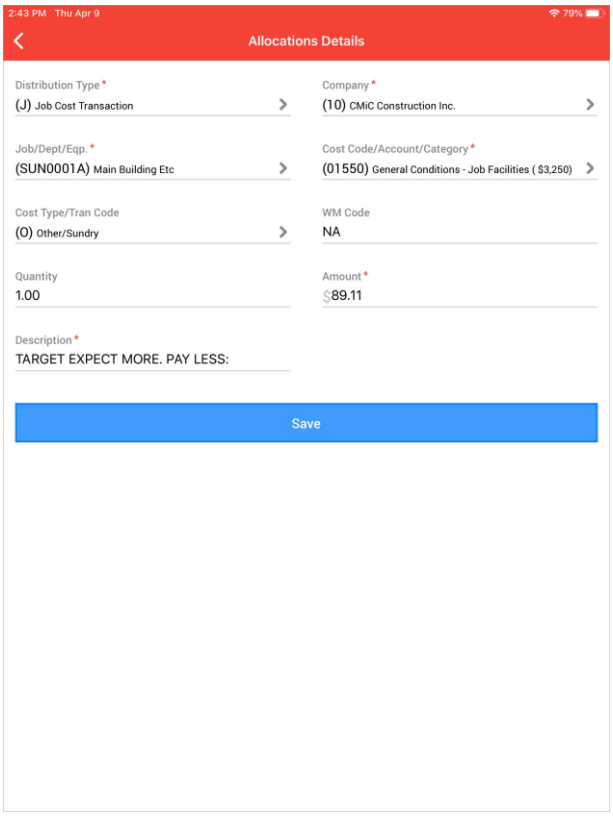
CMiC eXpense Main Screen – Validate tab

Once a receipt image has been captured, saved, and its details confirmed, it appears in this tab. Press on an invoice line to bring up the Validating Receipts screen, shown below.



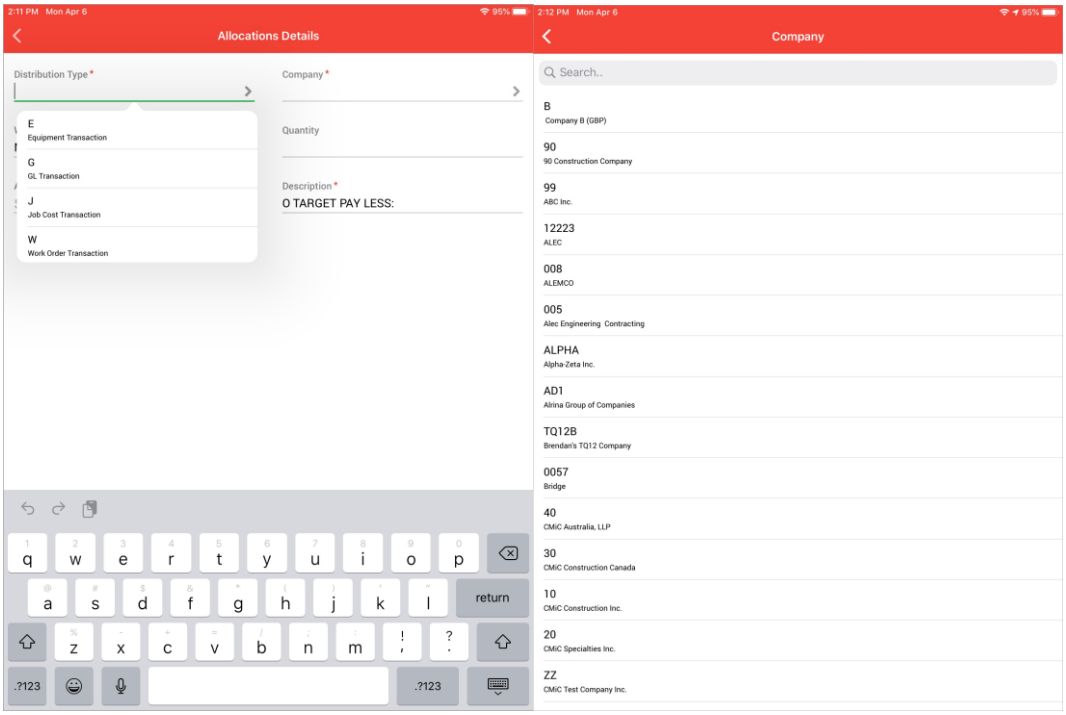
CMiC eXpense – Validating Receipts screen

This screen gives the user the ability to check the information and add any allocations. Press the [**Submit**] button to create the invoice and move it to the Submitted tab. Press the [**Add Allocation**] button to create the invoice and open the Allocation Details screen, shown below.

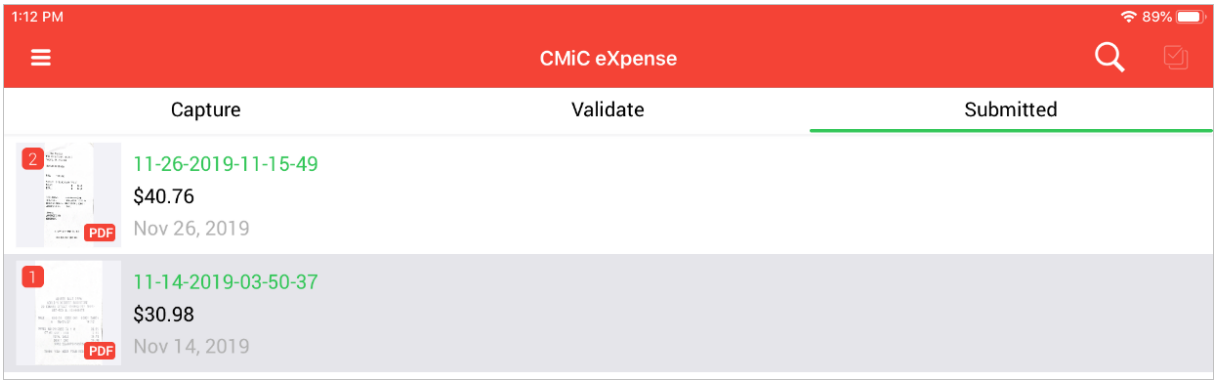


CMiC eXpense – Allocations Details screen

Enter the details of the invoice allocation here and press the [**Save**] button when done. Tap a field to display entry options, as shown below on the left. Press the Expand icon ( ) show all the options for a given field, as shown below on the right.



Submitted – Tab



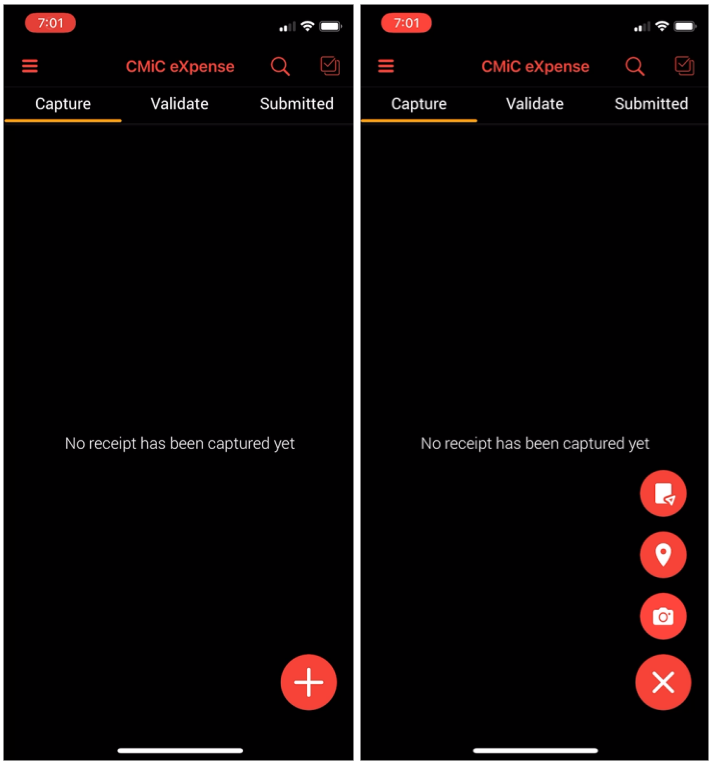
CMiC eXpense Main Screen – Submitted tab

After a receipt has been captured and validated, it appears in this tab. Allocations can be added to any submitted invoice by pressing the invoice row and pressing the [**Add Allocation**] button.

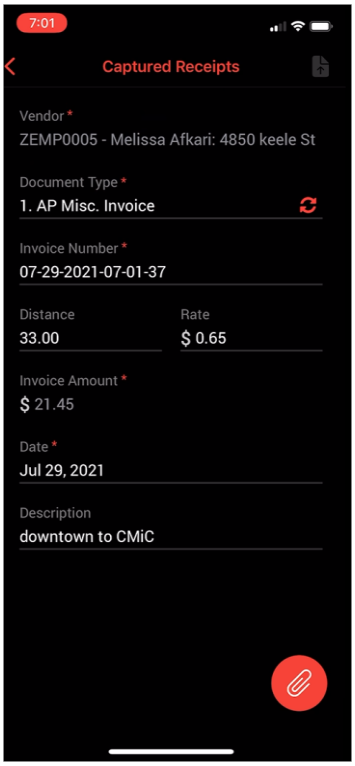
CMiC eXpense App – iPhone

The CMiC eXpense app can be used to enter expense amounts by uploading pictures of receipts. The app allows users to take the pictures, validate the expense amounts on the receipt, and submit the expense.

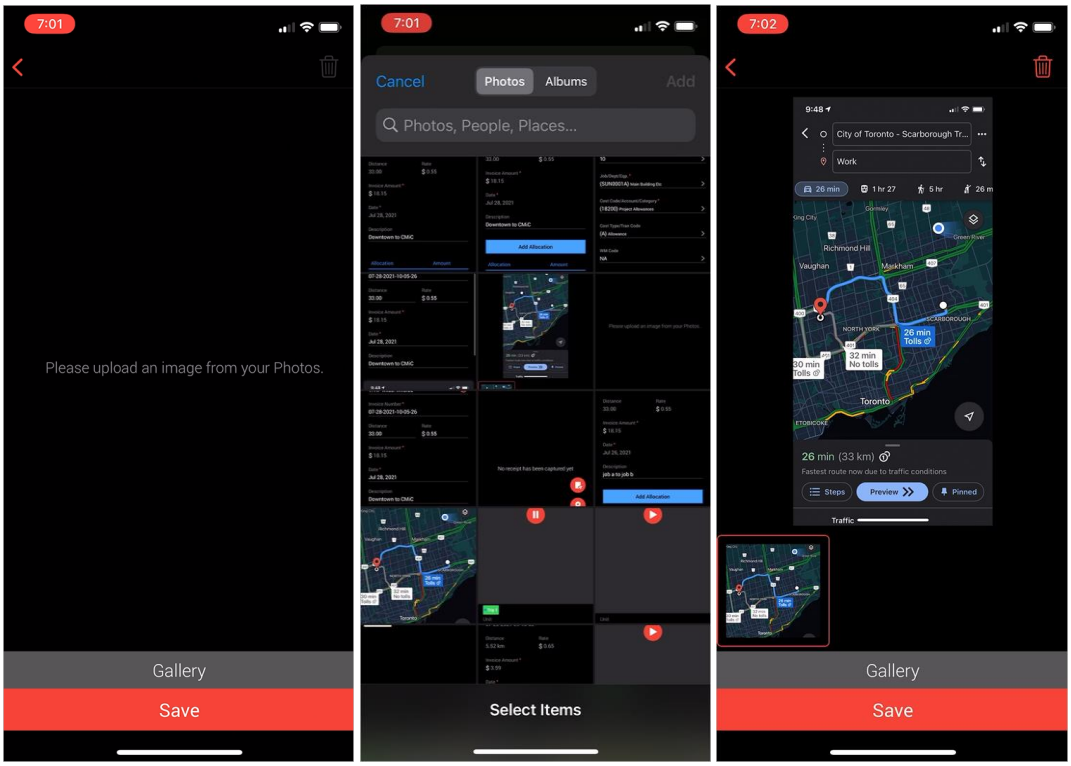
As an example, this article documents how to upload an expense for a taxi ride.



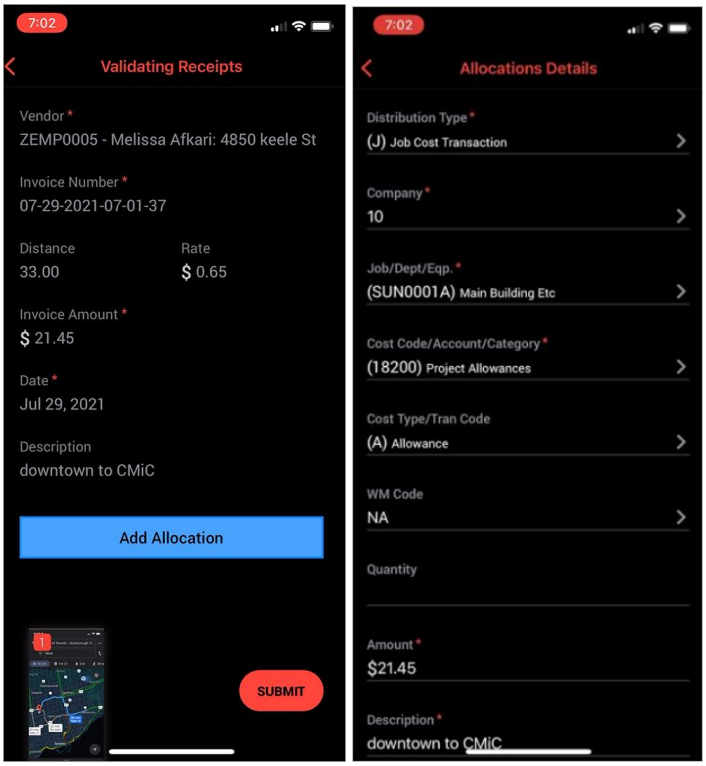
Above is the main screen of the eXpense app. Press the Plus icon ( ) to reveal the options in the right-hand picture. Users can either take a photo of their receipt with their phone camera ( ), add their location ( ), or upload a photo from their library ( ). In this example, the third option will be used to upload a photo of the taxi route.



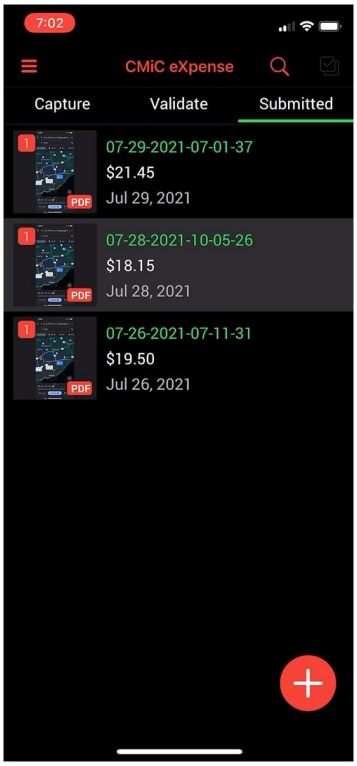
Here, users can enter the details of the expense. The invoice amount can either be entered manually, or it can be calculated by multiplying the distance and rate amounts. The Upload Expense icon ( ) in the top-right of the screen is not available until a picture has been added by pressing the Attachment icon ( ).



Press the [**Gallery**] button to choose a picture from your device's camera roll. Then, select the items to upload and press the [**Add**] button. Finally, press the [**Save**] button to attach the pictures to the expense record.



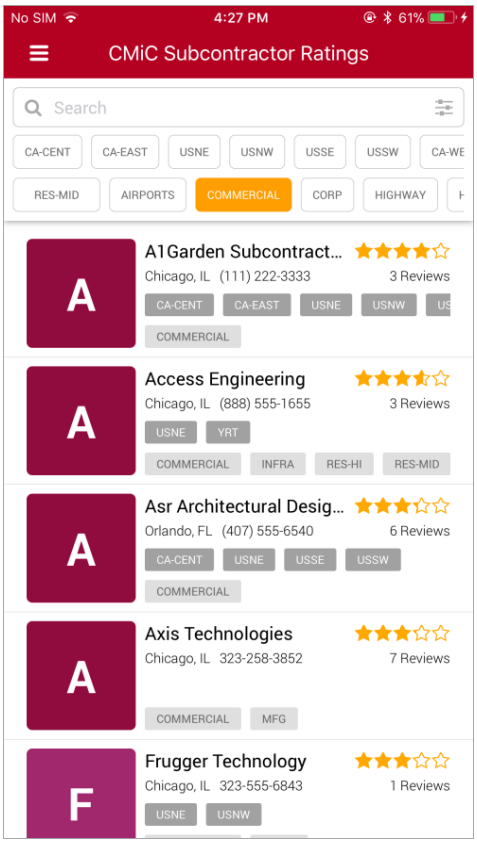
Users can also add any allocations to their expense by pressing the [**Add Allocation**] button. This opens the Allocations Detail screen. After entering the necessary information, scroll to the bottom of this screen and press [**Save**]. Once all allocations have been added, press the [**Submit**] button to upload the expense. Please note that allocation can no longer be added after the record has been submitted.



Finally, the expense record will appear in the Submitted tab of the main screen.

Subcontractor Ratings Mobile

Overview – Subcontractor Ratings



As we all know, subcontractors and vendors can have a major impact on the success of a project. And finding reliable, competent subcontractors and vendors can be quite difficult, especially since they are usually quite busy. Hence, when choosing subcontractors and vendors for success, it is vital to have a comprehensive and reliable repository of ratings for them.

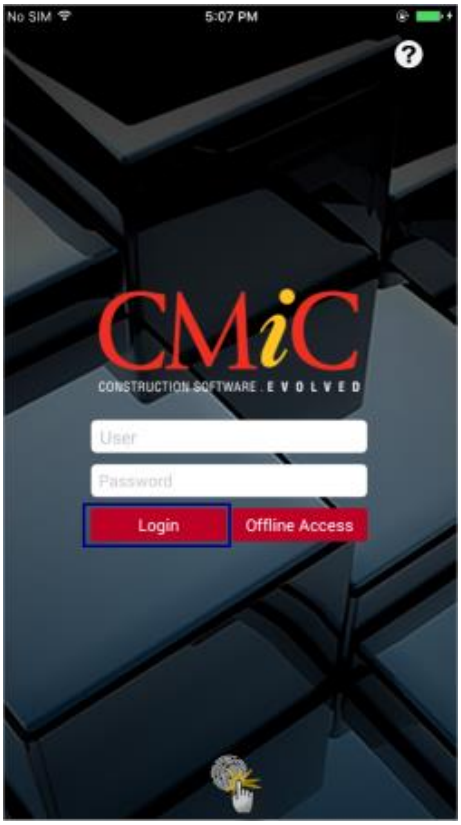
To greatly facilitate the creation of such a vital repository, Subcontractor Ratings Mobile provides all project stakeholders a convenient (i.e., mobile) and quick way to rate and comment on subcontractors and vendors.

To maximize the meaningfulness and reliability of the repository's reviews, rating categories and category questions can be customized to have different weights, and to score against user-defined areas, such as quality of workmanship, scheduling, working relationship, and pricing. Additionally, reviews may be weighted according to the reviewer's level of involvement in the project.

The key features of Subcontractor Ratings Mobile are:

- Customizable categories and questionnaires for reviews
- Weighted ratings based on Project Roles and categories
- Full moderation controls to eliminate disgruntled or inappropriate reviews
- Reviews for subcontractors and vendors are against the projects & subcontracts they worked
- Printing capabilities for Evaluation Scorecards

Login Screen



Users have two modes for logging into Subcontractor Ratings: **Touch ID** and **User Name & Password** (and **Tenant ID** for Cloud users). On the login screen, as shown above, users can tap on the **Keyboard** icon to log in by entering their CMiC Single Sign-On credentials (User ID and password, and for Cloud users, Tenant ID also), or they can tap the Fingerprint icon at the bottom of the login screen to log in using the Touch ID mode and the iPhone's Home button (fingerprint is scanned by Home button).

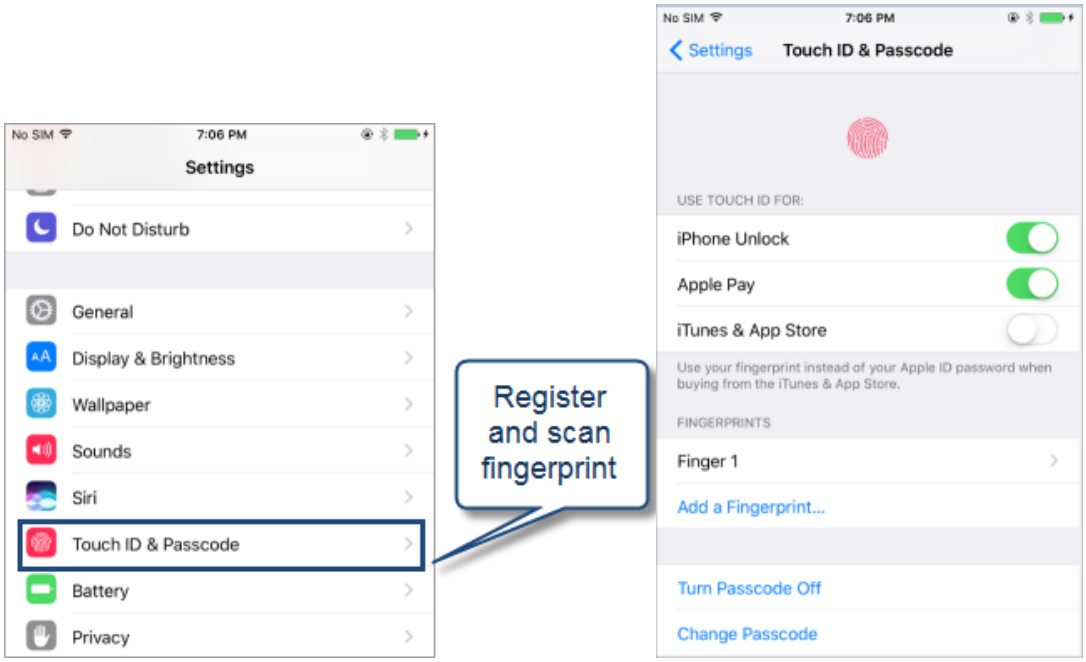
[**Offline Access**] – Button

This button is used to start the application when there is no internet connection.

In Offline mode, ratings are entered as usual, but instead of uploading them to the system, they are saved on the device. When the app detects an internet connection, it will automatically upload the ratings.

Touch ID Login Setup – Register Fingerprint

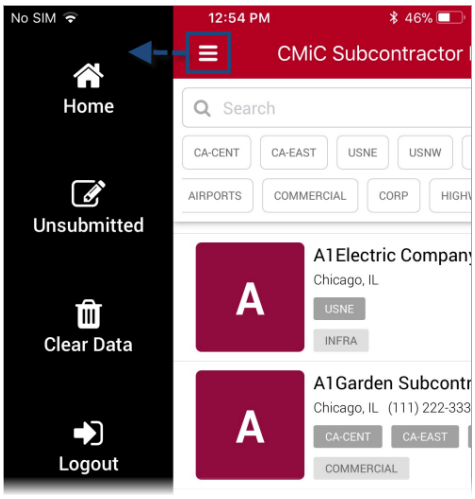
To log in to CMiC Subcontractor Ratings using the Touch ID mode, users must scan and register their fingerprint on their device. Please note that any finger prints registered on the device will have access to CMiC Subcontractor Ratings through the Touch ID login functionality.



Menu

The following provides details about the app's menu.

Menu Toggle



Tap the Menu toggle to hide/reveal the menu along the left side of the screen.

Home

Tap the **Home** menu option for the Home screen.

Unsubmitted

Tap the **Unsubmitted** menu option for the Unsubmitted Reviews screen.

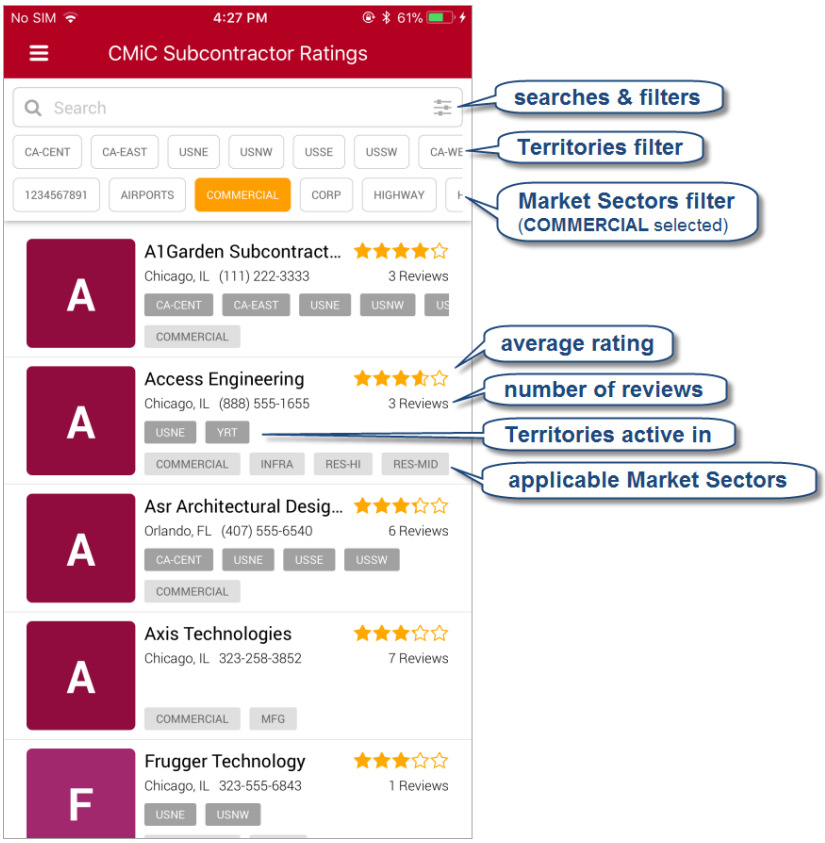
Clear Data

Tap **Clear Data** to delete all of the saved data in the device (i.e., saved offline data, unsubmitted reviews). This does not affect any data submitted into the Enterprise system.

Logout

Tap **Logout** to disconnect the app from the CMiC Enterprise system and to exit the app.

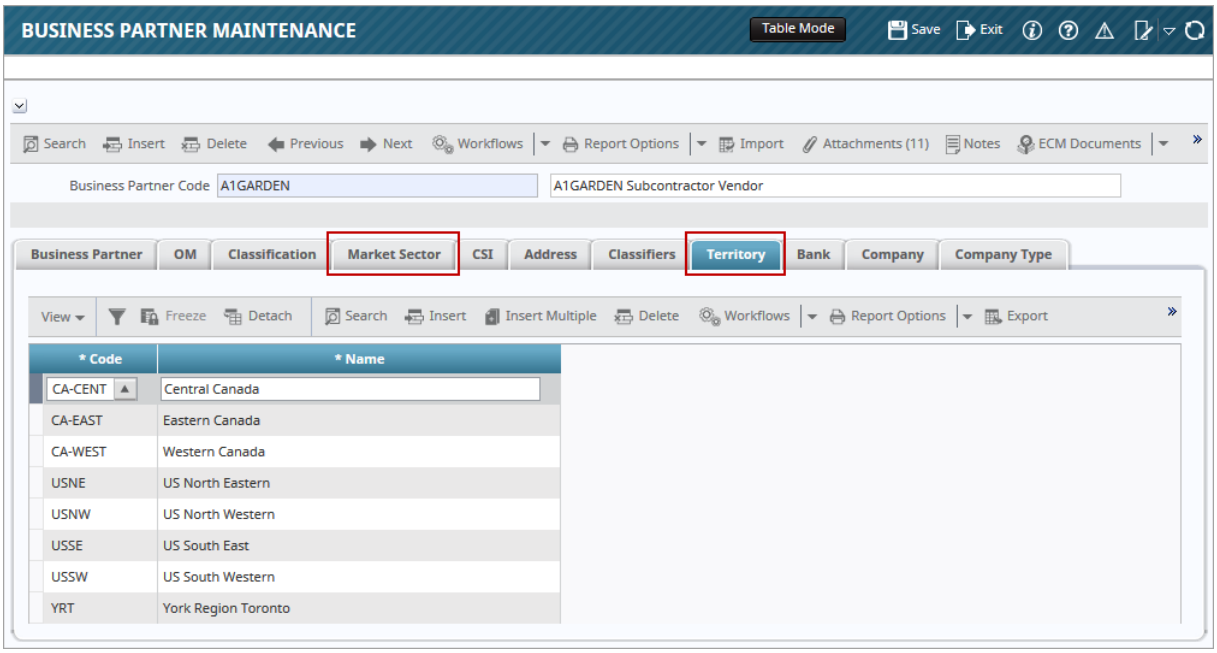
Home – Screen



Shown above is the Home screen, which provides searching, filtering and sorting options along the top, and lists subcontractors and vendors (i.e., Business Partners) underneath. Note, the Territories and Market Sectors filters can be scrolled horizontally.

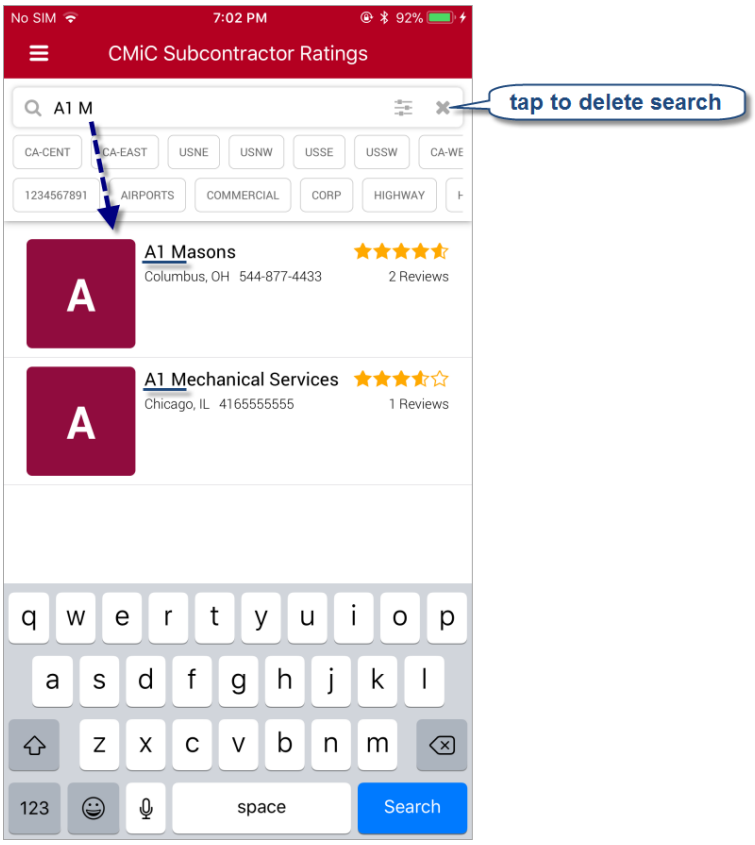
As shown above, for each subcontractor or vendor, their average star rating is shown, based on the shown number of reviews. Also shown is the Territories they operate in and their applicable Market Sectors.

The displayed Market Sectors and Territories come from the **Market Sector** and **Territory** tabs of the Business Partner Maintenance screen, as shown below:



Searches, Sorts & Filters

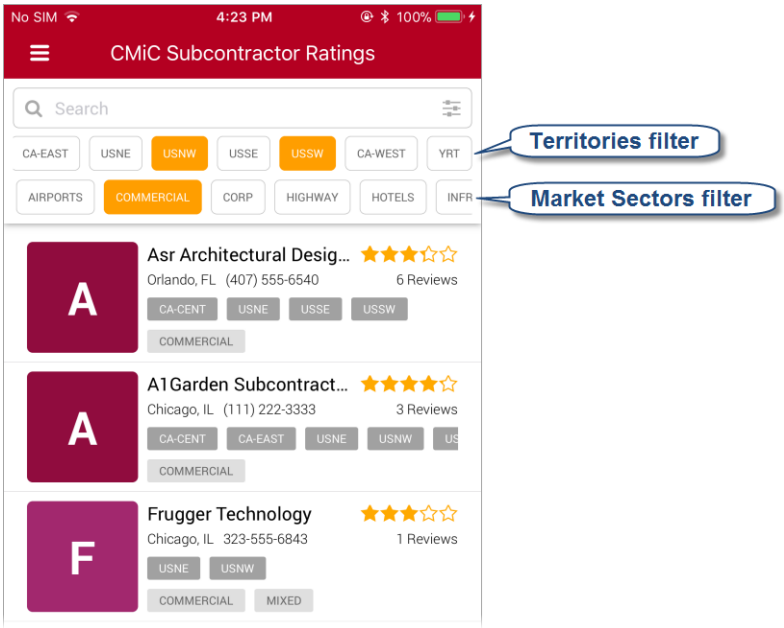
Searches



Use the Search box to search for a subcontractor or vendor by name, address or territory. As you type, all partial matches against names, addresses and territories are listed. Tap the **Search** on-screen keyboard key to make the keyboard disappear.

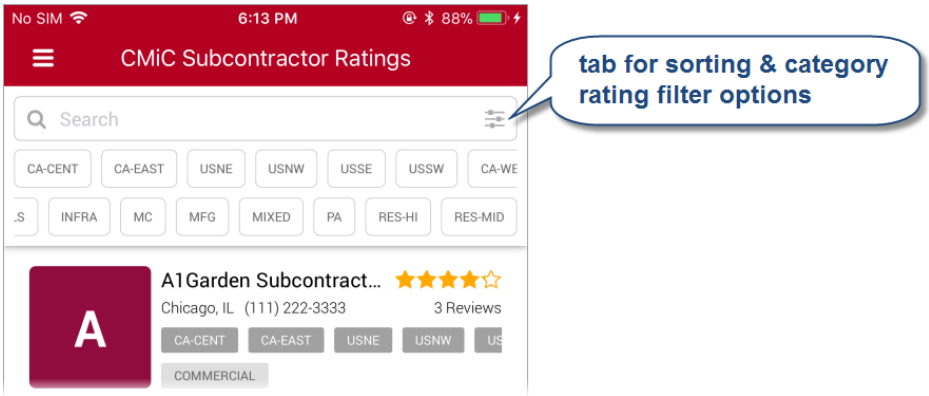
Wild card characters are not required, as the character sequence entered in the Search box is searched against all characters in names, address and territories. If the entered character sequence is matched anywhere in a name, address or territory, a partial match is found.

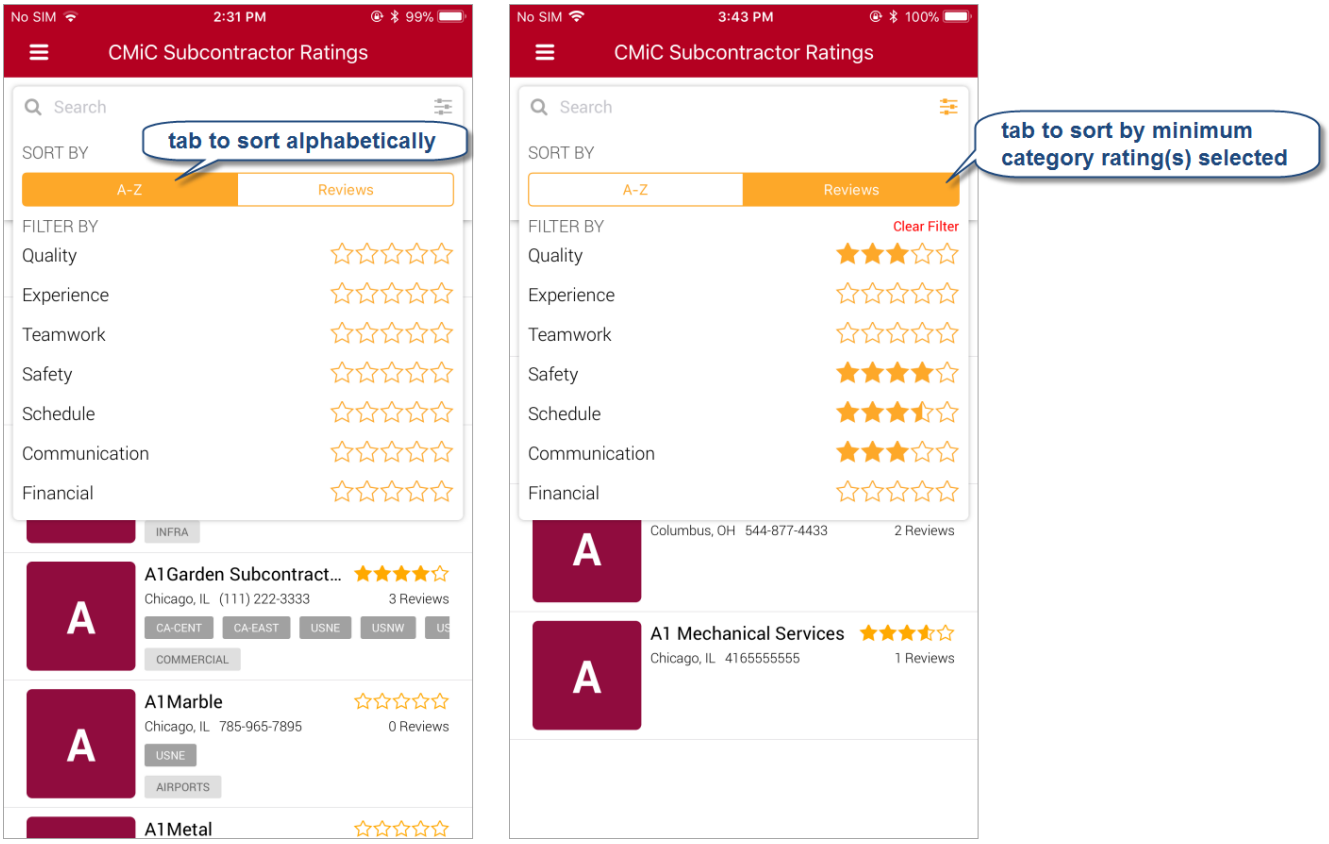
Market Sector & Territory Filters



Use the Territories and Market Sectors filters, which can be scrolled horizontally, to filter subcontractors/vendors by what Territories they operate in and by what Market Filters are applicable to them. Only subcontractors/vendors that operate in at least one of the selected Territories and that belong to at least one of the selected Market Sectors will be listed.

Alphabetic Sort & Category Rating Filters

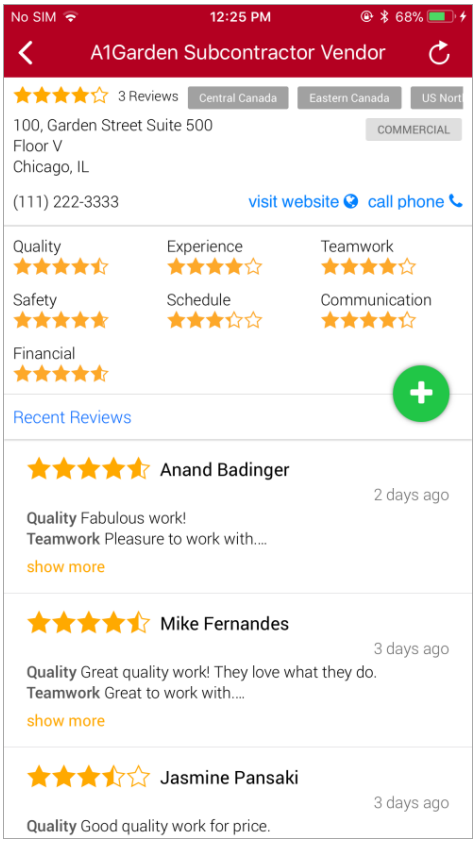




Tap [**A-Z**] to sort alphabetically, or tap [**Reviews**] to sort by category ratings, based on the minimum category rating(s) selected. For instance, if you select 3 stars for the **Quality** category, only subcontractors or vendors with a minimum 3 star rating for the **Quality** category will be shown.

Tap to close the Sort/Filter dropdown.

View & Enter Reviews

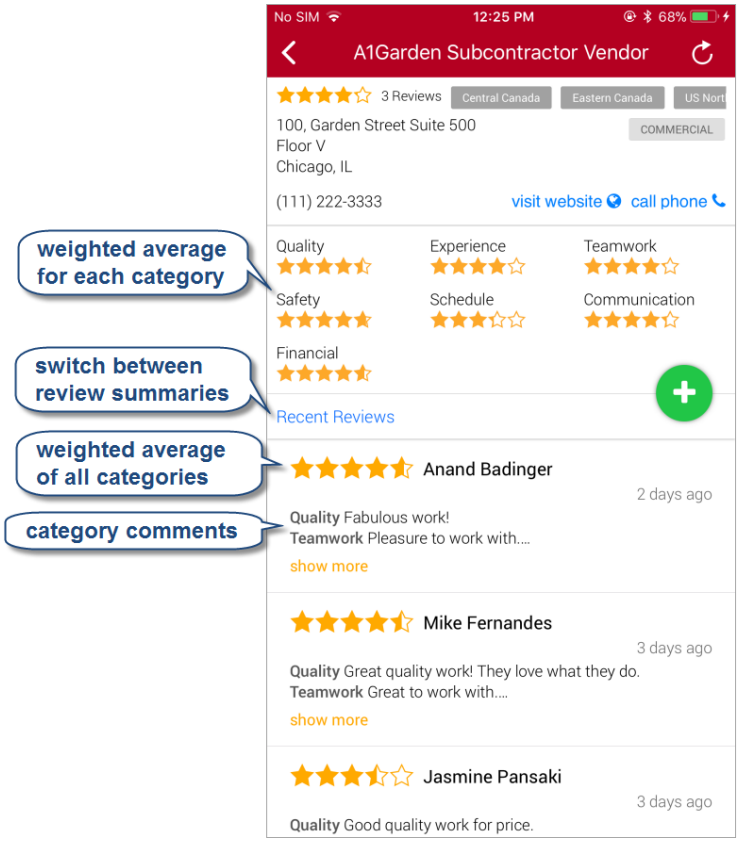


On the Home screen, tap a subcontractor/vendor to display the above screen for viewing and entering reviews.

The reviews under the Recent Review section are ordered from the most to least recent.

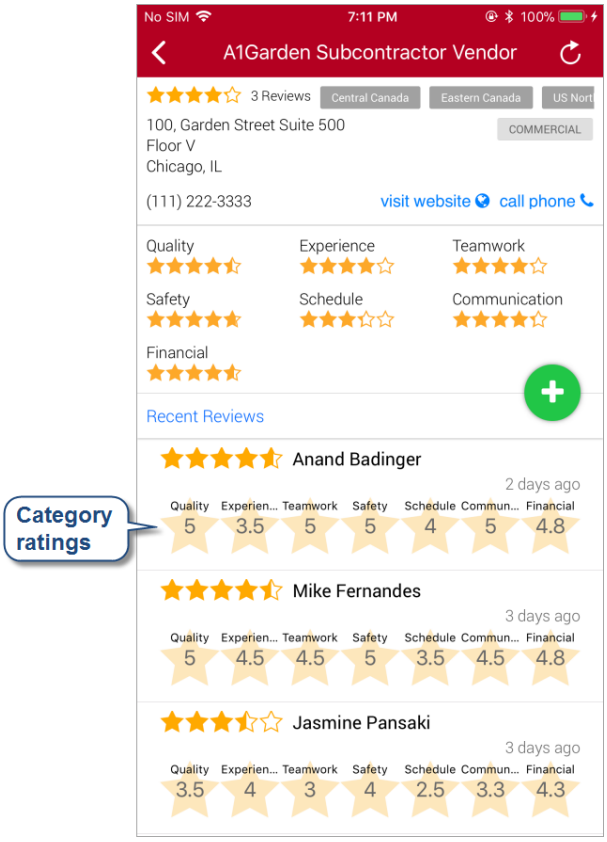
NOTE: The reviewers' names may be hidden or displayed depending on the setting of the Show User toggle in the Settings screen. Please see the *Mobile Settings – iOS* section for details.

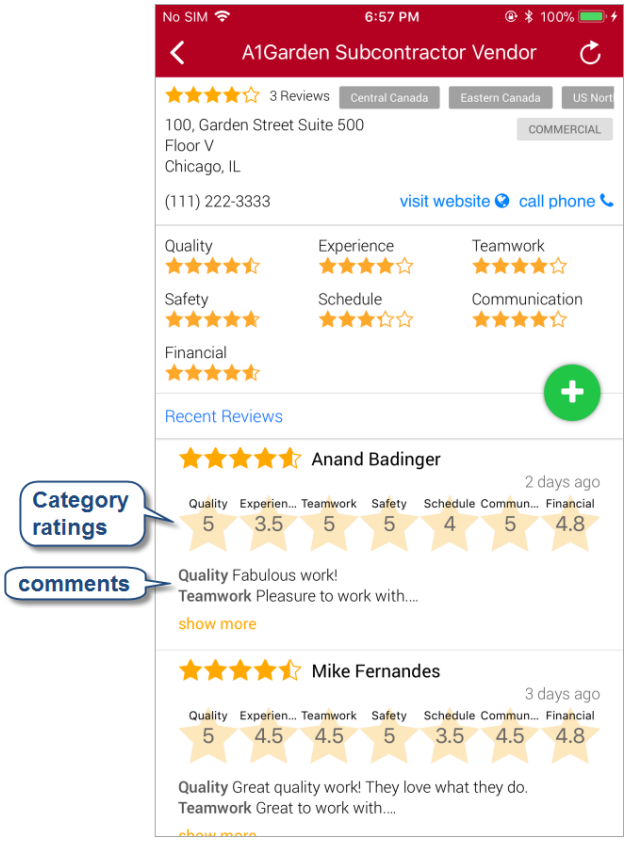
Viewing Reviews



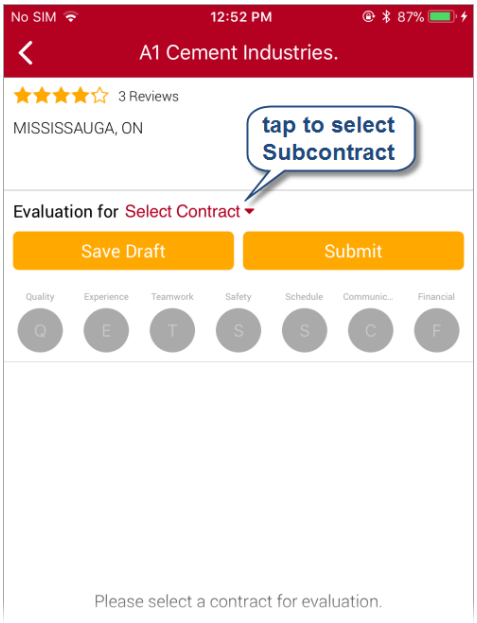
The average rating for each category, based on the reviews from the listed reviewers, is shown under the subcontractor's/vendor's info.

Tap Recent Reviews to switch between review summaries for each reviewer. Below are the other two summary displays:

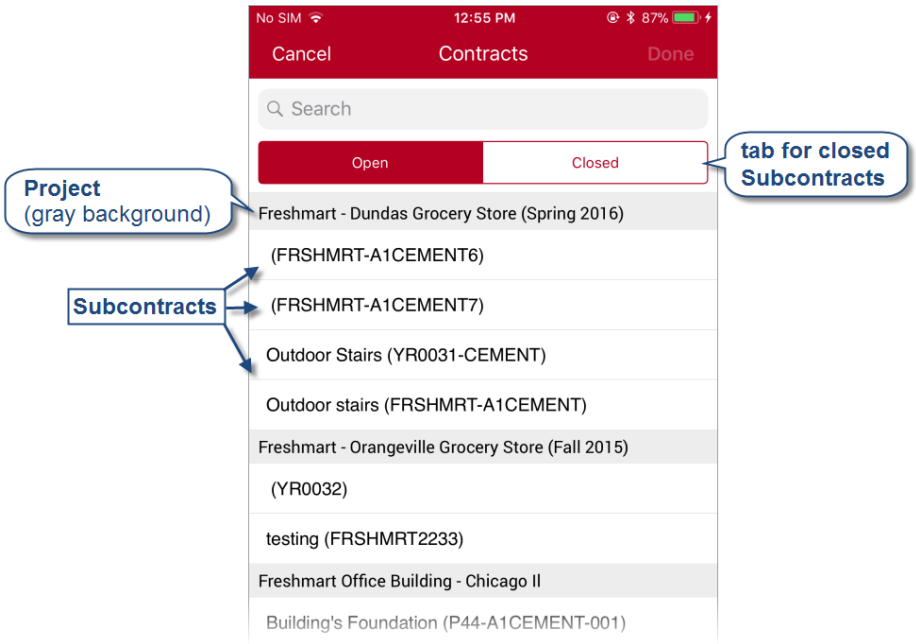




Entering Reviews



To enter a review, tap the Add icon to display the above screen. Then tap Select Contract to display the following screen to select the Subcontract to be reviewed.

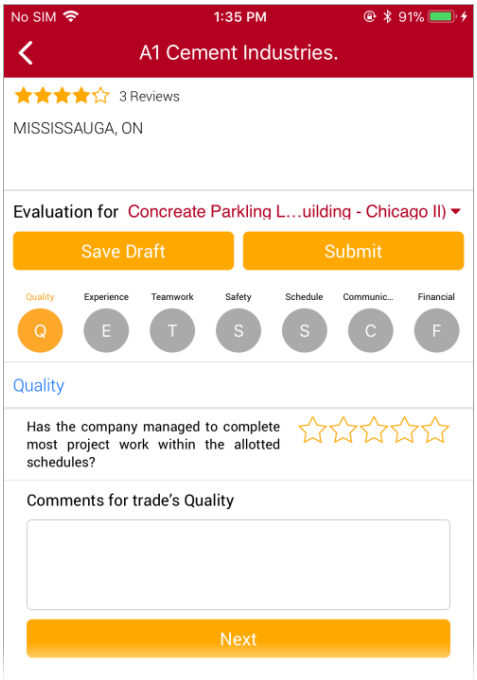


The list shows Subcontracts worked by the subcontractor being evaluated, grouped by Projects. The **Open** tab lists Subcontracts for open Projects, and the **Closed** tab lists Subcontracts for closed Projects. Only Projects made available to the user through Project Security are listed.

The Project lines are distinguished by gray backgrounds, and the Subcontracts under each Project are on slightly indented lines.

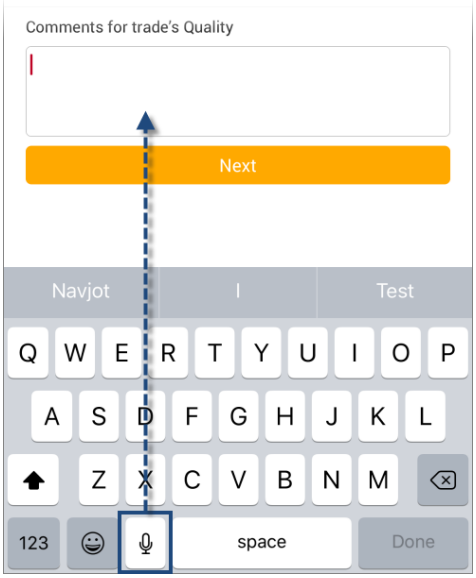
Use the Search box along the top to search for a Project or a Subcontract.

To select a Subcontract, tap it and tap [**Done**] at the top-right of the screen. After selecting the Subcontract for which the subcontractor will be reviewed, the following screen to enter the review is shown:



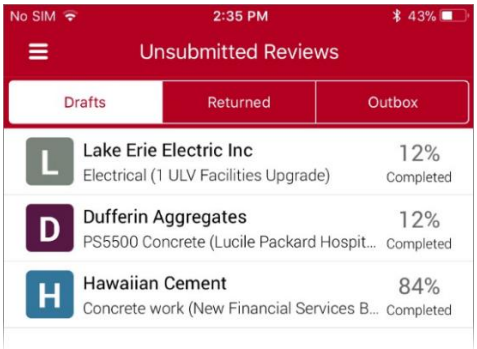
Tap a Review Category bubble to enter a review for it, or use the [**Next**] button to move to the next category.

For the selected Review Category, use the stars to provide a rating for it, and the Comments box to enter comments, if appropriate. Note, the device's microphone can be used to enter text in the Comment field by tapping the microphone key on the popup keyboard, shown below.

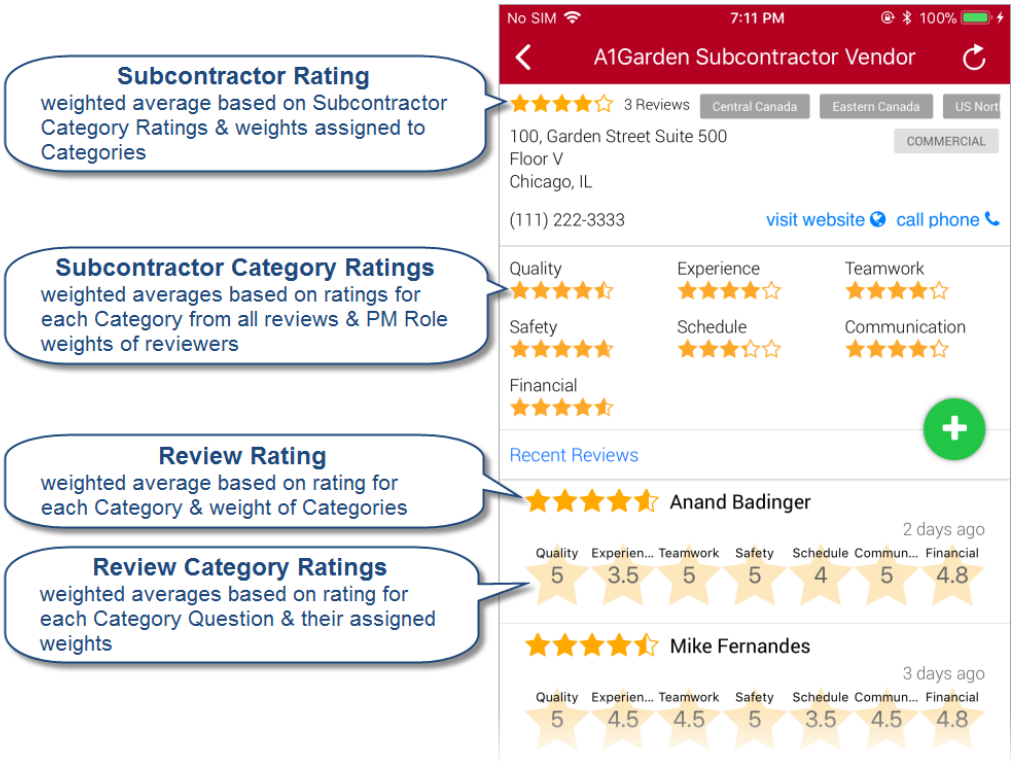


Tap [**Save Draft**] to save an unfinished review on the mobile device, or tap [**Submit**] to submit a completed review into the Enterprise system.

Saved draft reviews can be seen on the **Drafts** tab of the Unsubmitted Reviews screen:



Ratings Calculations



As shown above, there are 4 types of ratings for subcontractors and vendors. These ratings are all weighted averages, with higher level (overall) ratings based on lower level ratings and weights.

The way in which these weighted averages are calculated is the way weighted averages are typically calculated, as shown by the following example.

NOTE: Ratings are not required for each question. Therefore, if a rating is NULL, it is skipped and does not impact the calculation.

Example of Weighted Average Calculation

In this example, the **Subcontractor Rating** is calculated for a subcontractor based on the subcontractor's **Subcontractor Category Ratings** (weighted averages calculated earlier) and weights assigned to the 3 sample Categories.

Category	Weight	Max # of Stars	Weight x Max # Stars	Subcontractor Category Ratings	Rating x Weight
Quality	1	5	1 x 5 = **5**	**3.5** stars	3.5 x 1 = **3.5**
Experience	0.5	5	0.5 x 5 = **2.5**	**2** stars	0.5 x 2 = **1**
Teamwork	2	5	2 x 5 = **10**	**4** stars	2 x 4 = **8**
		TOTAL	**17.5**	**TOTAL**	**12.5**

As calculated above in the blue columns, based on the weight and maximum number of stars for each Category, a perfect overall rating would be **17.5**.

In the green columns, based on the **Subcontractor Category Ratings** and the Category weights, the overall rating for the subcontractor is **12.5**.

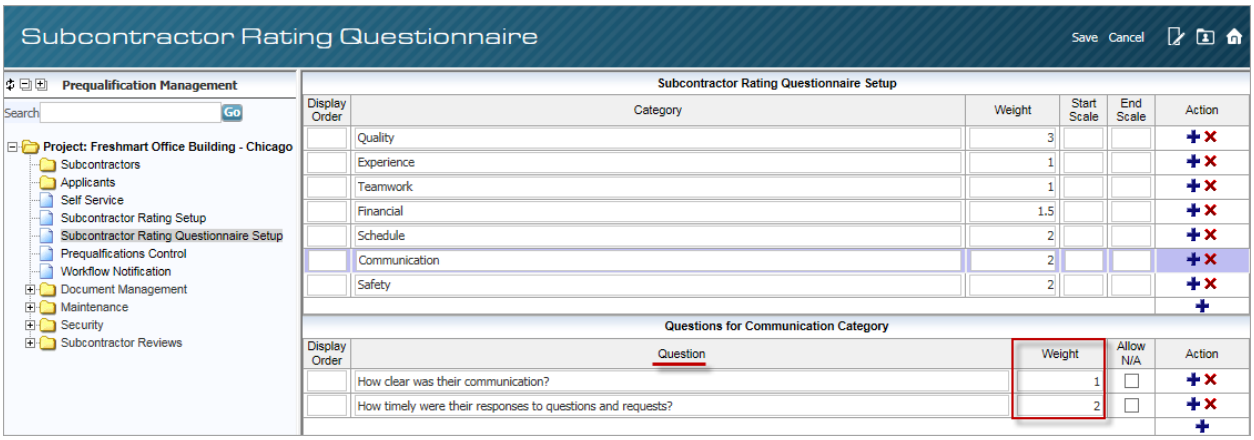
So, the subcontractor's percentage of a perfect score is: **12.5/17.5 = 71.4%**

Out of 5 stars, the subcontractor's overall rating (Subcontractor Rating) then is: **5** x **0.714** ≈ **3.6** stars

Review Category Ratings

The rating for each Category is a weighted average based on the rating for each Category Question and the weights assigned to the Category Questions.

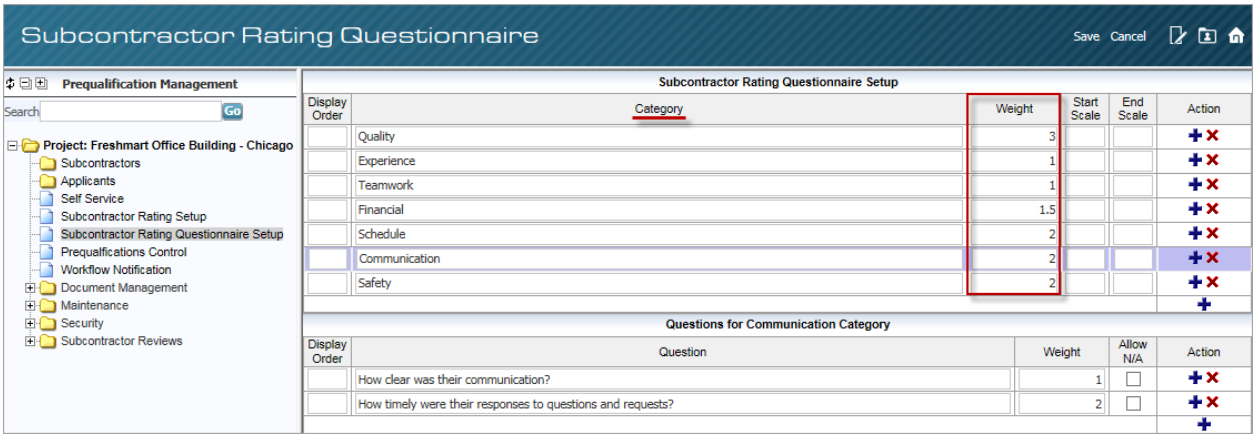
Category Question weights are set up in the Subcontractor Rating Questionnaire Setup screen:



Review Rating

The overall rating for a review is a weighted average based on the Review Category Ratings (calculated previously) and the weights assigned to the Categories.

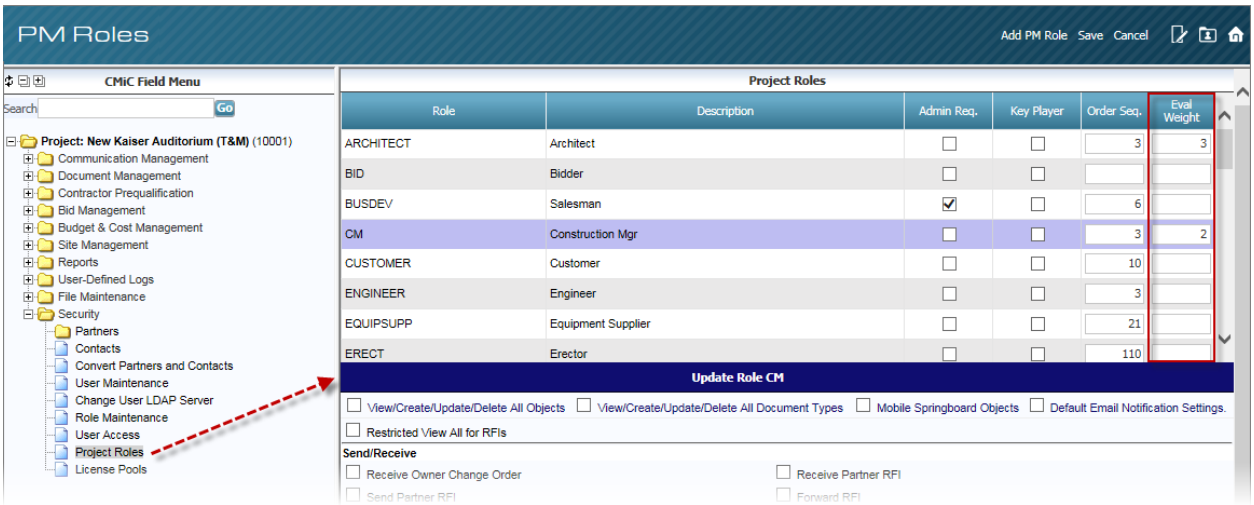
Category weights are set up in the Subcontractor Rating Questionnaire Setup screen:



Subcontractor Category Ratings

A subcontractor's overall rating for a Category is a weighted average based on the ratings for each Category from all reviews and the PM Role weights of the reviews.

PM Role weights are set up in the Project Roles screen of CMiC Field:

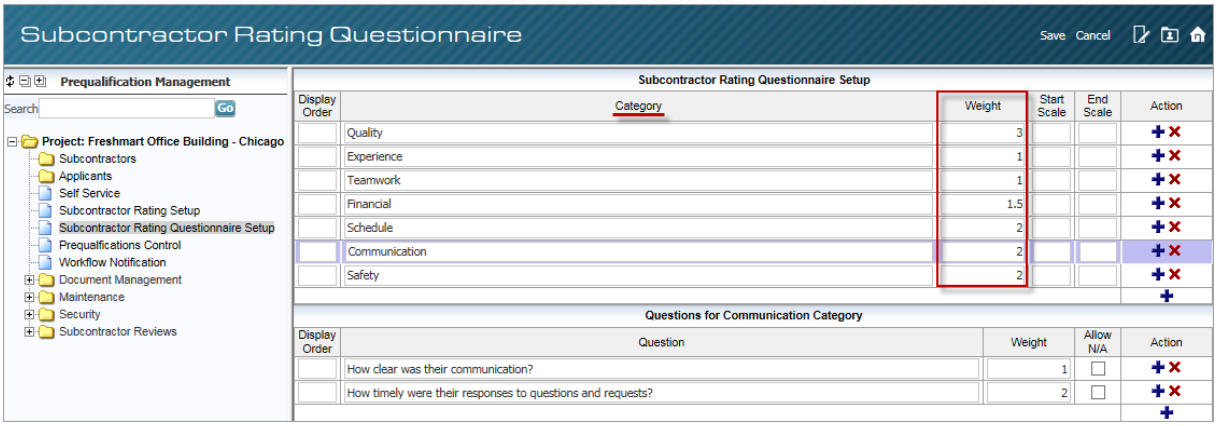


NOTE: CMiC Field is formerly known as xProjects/Project Management.

Subcontractor Rating

The overall rating for a subcontractor is a weighted average based on the Subcontractor Category Ratings (weighted averages calculated earlier) and the weights assigned to the Categories.

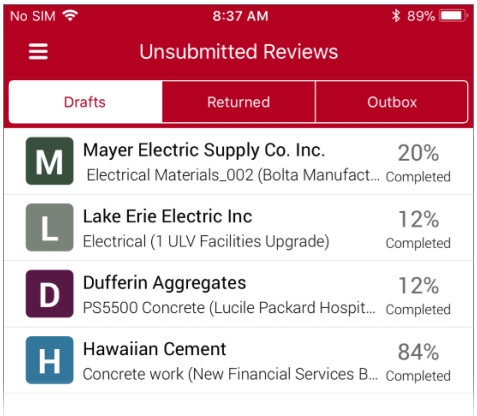
Category weights are set up in the Subcontractor Rating Questionnaire Setup screen:



Unsubmitted Reviews – Screen

Unsubmitted Reviews are further categorized into the **Drafts**, **Returned** and **Outbox** tabs.

Drafts – Tab

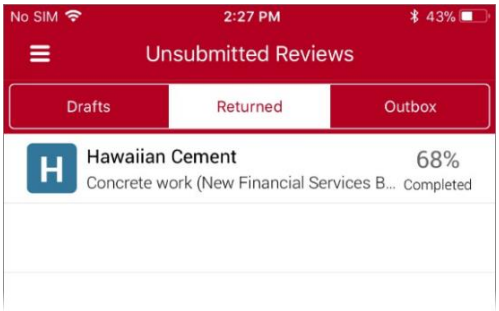


Drafts are incomplete reviews saved on the mobile device that the reviewer plans to return to at a later date.

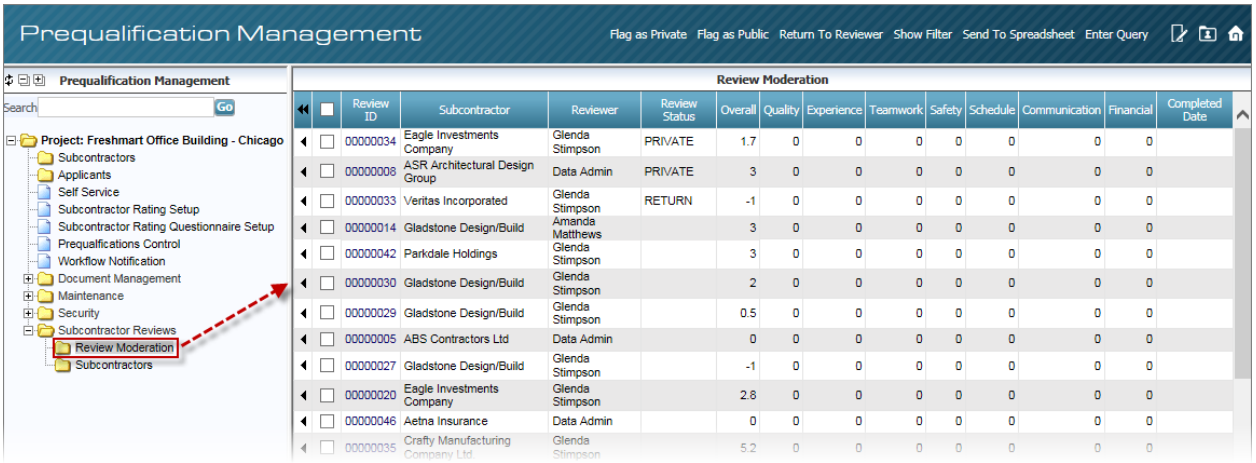
The displayed completed percentage is based on the number of answered questions out of the total number of questions.

To complete a review and submit it into the Enterprise system, tap an unsubmitted review, and in Enter Review screen, compete it and tap [**Submit**].

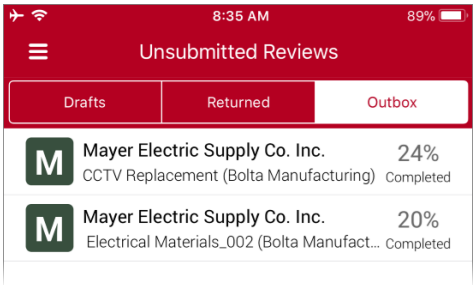
Returned – Tab



Returned Reviews are those which were previously submitted, then flagged as "Return To Reviewer" in the Prequalification Management's Review Moderation screen, shown below. This gives reviewers a chance to make changes to unaccepted reviews.

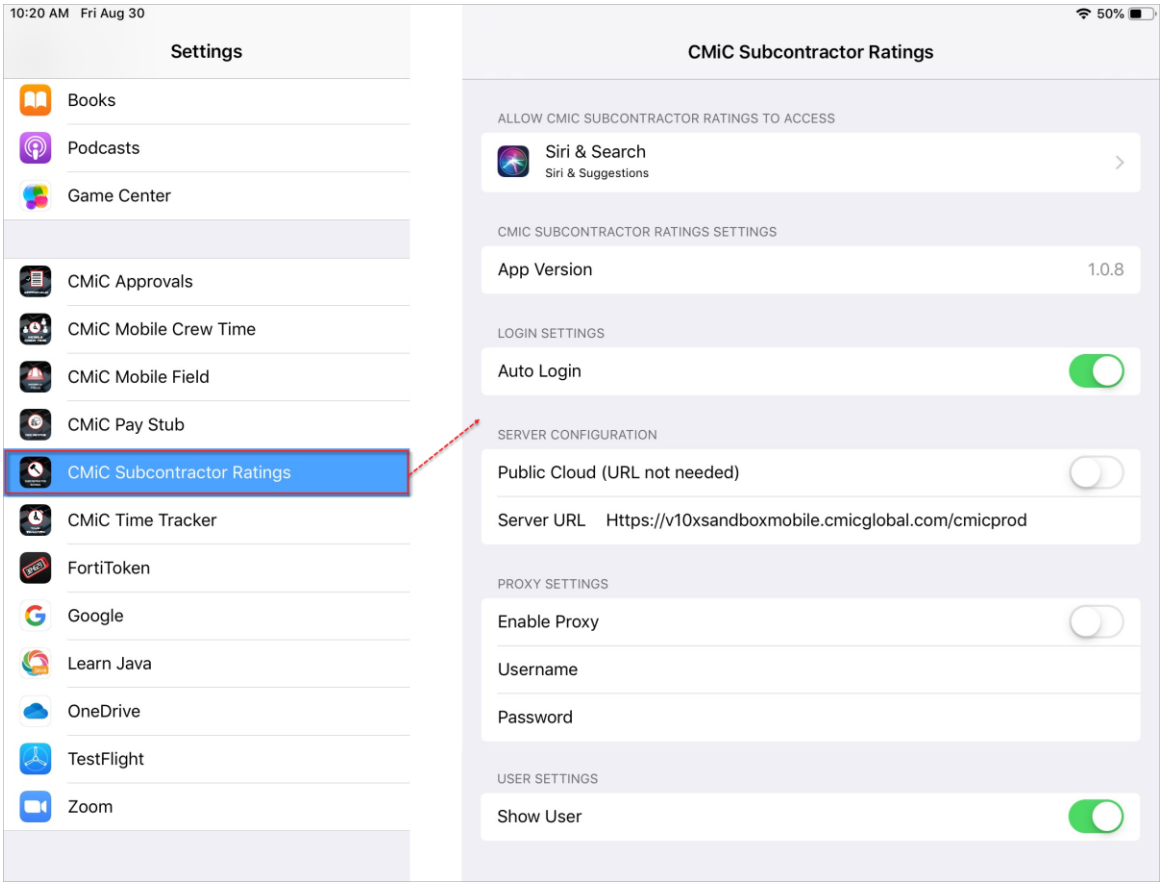


Outbox – Tab



This tab lists submitted reviews that have been temporarily saved on the mobile device when the app is in Offline Mode. When an internet connection is available and the app is in Online Mode, these reviews will automatically be submitted into the Enterprise system.

Mobile Settings – iOS



After installing the Subcontractor Ratings app, go to the Settings screen of the device to view and adjust its settings, and to set the Server URL for the mobile server your company is using.

Subcontractor Ratings Settings

Auto Login

If enabled, when the app is started, it automatically logs you in with your saved user ID and password, and if applicable, tenant ID (CMiC Cloud users).

Public Cloud (URL not needed)

If you are a CMiC Cloud client, this toggle must be enabled, as it turns on the multitenancy mode.

Server URL

Enter the URL for your company's mobile server. If you are a CMiC Cloud client, enable the Public Cloud toggle.

Enable Proxy

The Proxy Settings section is used if you are using a proxy server to connect to the internet. If a proxy server is being used, set this toggle to enabled, and enter the username and password for the proxy server.

Username (Proxy Server)

Username for proxy server.

Password (Proxy Server)

Password for proxy server.

Show User

This toggle is used to hide the reviewer's name. By default, this toggle is enabled, but the administrator can use their MDM to disable the toggle and hide the reviewers' names, if desired.

MDM Setup for Subcontractor Ratings Mobile

For MDM portals, the XML tags that the CMiC Subcontractor Ratings app supports are:

- publicCloud - for public cloud URL
- environmentURL - for server URL
- Show_User_Name - for the Show User toggle
  (Version 1.0.9 or later must be installed in order to use this tag.)

For example:

```
<dict>
  <key>environmentUrl</key>
  <string>Mobile_Server_URL</string>
  <key>Show_User_Name</key>
  <false/>
  <key>publicCloud</key>
  <false/>
</dict>
```

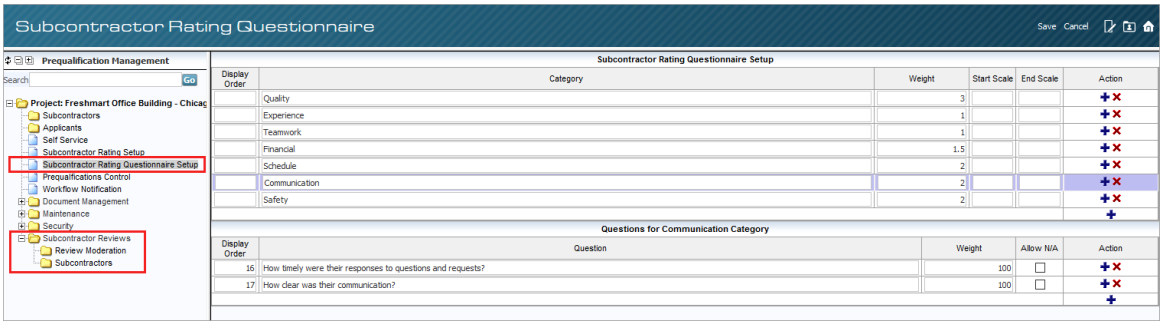
Tags have been added to set up the Public Cloud and Enterprise URL iPad settings.

For the Public Cloud setting, the XML should read **<true />** to turn it on, or **<false />** to turn it off.

To specify the Enterprise URL, replace the "***Mobile_Server_URL***" text with your company's mobile server's URL.

Setup & Administration

Overview – Setup & Administration



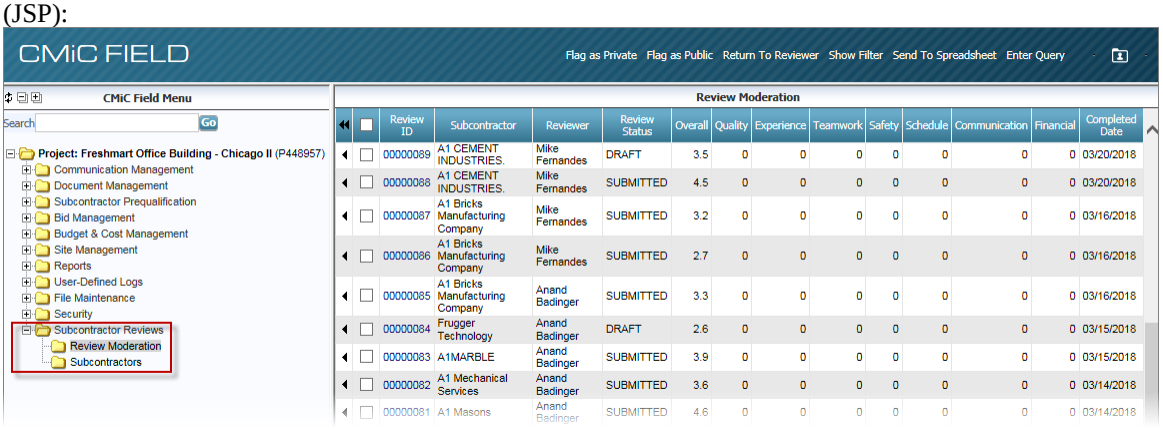
Subcontractor Ratings Mobile functionality in Subcontractor Prequalification JSP module

This section provides details about setting up the user-defined rating categories and questions (e.g., Quality, Experience, Communication…) for Subcontractor Ratings (Mobile) in the Subcontractor Prequalification JSP module, shown above, and about monitoring reviews.

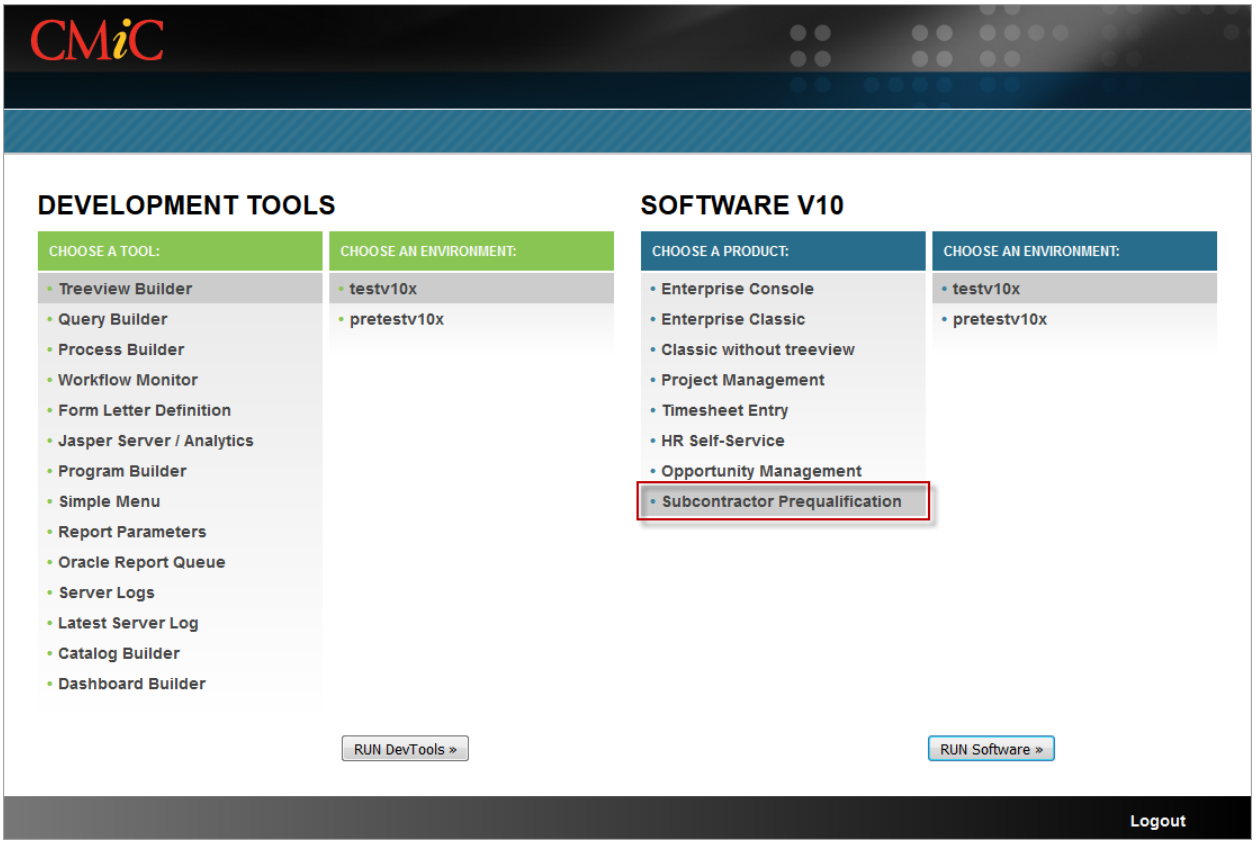
Assumptions:

- Category items will be fixed and defined by the client. These will not be changed once defined.
- Category weights should all be the same.
- Questions are fixed and defined by clients and will not be changed or altered in any way once defined.
- The scale starts at 0 and ends at 5.
- The ratings are not required for each question, therefore if the rating is null it should be skipped and does not impact the calculation.

NOTE: the Subcontractor Reviews functionality for monitoring reviews is also available in CMiC Field (JSP):

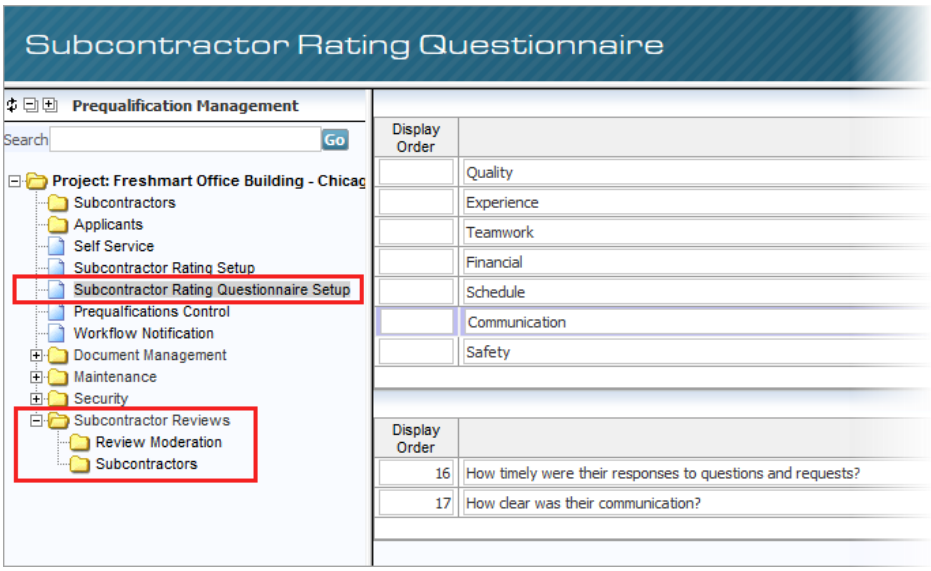


Subcontractor Prequalification – JSP



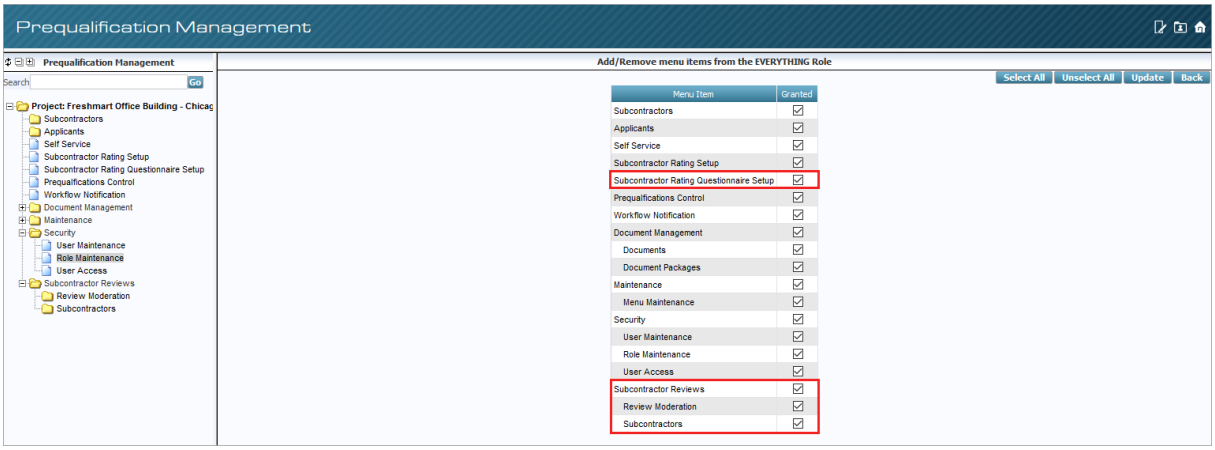
The Subcontractor Prequalification JSP module can be launched using your CMiC Launch Page, as shown in the above sample of a CMiC Launch Page.

Security Setup for Subcontractor Ratings Mobile

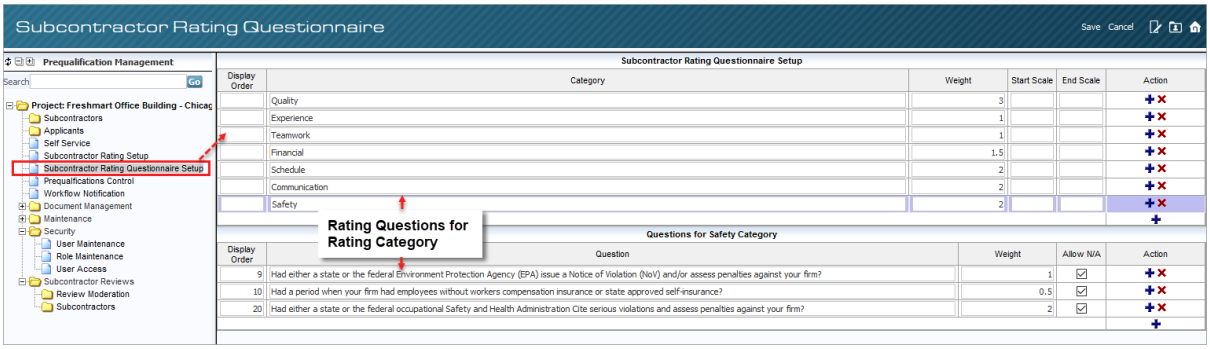


To grant a user access to the Subcontractor Rating Questionnaire Setup, Review Moderation, and Subcontractors screens (links framed above), use the Role Maintenance screen's Assign Menu Items option, shown below, to grant their JSP security role access to these screens:

Framed in the screenshot below are the menu items for the Subcontractor Ratings Mobile screens:



Subcontractor Rating Questionnaire Setup



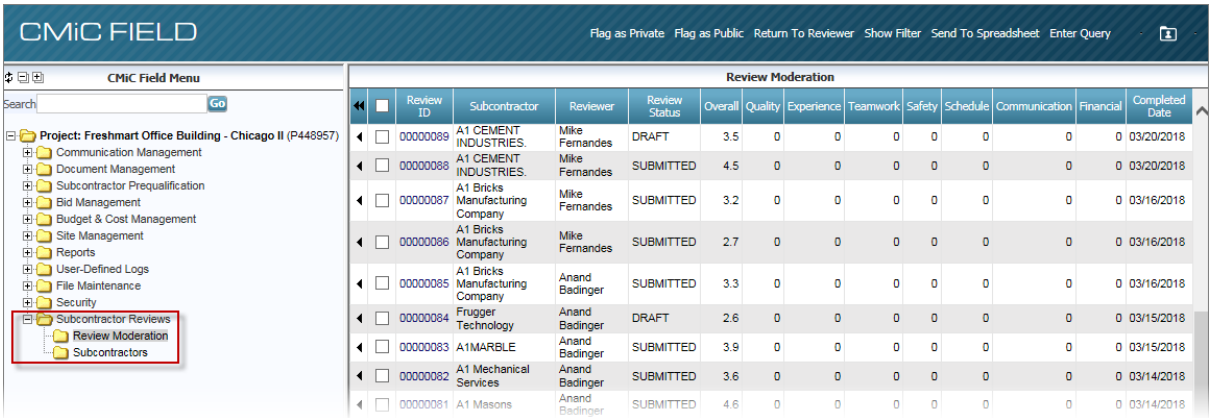
This screen is used to set up the rating categories, and where applicable, to set up rating questions for categories.

NOTE: By default, ratings are not required for each question. Therefore, if a rating is null, it is skipped and does not impact the calculation.

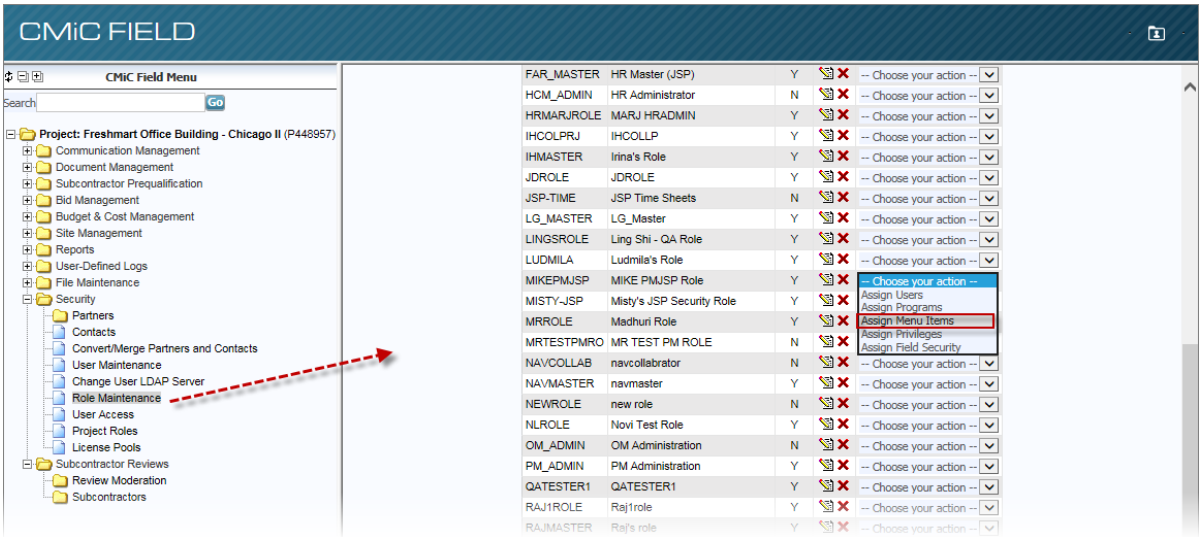
CMiC Field – JSP

This section contains details about the Subcontractor Ratings Mobile functionality and setup in the CMiC Field module.

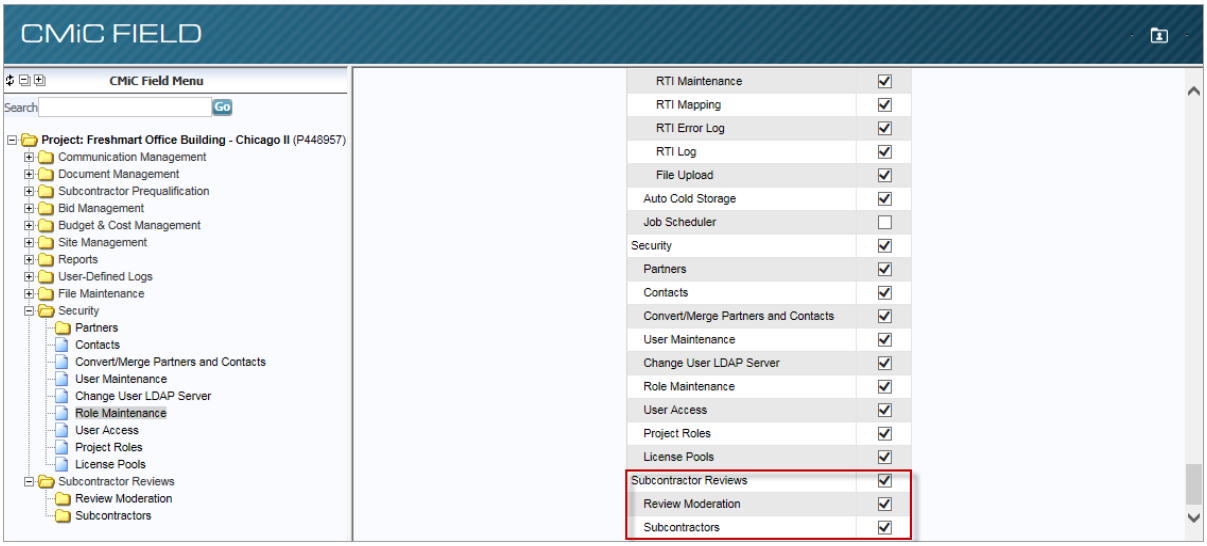
Security Setup for Subcontractor Ratings Mobile – CMiC Field



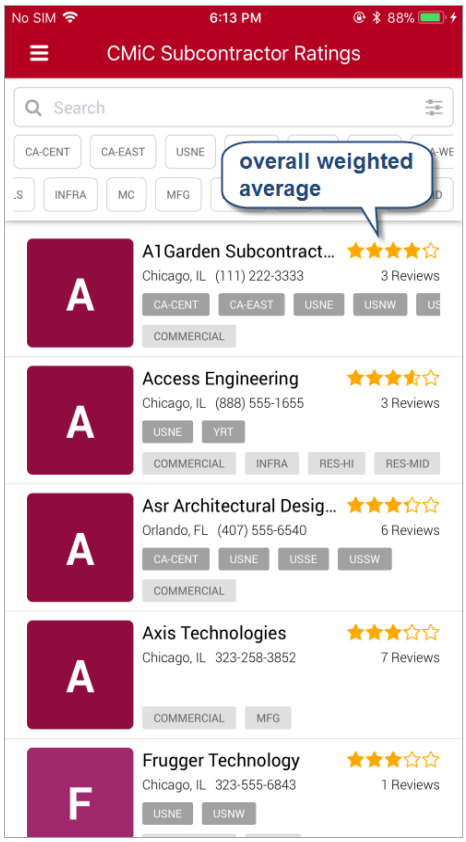
To grant a user access to the Review Moderation and Subcontractors screens (links framed above), use the Role Maintenance screen's Assign Menu Items option, shown below, to grant their JSP Security Role access to these screens:

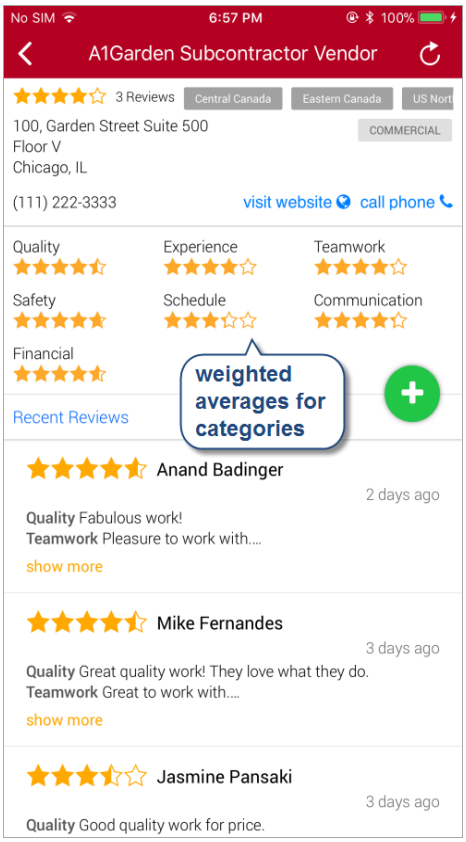


Framed in the screenshot below are the menu items for the Subcontractor Ratings Mobile screens in CMiC Field:



Setup for Reviewer Weight by Project Role – CMiC Field

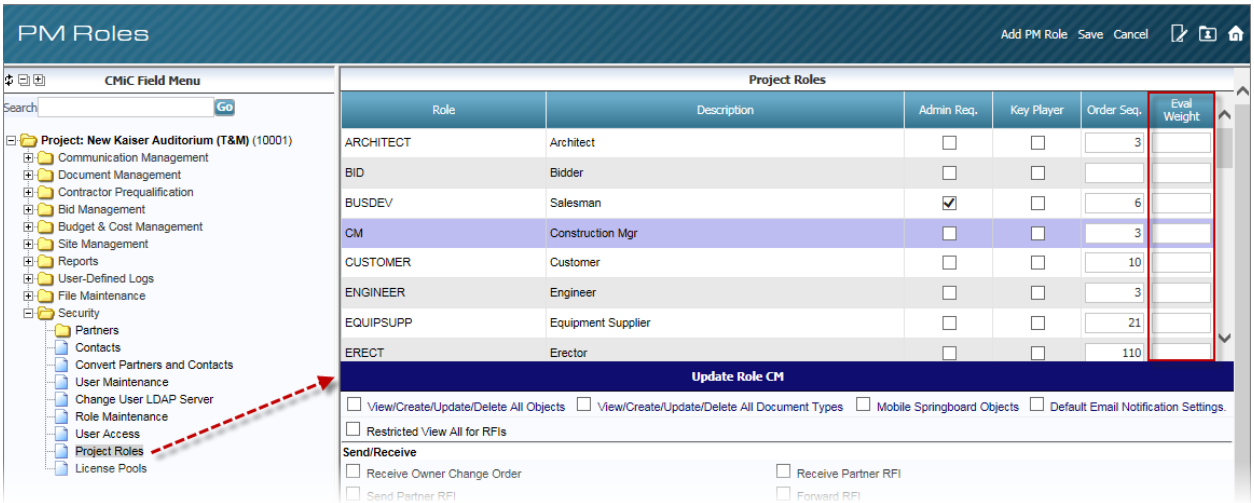




In calculating a subcontractor's overall weighted average rating (sample shown above on left), and weighted average rating per review category (sample shown above on right), the PM role of the reviewers will impact the calculation if reviewer weights have been set up for PM roles.

To set up reviewer weights for PM roles, use the Project Roles screen in the CMiC Field JSP module. As shown below, the Project Roles screen has the Eval Weight column to set the reviewer weight for each PM role. As an

example, a project manager could have a weight of 3, and a site supervisor could have a weight of 1, resulting in the project manager's ratings impacting weighted averages 3 times as much.



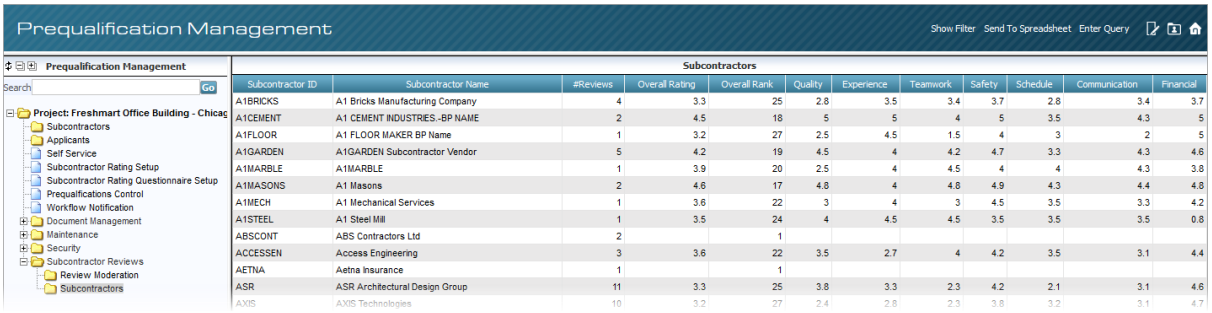
Review Moderation – Screen

This screen is updated by changes made in the mobile app.

The features of this screen are:

- A log view of all the reviews in the system. Initially the reviews are taken from the Subcontractor Prequalification – Project History > Rate It link
- On drill-down, it provides a detailed view of the review with the option to "Flag as Private", "Flag as Public", and "Return to Reviewer".
- The "Flag as Private" option makes the review visible only to the moderator.
- The "Return to Reviewer" option allows the reviewer to modify their response and re-submit.

Subcontractors – Screen



Subcontractors

Subcontractor ID	Subcontractor Name	#Reviews	Overall Rating	Overall Rank	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial
A1BRICKS	A1 Bricks Manufacturing Company	4	3.3	25	2.8	3.5	3.4	3.7	2.8	3.4	3.7
A1CEMENT	A1 CEMENT INDUSTRIES.-BP NAME	2	4.5	18	5	5	4	5	3.5	4.3	5
A1FLOOR	A1 FLOOR MAKER BP Name	1	3.2	27	2.5	4.5	1.5	4	3	2	5
A1GARDEN	A1GARDEN Subcontractor Vendor	5	4.2	19	4.5	4	4.2	4.7	3.3	4.3	4.6
A1MARBLE	A1MARBLE	1	3.9	20	2.5	4	4.5	4	4	4.3	3.8
A1MASONS	A1 Masons	2	4.6	17	4.8	4	4.8	4.9	4.3	4.4	4.8
A1MECH	A1 Mechanical Services	1	3.6	22	3	4	3	4.5	3.5	3.3	4.2
A1STEEL	A1 Steel Mill	1	3.5	24	4	4.5	4.5	3.5	3.5	3.5	0.8
ABSCONT	ABS Contractors Ltd	2		1							
ACCESSEN	Access Engineering	3	3.6	22	3.5	2.7	4	4.2	3.5	3.1	4.4
AETNA	Aetna Insurance	1		1							
ASR	ASR Architectural Design Group	11	3.3	25	3.8	3.3	2.3	4.2	2.1	3.1	4.6
AXIS	AXIS Technologies	10	3.2	27	2.4	2.8	2.3	3.8	3.2	3.1	4.7

This screen shows a log view of subcontractors along with their ratings. It is important to note that zeros will not impact the subcontractor's score. It too is updated by changes made in the Mobile app.

Overall Rank

The overall rank for subcontractors is based on their overall rating in relation to that of the other subcontractors.

In case of ties, the tied subcontractors get the same rank, and the ranks that would have been used if there were no ties are not used. For instance, if three vendors are tied at rank 4, then all three get rank 4 and there is no rank 5 and 6, and the next subcontractor gets rank 7. Note that this is how the Olympics handles ties. If two teams tie at first:

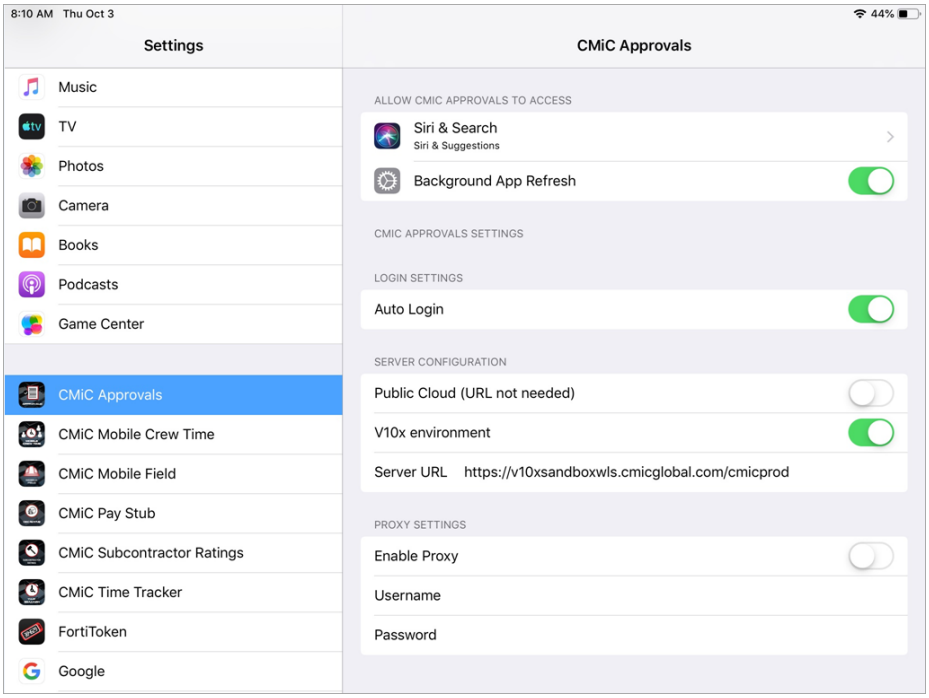
- both get gold
- no one gets silver
- third best gets bronze

NOTE: Inline filtering does not affect overall rank values, so the overall rank values shown for a subset of subcontractors when an inline filter is in use are the values that would be shown for the full set of subcontractors when no filter is used.

CMiC Mobile Approvals – iPad

Setup – Settings Screen

The Setup screen can be accessed via the Settings app and navigating to CMiC Approvals on the left navigation panel.



Login Settings – Section

Auto Login – Toggle

Enable this field to turn on auto login for the CMiC Approvals app.

Server Configuration – Section

Public Cloud (URL not needed) – Toggle

Enable this field if using Cloud.

V10x environment – Toggle

Enable this field if V10x is being used as the backend environment or disable this field if R12 is being used.

NOTE: If a change is made to this toggle, the app must be shut down and reloaded for the change to take effect.

Server URL

The Approvals app does not use the Mobile server like Mobile Field and the other mobile apps. It connects to an app server. The URL would be the root URL of what the user sees when looking at their Workflow Notifications screen in desktop. For example, if their browser shows http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole?_adf.ctrl-state=yrbefigvb_6, then for Mobile Approvals they will use http://test4v10.cmic.ca:7785/cmictestv10x/.

MDM Setup for CMiC Mobile Approvals

For MDM portals, the XML tags that the CMiC Mobile Approvals app supports are:

- publicCloud - for public cloud URL
- environmentURL - for server URL
- v10xEnvironment – for v10x environment

For example:

```
<dict>
  <key>environmentUrl</key>
  <string>App_Server_URL</string>
  <key>publicCloud</key>
  <false/>
  <key>v10xEnvironment</key>
  <true/>
</dict>
```

Tags have been added to set up the Public Cloud and Enterprise URL iPad settings:

- For the Public Cloud setting, the XML should read **<true/>** to turn it on, or **<false/>** to turn it off.
- To specify the Enterprise URL, replace the "***App_Server_URL***" text with your company's app server's URL.

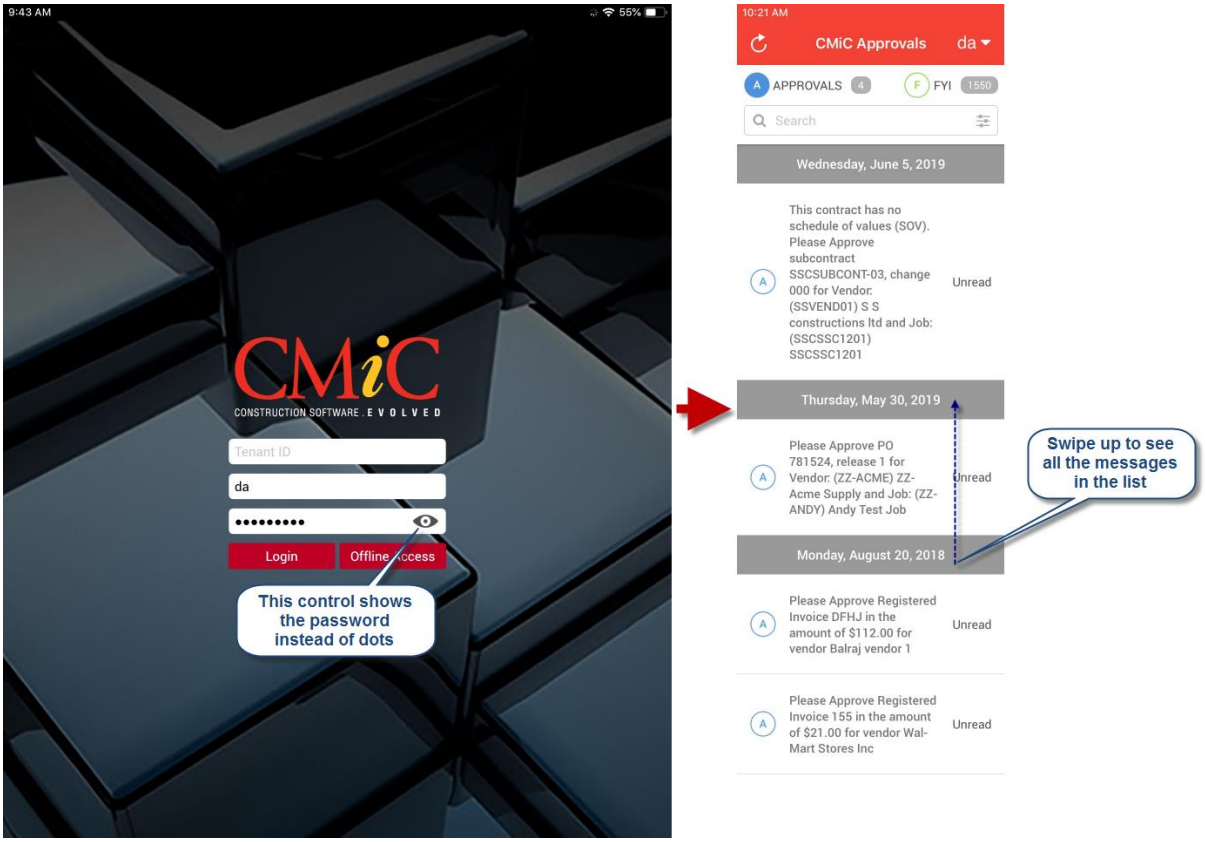
For the v10x environment setting, the XML should read **<true/>** to turn it on, or **<false/>** to turn it off.

Proxy Settings – Section

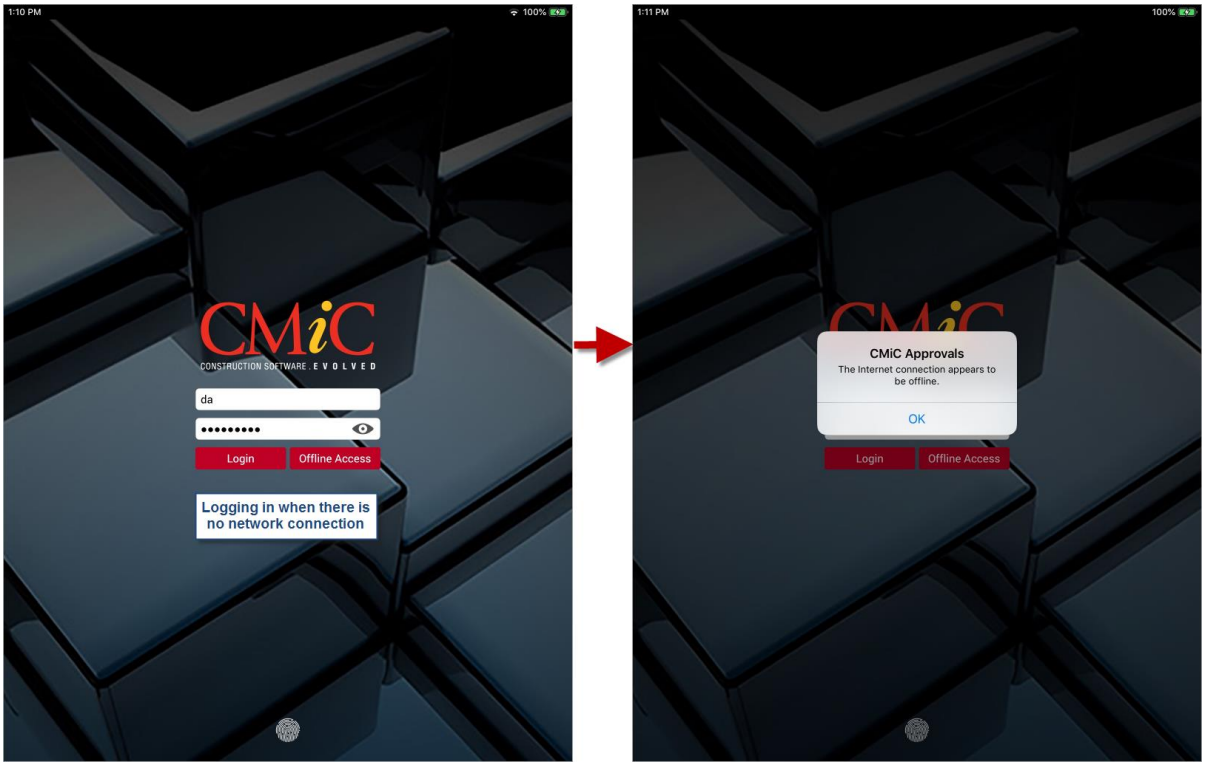
If the application requires access to the proxy server, set the Enable Proxy toggle to on and enter the credentials to access the proxy server.

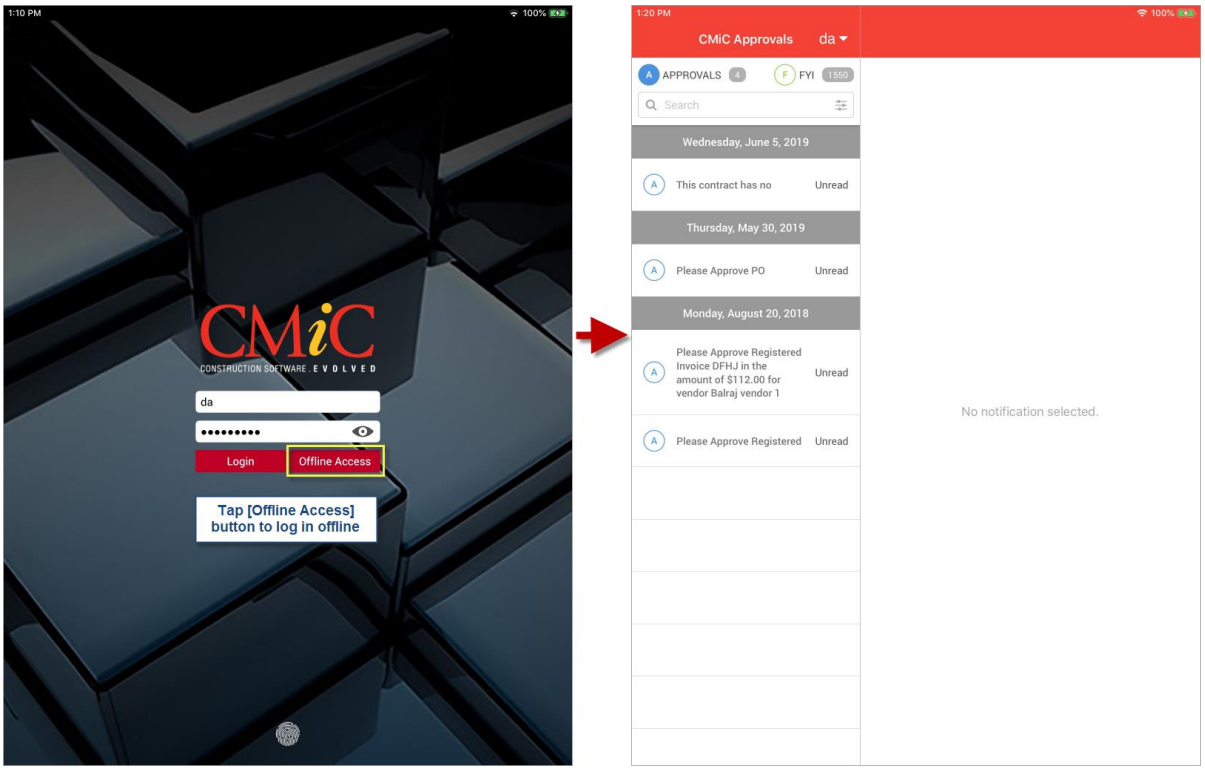
Login

Enter the tenant ID (for CMiC Cloud clients), username, and password to access CMiC Enterprise, and tap [**Log In**].


9:43 AM
55%
CMiC
CONSTRUCTION SOFTWARE . E V O L V E D
Tenant ID
da
Login
Offline Access
This control shows the password instead of dots
10:21 AM
CMiC Approvals
da
APPROVALS 4
FYI 1550
Search
Wednesday, June 5, 2019
This contract has no schedule of values (SOV). Please Approve subcontract SSCSUBCONT-03, change 000 for Vendor: (SSVEND01) S S constructions ltd and Job: (SSCSSC1201) SSCSSC1201
Unread
Thursday, May 30, 2019
Please Approve PO 781524, release 1 for Vendor: (ZZ-ACME) ZZ-Acme Supply and Job: (ZZ-ANDY) Andy Test Job
Unread
Swipe up to see all the messages in the list
Monday, August 20, 2018
Please Approve Registered Invoice DFHJ in the amount of $112.00 for vendor Balraj vendor 1
Unread
Please Approve Registered Invoice 155 in the amount of $21.00 for vendor Wal-Mart Stores Inc
Unread

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





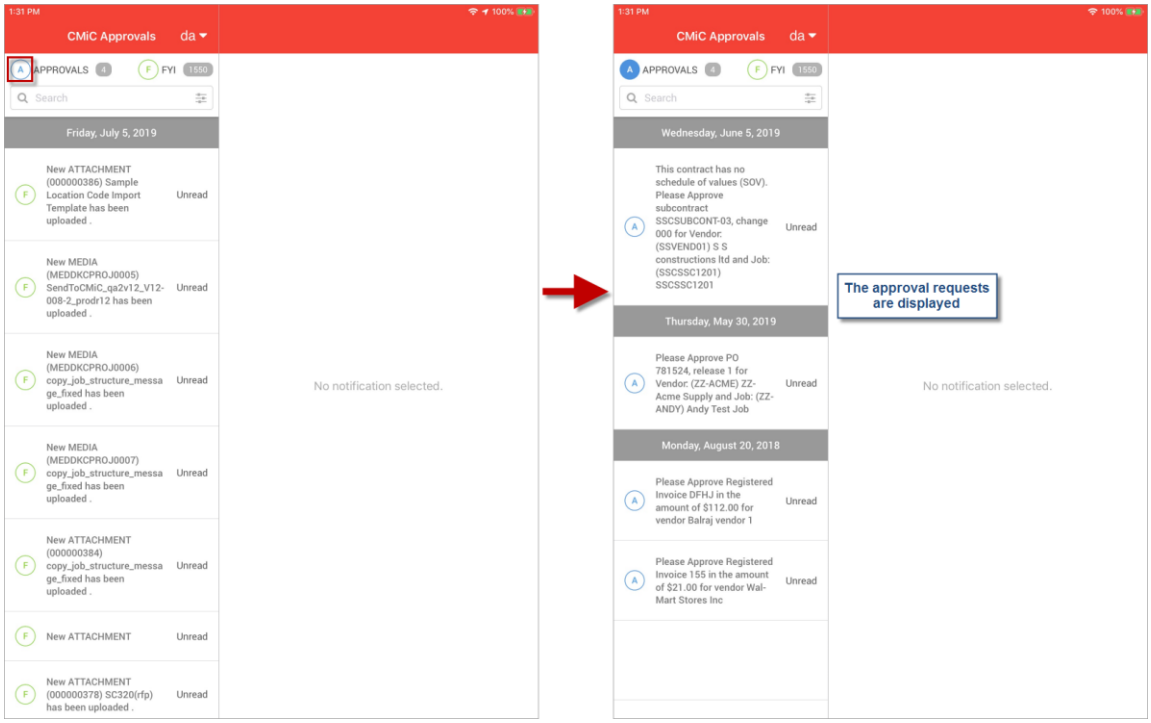
Main Screen

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

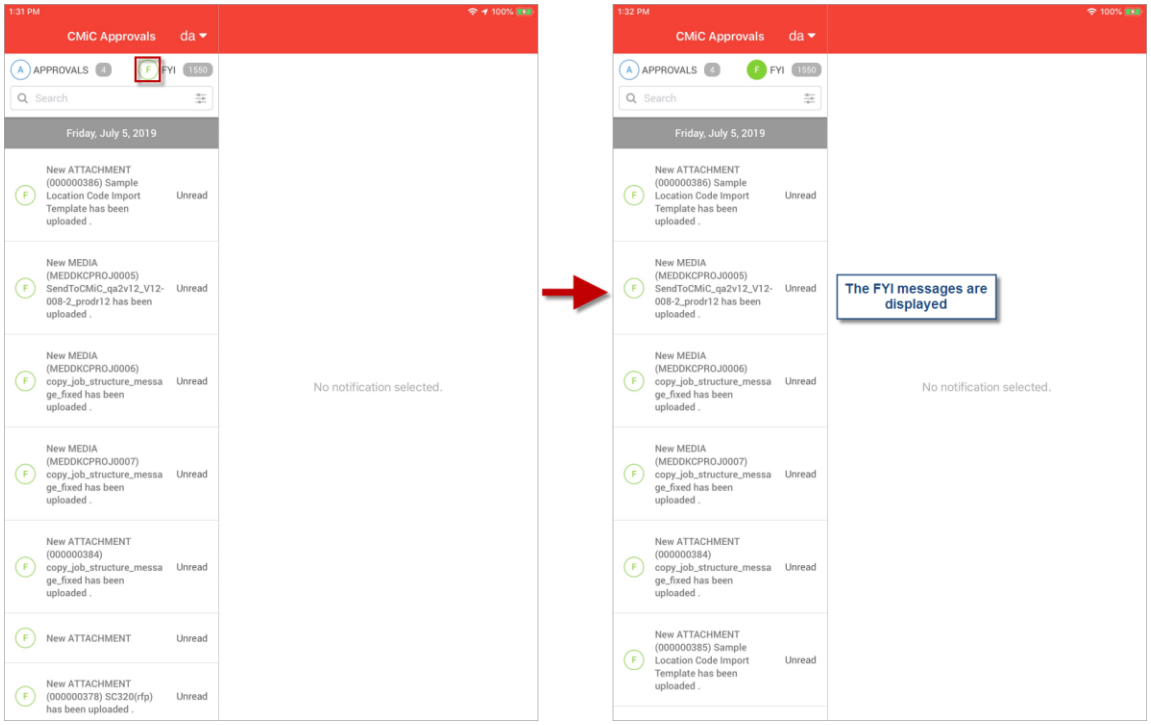
Filter Options

Three filters can be applied to the list:

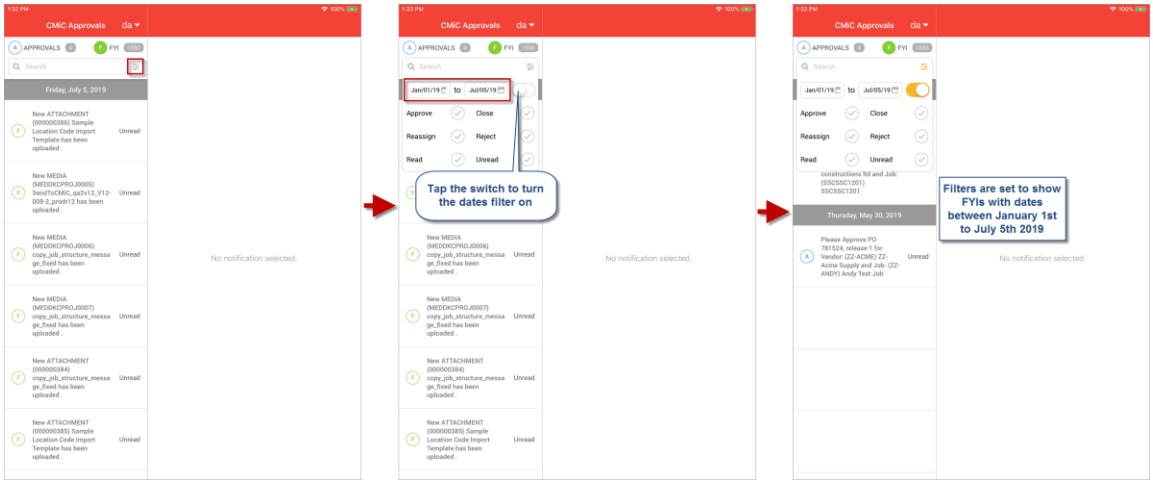
Display Approval Requests



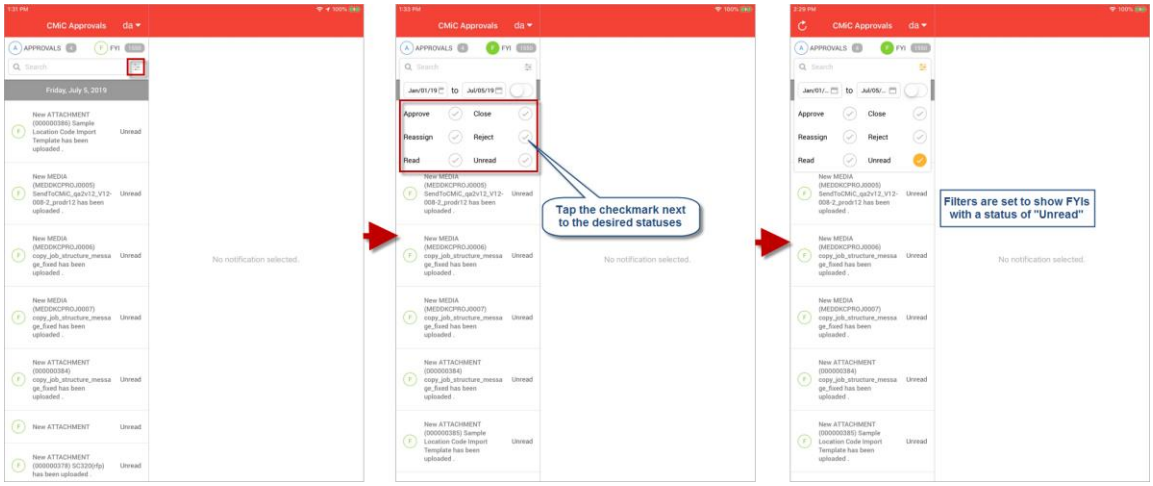
Display FYI Messages



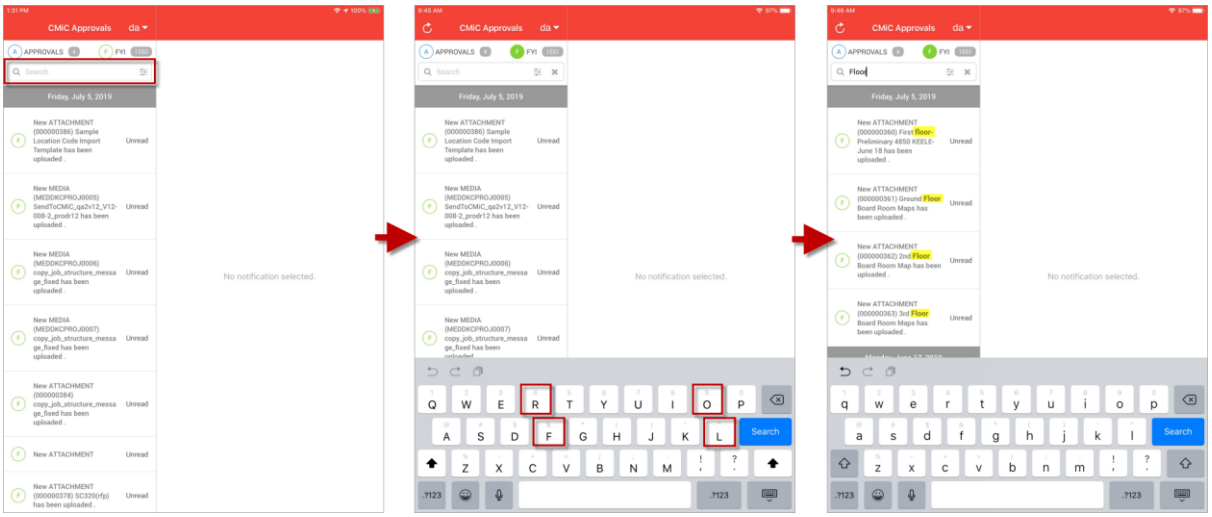
Filter List by Date Range



Filter List by Status

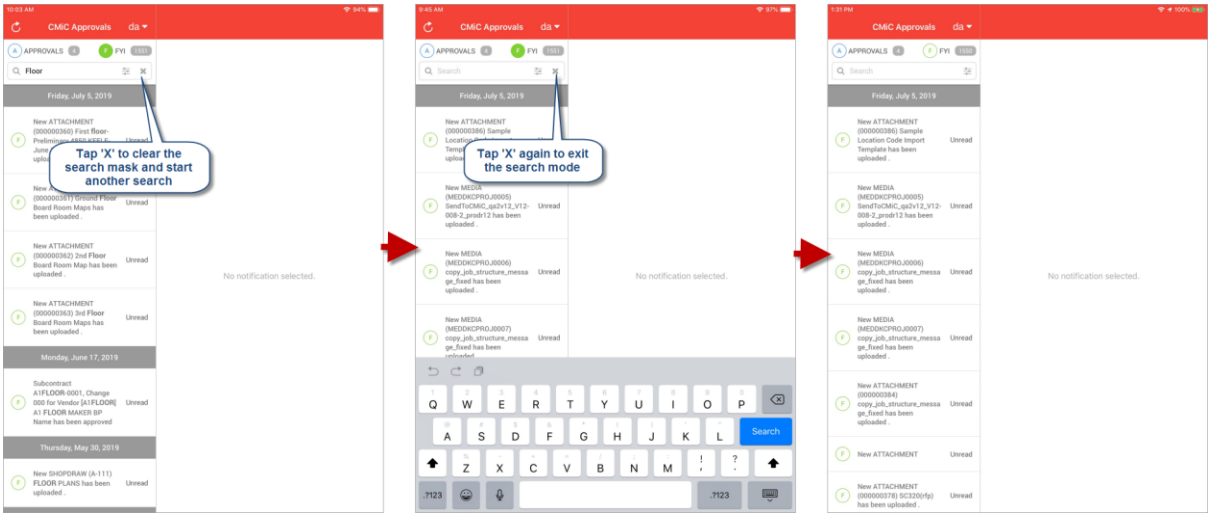


Searches

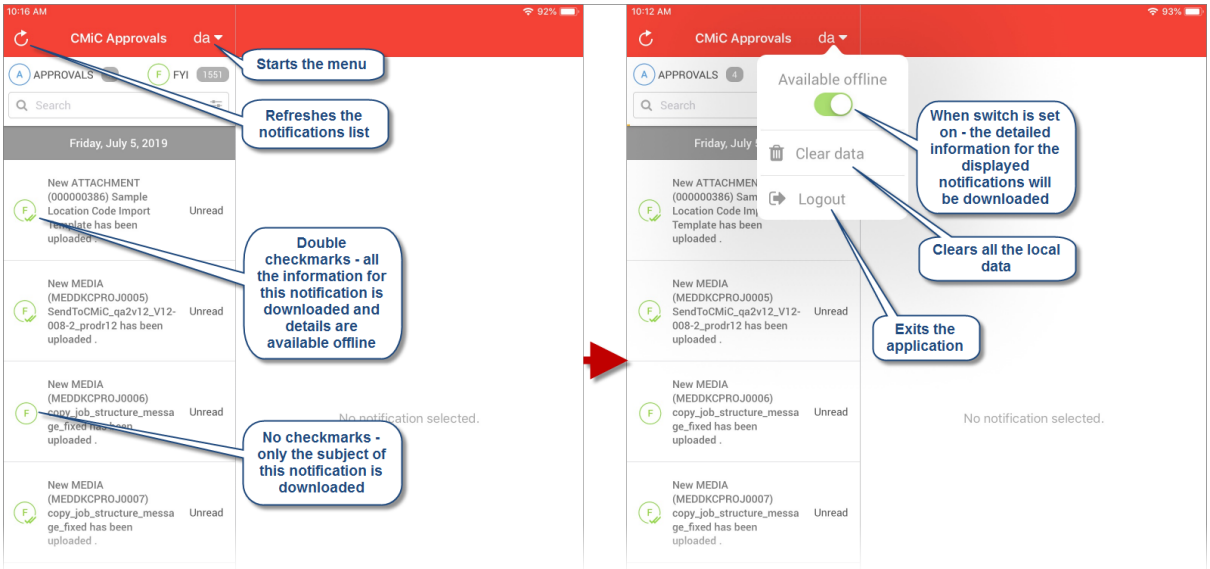


To search for an item, tap the Search field and enter the search text. Matched records will be displayed while typing.

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



Refresh, Drop-Down Menu & Indicators



Refresh

Updates the notification list from the server.

da Drop-Down Menu

Available Offline

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

No checkmarks – only subject of the notification is downloaded.

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

Clear Data

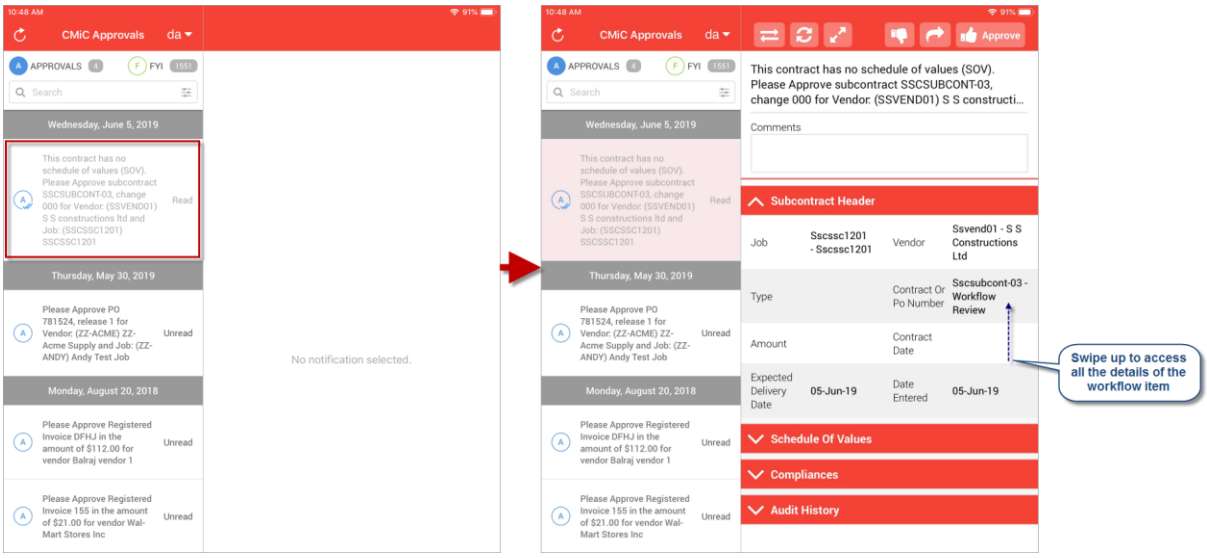
Deletes all the local data for this user. Tap the Refresh icon to load the notification list.

Log Out

Exits the application.

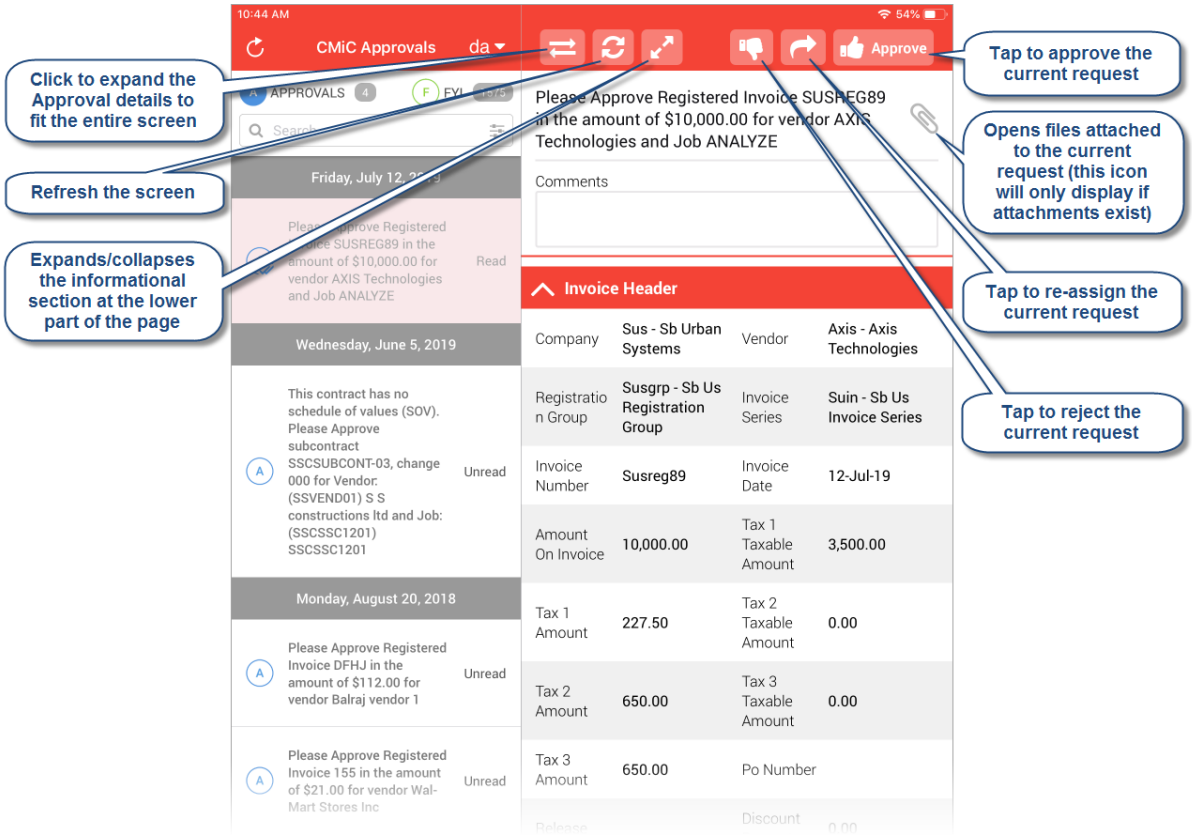
Working with Notifications

Approvals



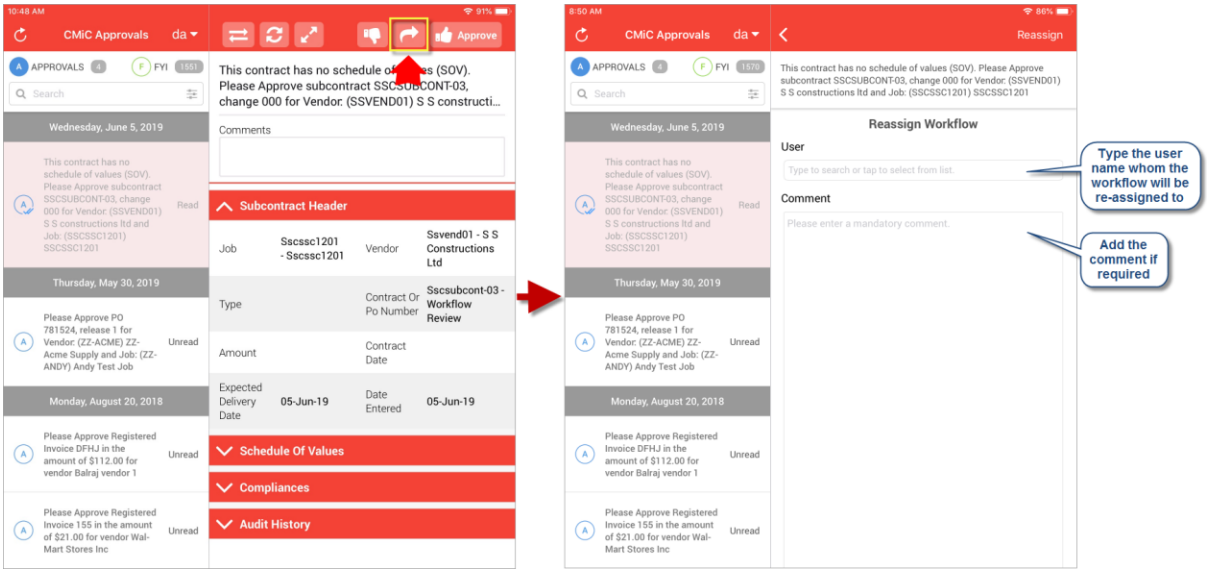
Tap a request to access the details screen, which consists of three sections: a section of controls (along top of the screen), a section for the message, comments, and an icon to access the files attached to the workflow, and the workflow information in the lower part of the screen.

Working with Notifications

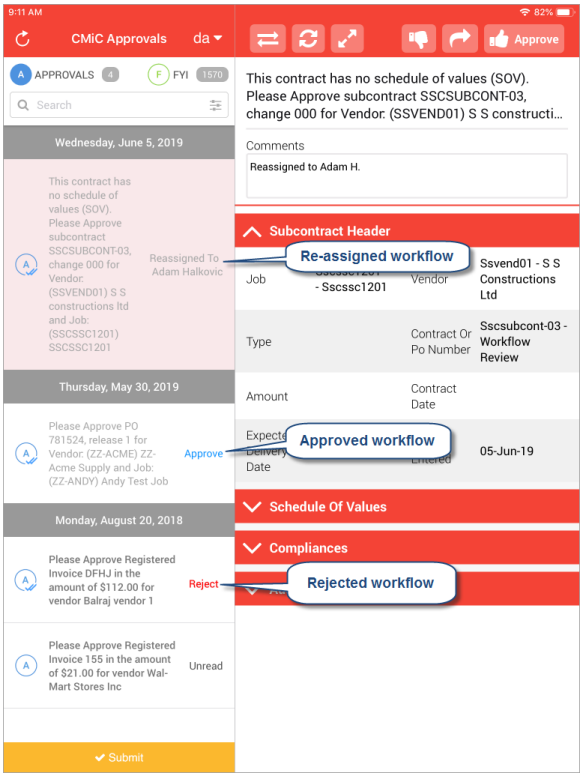


Depending on the settings in the Imaging Controls or Workflow Notifications and Display options, a comment may need to be entered when approving or rejecting the workflow.

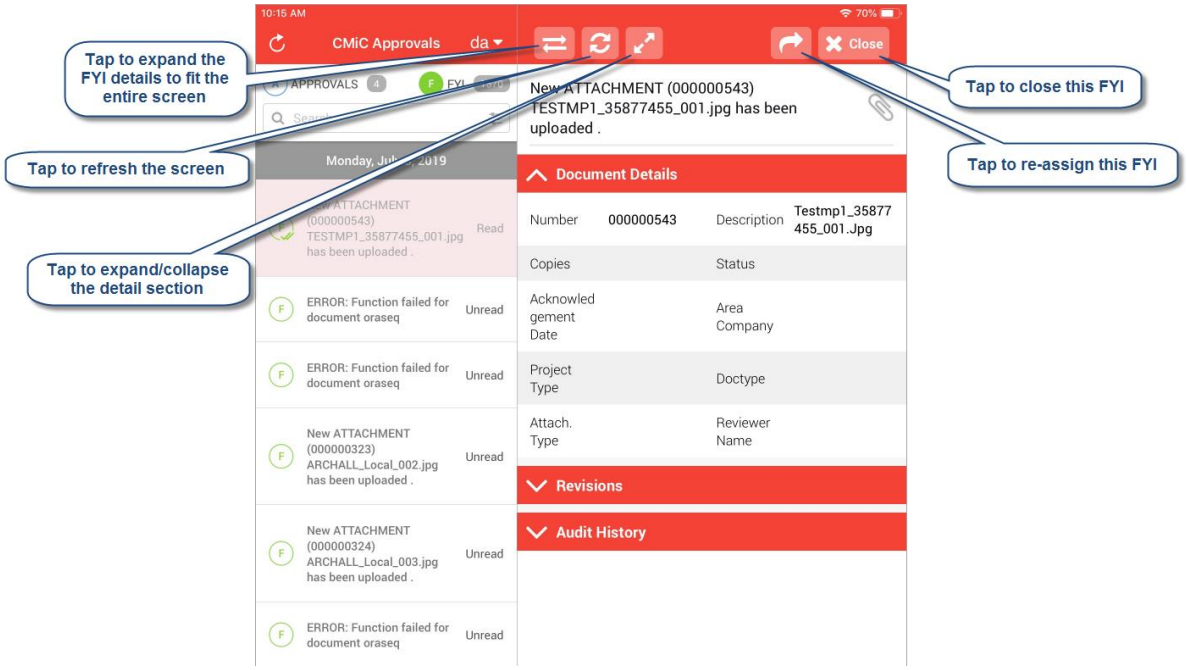
Upon tapping the Re-assign icon, shown below, the application opens the screen where the workflow can be re-assigned to another user:



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

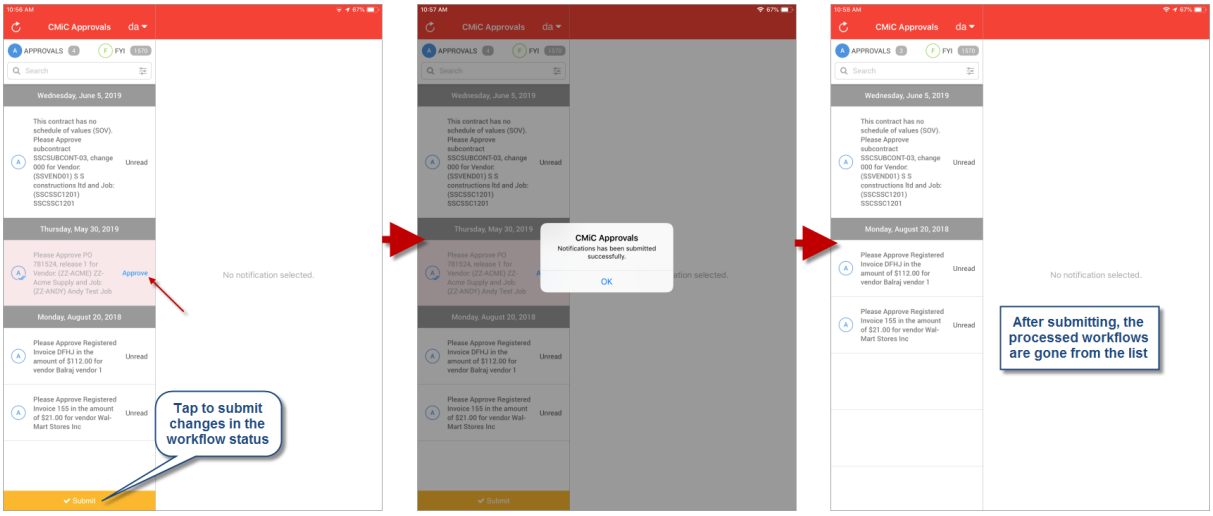


FYI Messages



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

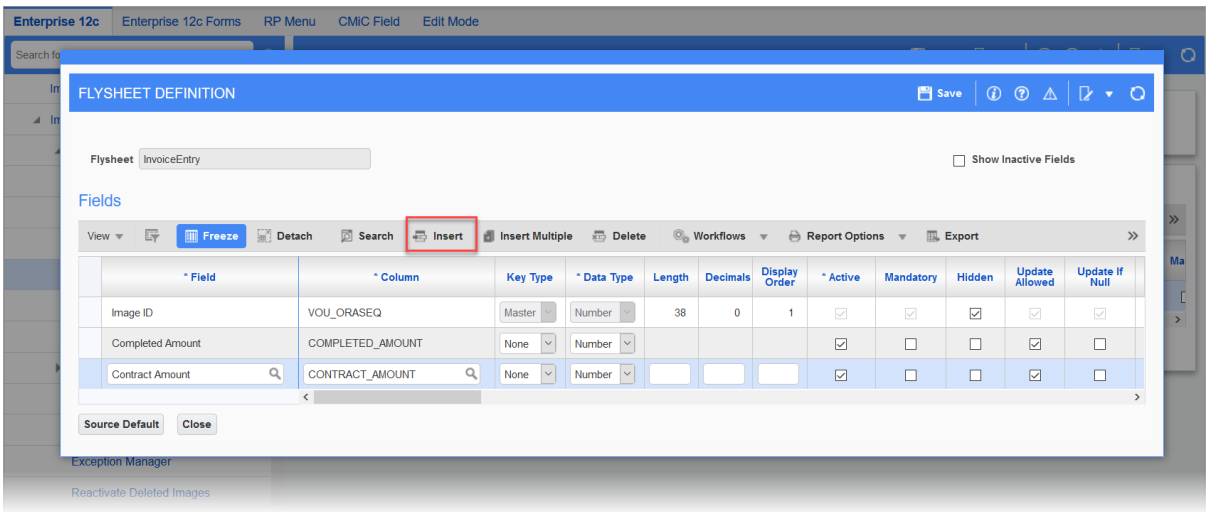
Submitting Changes



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

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

Flysheet Setup



Pgm: IMGFLYFM – Flysheet Definition; standard Treeview path: Imaging > Setup > Flysheets – [Fields] button

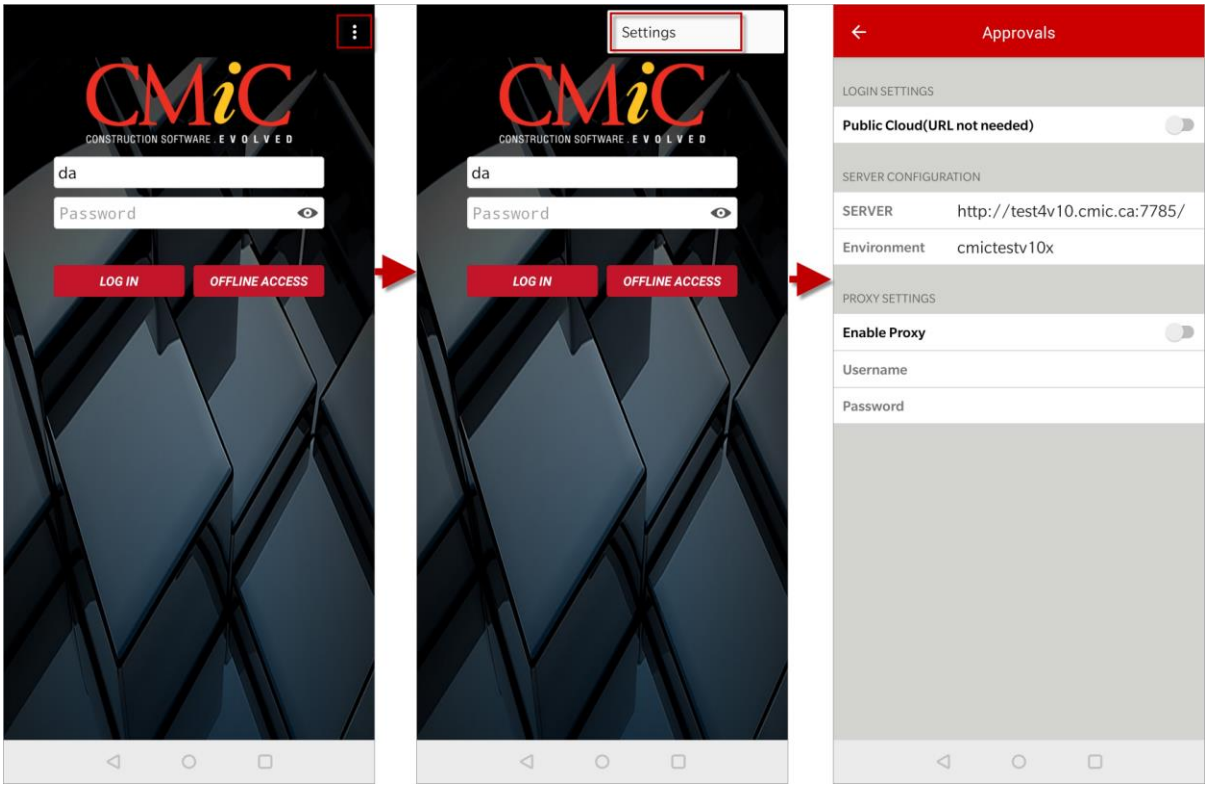
For fields to be displayed in the CMiC Mobile Approvals application, users can add/edit the columns in the flysheet definition, as shown in the screenshot above.

NOTE: In the Workflow Notifications List screen on the web application, users only have privileges to view the data, not edit it, so all available fields will show on the screen. However, for the CMiC Mobile Approvals application, data is taken from the flysheet setup.

CMiC Mobile Approvals – Android

Setup – Settings Screen

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



Login Settings – Section

Public Cloud (URL not needed)

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

Server Configuration – Section

Server

The Approvals app does not use the Mobile server like Mobile Field and the other mobile apps. It connects to an app server. The URL will be the root URL of what the user sees when looking at their Workflow Notifications screen in desktop, excluding the environment. For example, if their browser shows http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole?_adf.ctrl-state=yrbefigvb_6, then for Mobile Approvals the root URL

will be http://test4v10.cmic.ca:7785/cmictestv10x/. Without the environment, the URL will be http://test4v10.cmic.ca:7785/.

NOTE: For MDM portals, the XML tags that the CMiC Approval app supports are:

- publicCloud - for public cloud URL
- environmentURL - for server URL

Environment

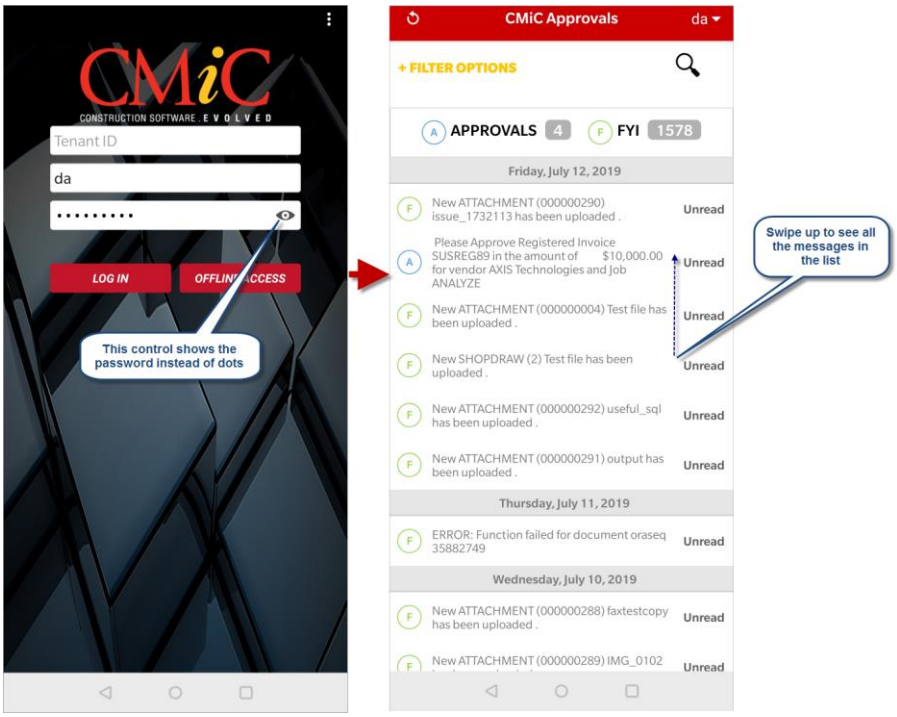
Enter the part of the URL for the environment. For example, if the root URL is http://test4v10.cmic.ca:7785/cmictestv10x/, the environment is "cmictestv10x". Please contact the administrator for configuration of the mobile server access for the company.

Proxy Settings – Section

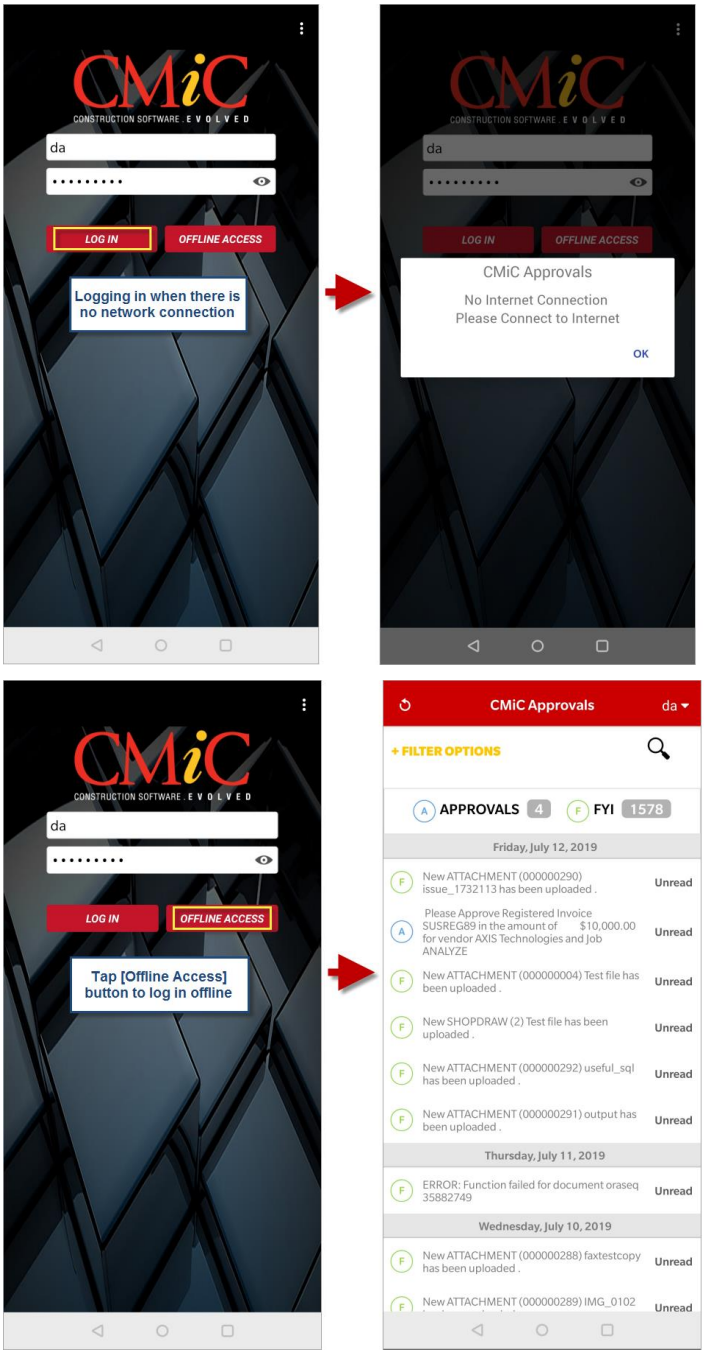
If the application requires access to the proxy server, enable the Enable Proxy switch and enter the credentials to access the proxy server.

Login

Enter the tenant ID (for CMiC Cloud clients), the username, and the password that is used to access CMiC Enterprise, and tap [**Log In**].



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



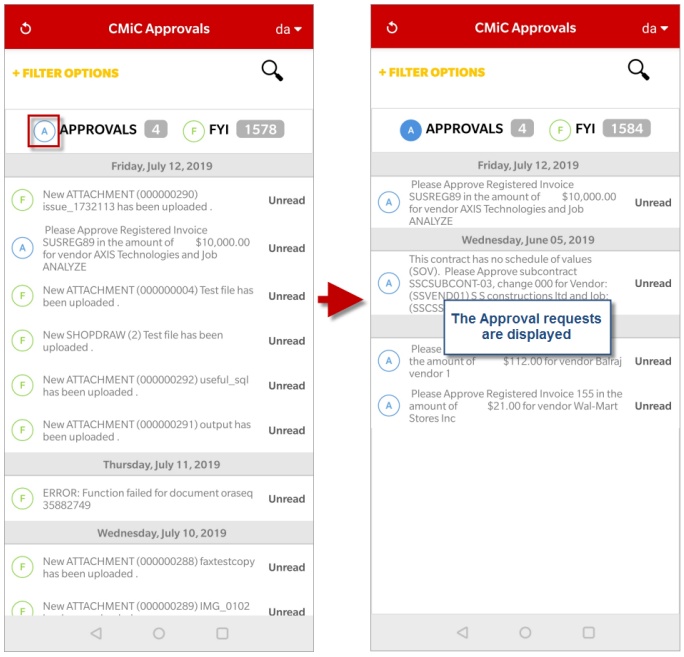
Main Screen

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

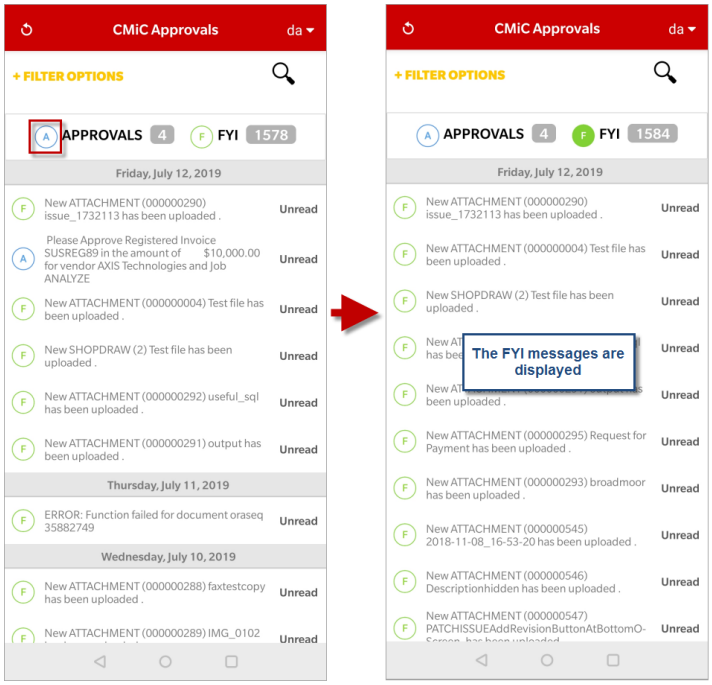
Filter Options

Three filters can be applied to the list:

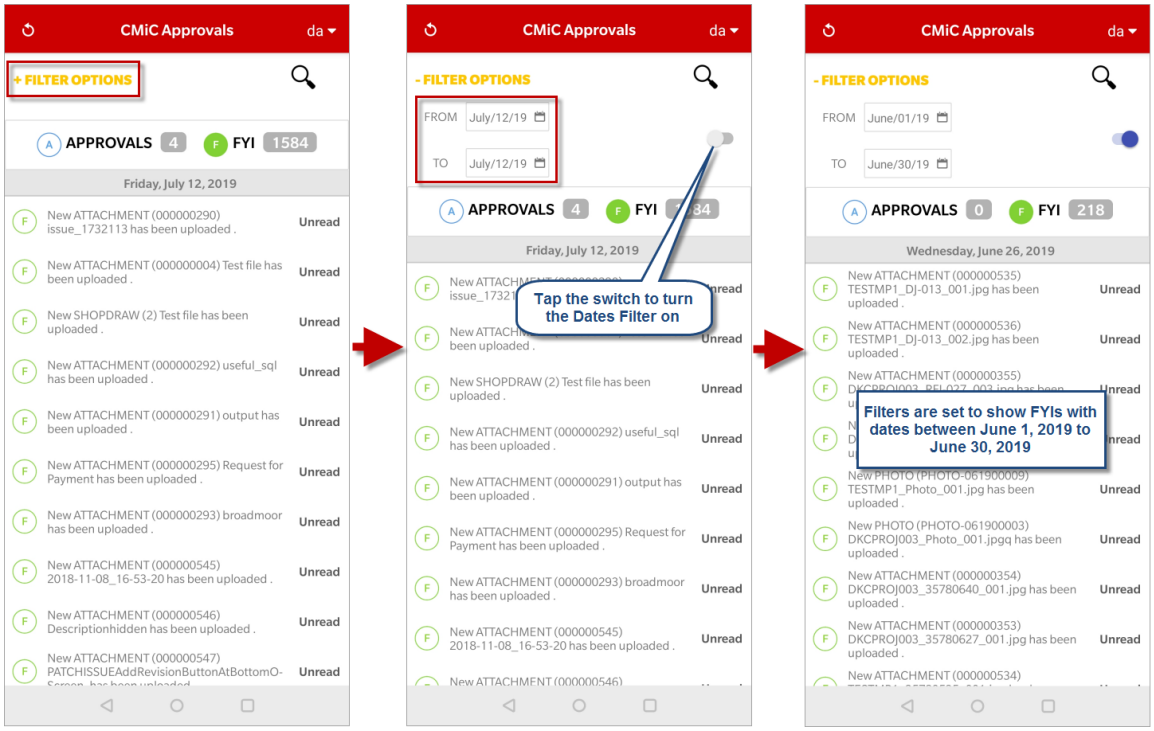
Display Approval Requests



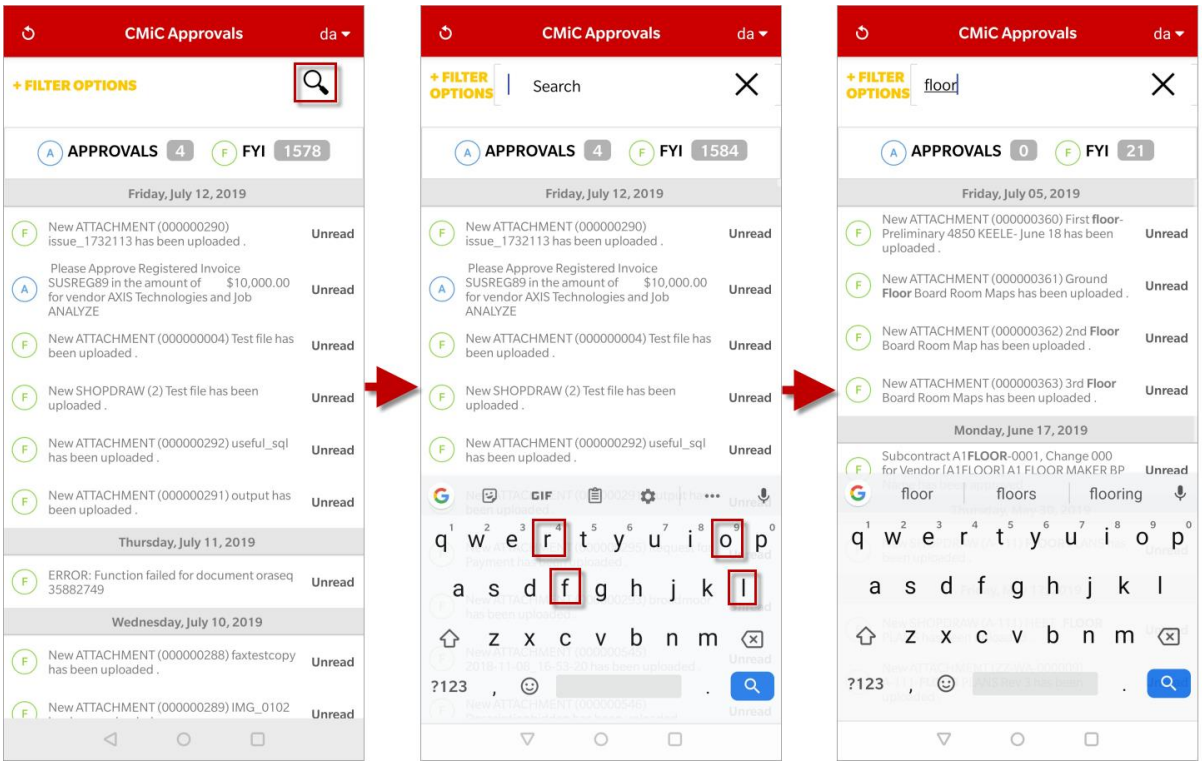
Display FYI Messages



Filter List by Date Range

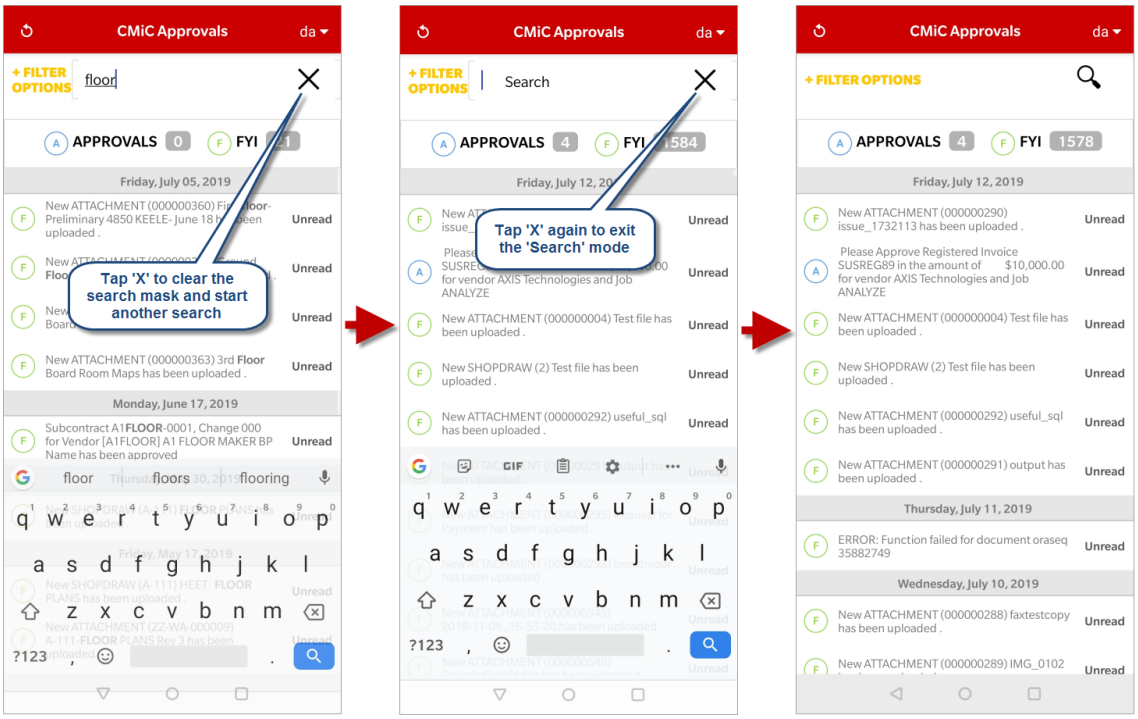


Searches

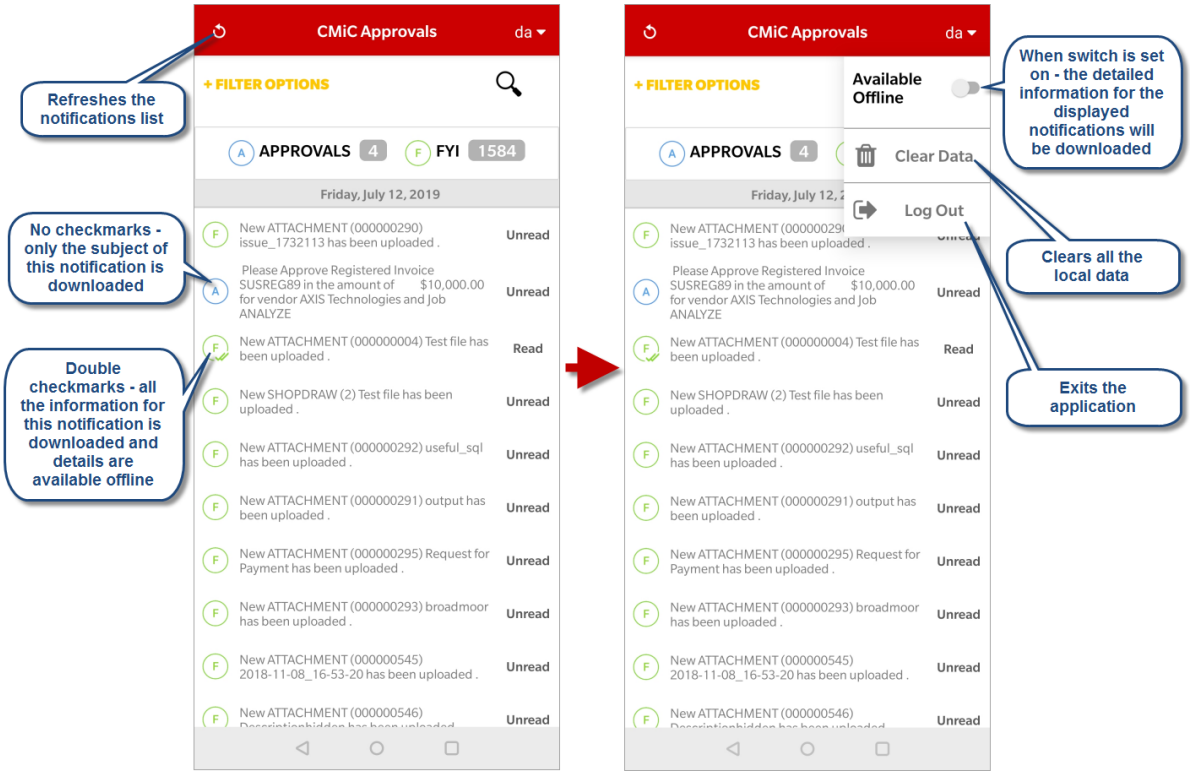


To search for an item, tap the Magnifying Glass icon and enter the search text. Matched records will be displayed while typing.

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



Refresh, Drop-Down Menu & Indicators



Refresh

Updates the notification list from the server.

Drop-Down Menu

Available Offline

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

No checkmarks – only subject of the notification is downloaded.

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

Clear Data

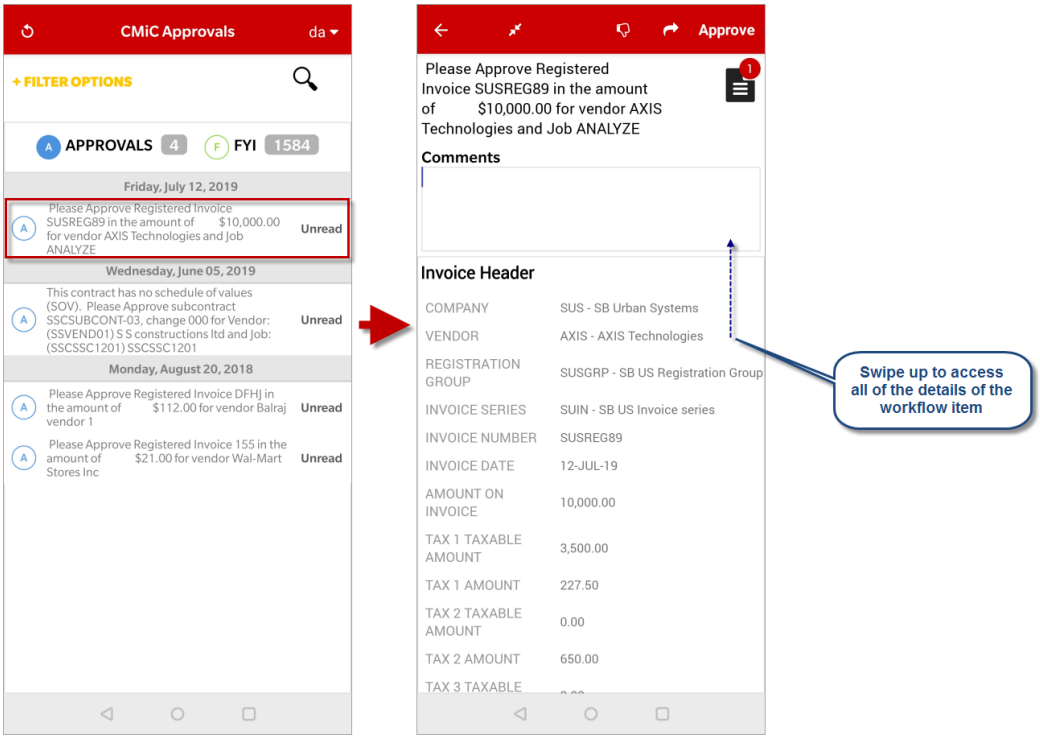
Deletes all of the local data for this user. Tap the Refresh icon to load the notification list.

Log Out

Exits the application.

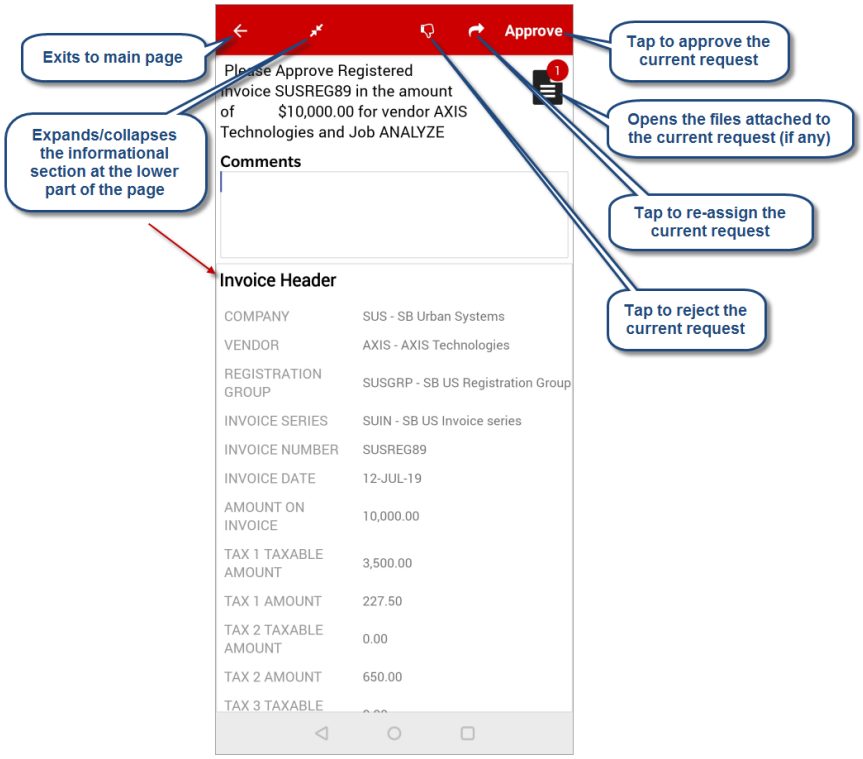
Working with Notifications

Approvals



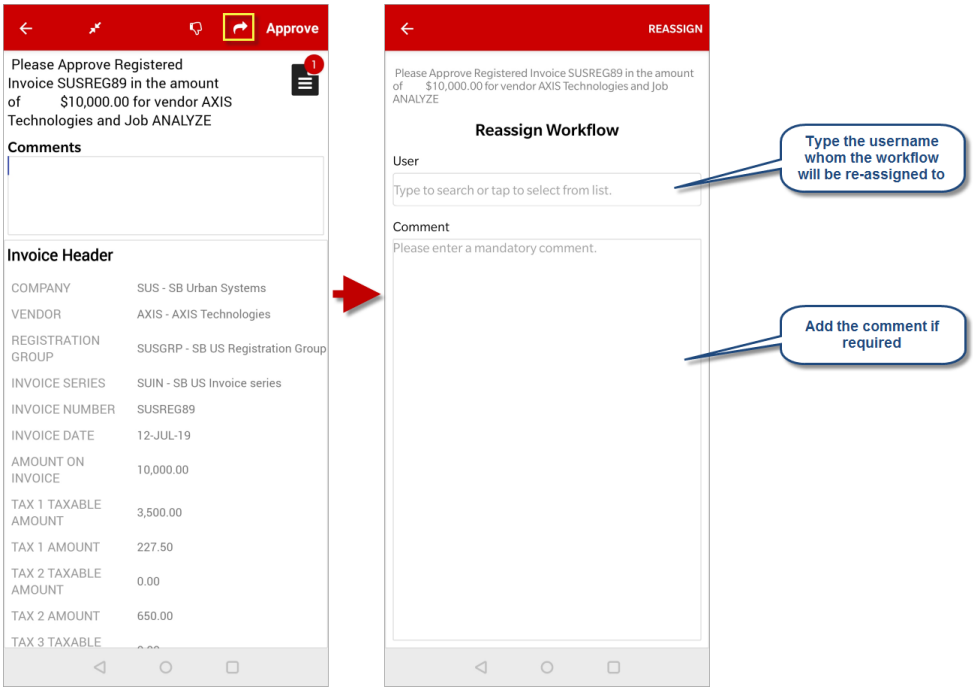
Tap a request to access the details screen, which consists of three sections: a section of controls (along top of the screen), a section for the message, comments, and an icon to access the files attached to the workflow, and the workflow information in the lower part of the screen.

Working with Notifications

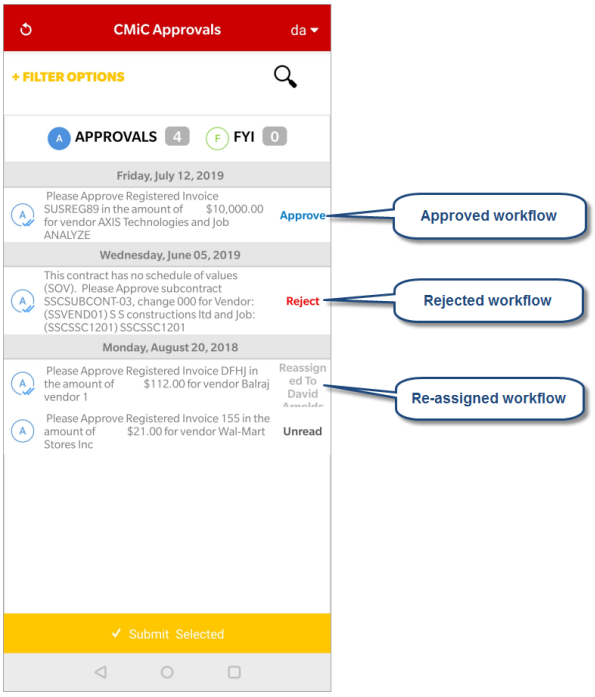


Depending on the settings in the Imaging Controls or Workflow Notifications and Display options, a comment may need to be entered when approving or rejecting the workflow.

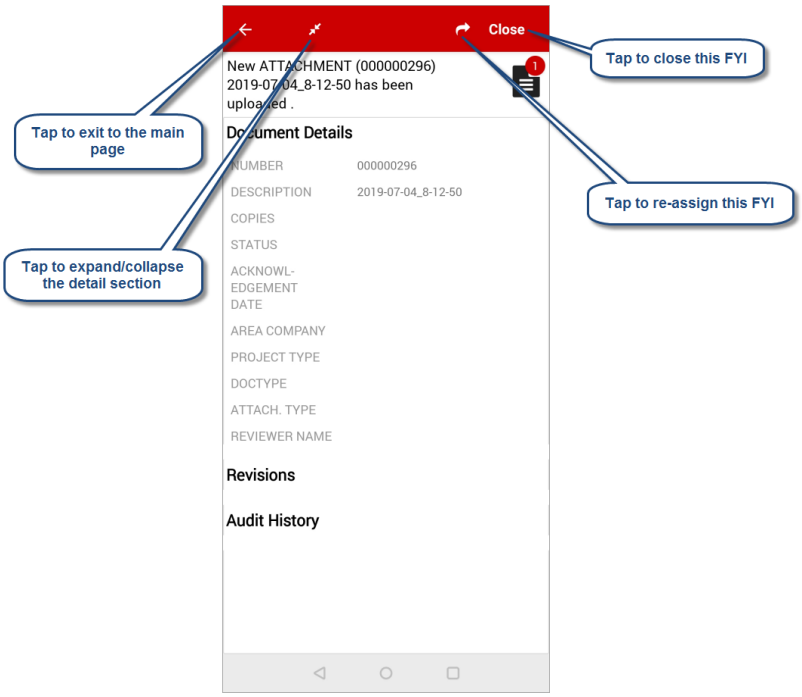
Upon tapping the Re-Assign icon, shown below, the application opens the screen where the workflow can be re-assigned to another user:



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

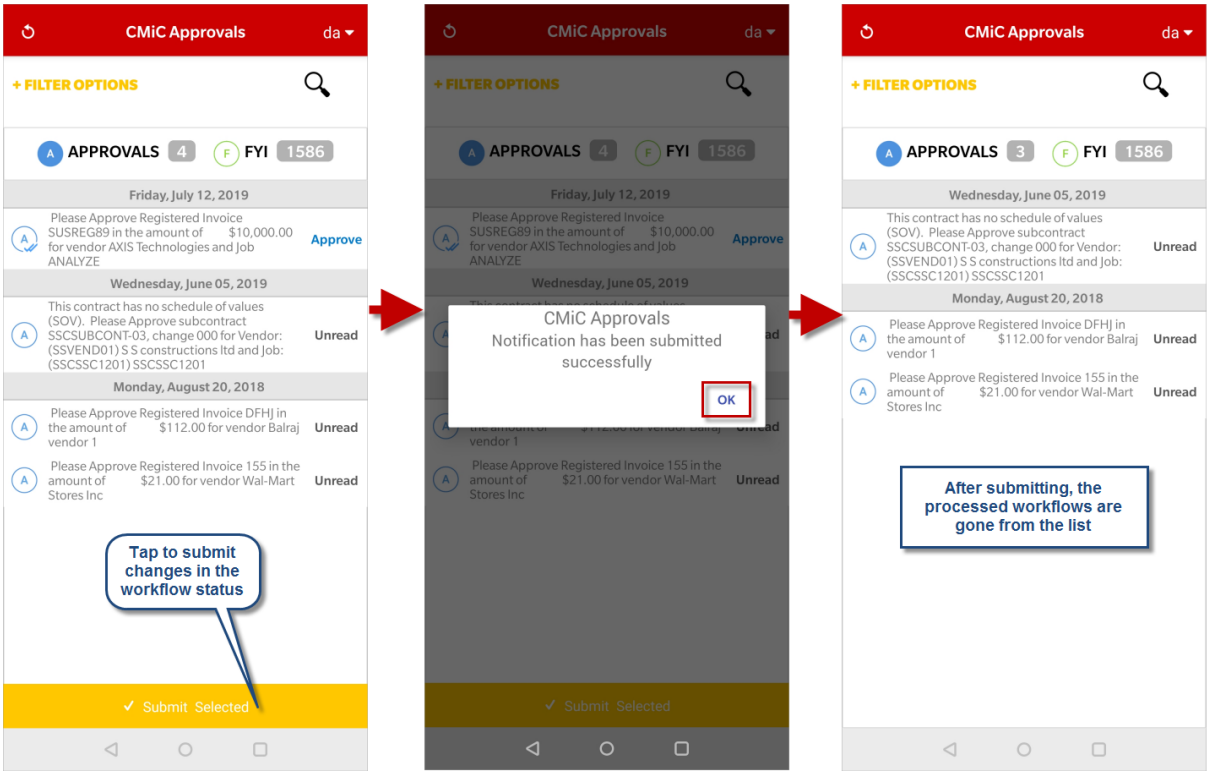


FYI Messages



The controls available on the FYI details screen are similar to the ones for approvals, except there is no [**Approve**] button or Reject icon. The only difference is the [**Close**] button, which is used to close the screen.

Submitting Changes



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

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

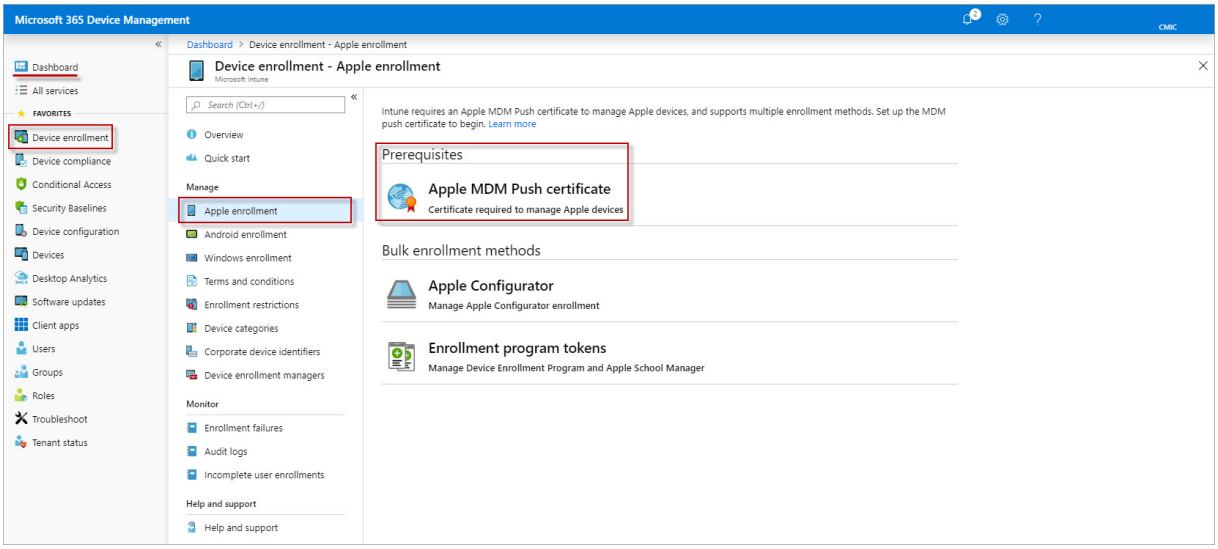
MDM Setup for Mobile Field via MS Intune – Quick Guide

Overview – MDM Setup for Mobile Field via MS Intune

CMiC has added support for mobile device management (MDM) products to control the settings of Mobile Field applications. Our mobile applications now subscribe to the AppConfig.org standards for Mobile App Configuration policies.

This document will walk through the setup and enrollment process using Microsoft Intune, however, this enhancement to CMiC Mobile field has been designed to also support other MDM products that follow the AppConfig.org standards.

Prerequisite



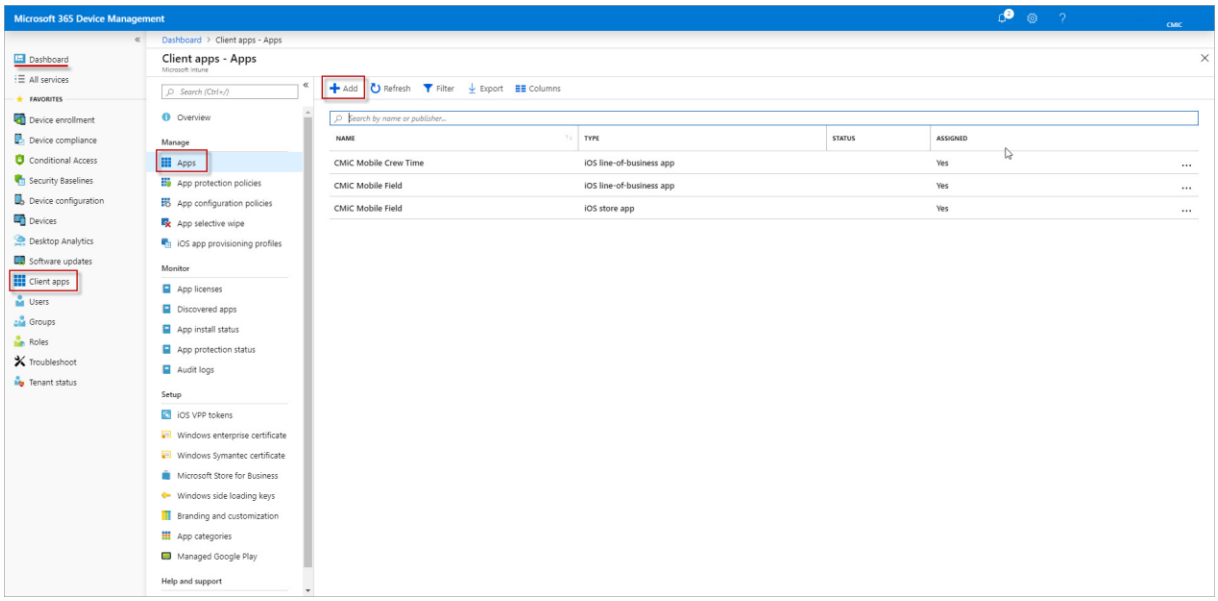
An Apple MDM Push certificate is required for Microsoft Intune to manage iOS and other devices.

To set up an MDM Push certificate, select Device enrollment > Apple enrollment > Apple MDM Push certificate and follow the steps in Microsoft Intune.

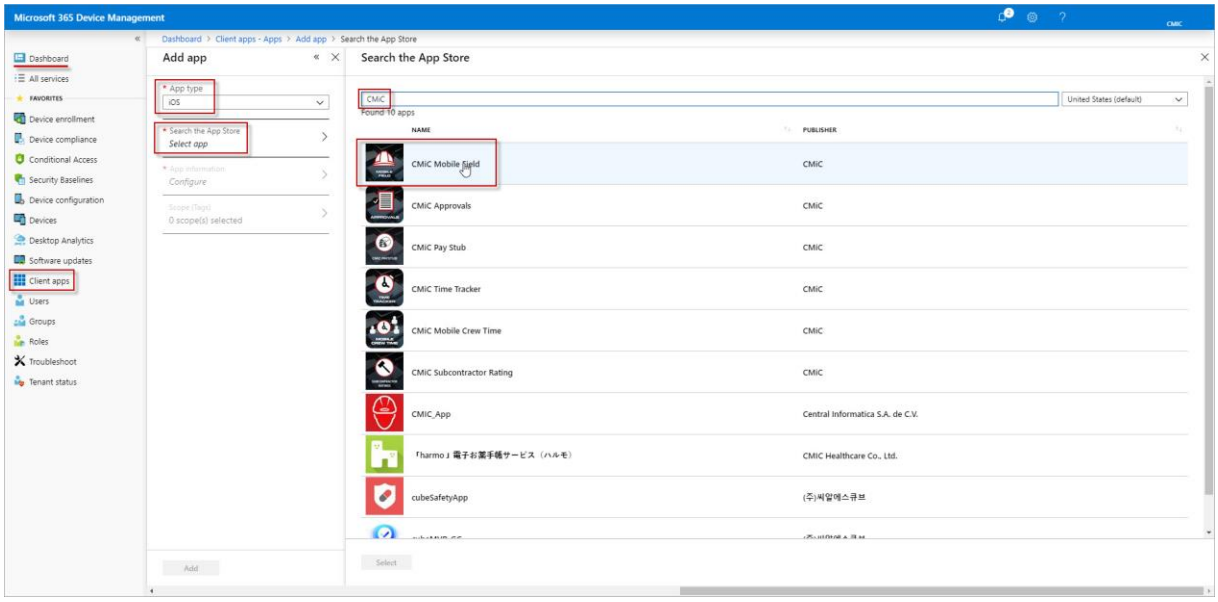
NOTE: The Apple MDM push certificate is valid for one year and must be renewed annually.

Step 1: **Add Mobile Field to Microsoft Intune**

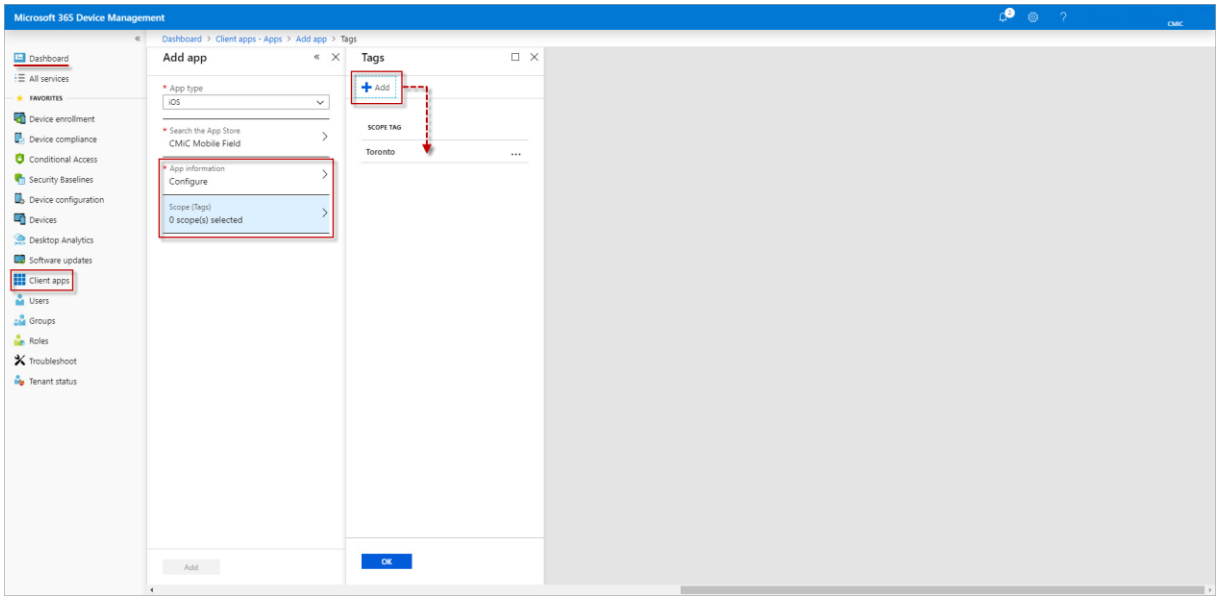
1. Log into Microsoft Intune. Select Client apps > Apps > [**Add**] button to add an app.



2. Select “iOS” in the App type field and then “Select app” in the Search the App Store field. Next, search for “CMiC” in the search field and select “CMiC Mobile Field” to add the Mobile Field iOS app.



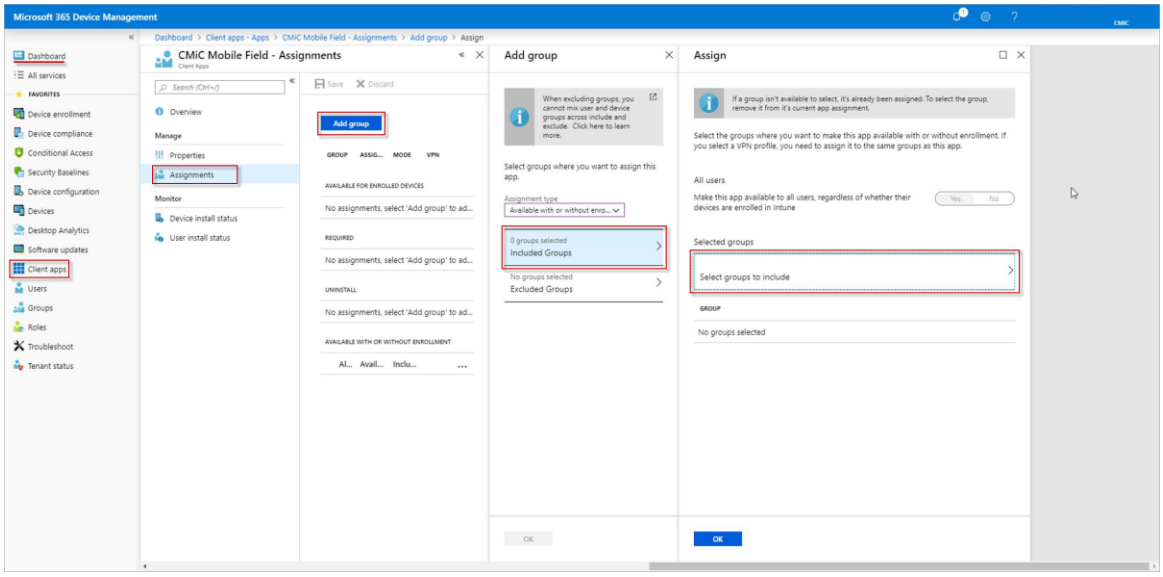
3. Add the app's tag information by selecting "Configure" and then clicking on the [**Add**] button.



4. When finished, click [**OK**].

Step 2: **Assign Mobile Field to All Users or a Group of Users**

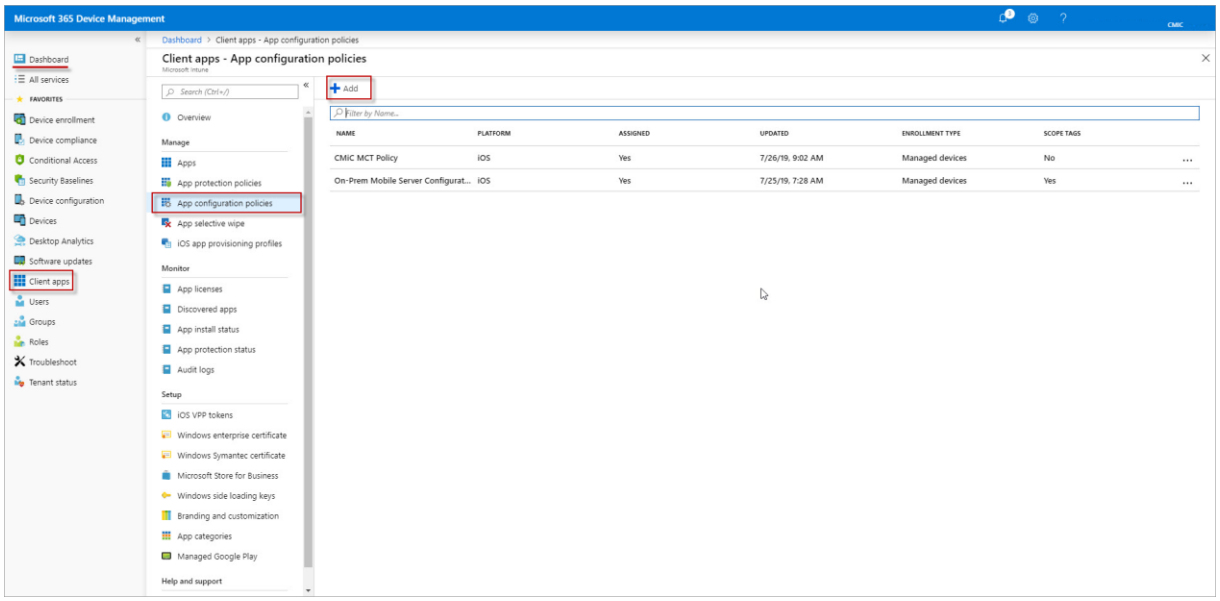
1. Click on Client apps > Assignments > [**Add group**] button to select groups where this app can be assigned. Next, assign the app to all users or selected groups of users.



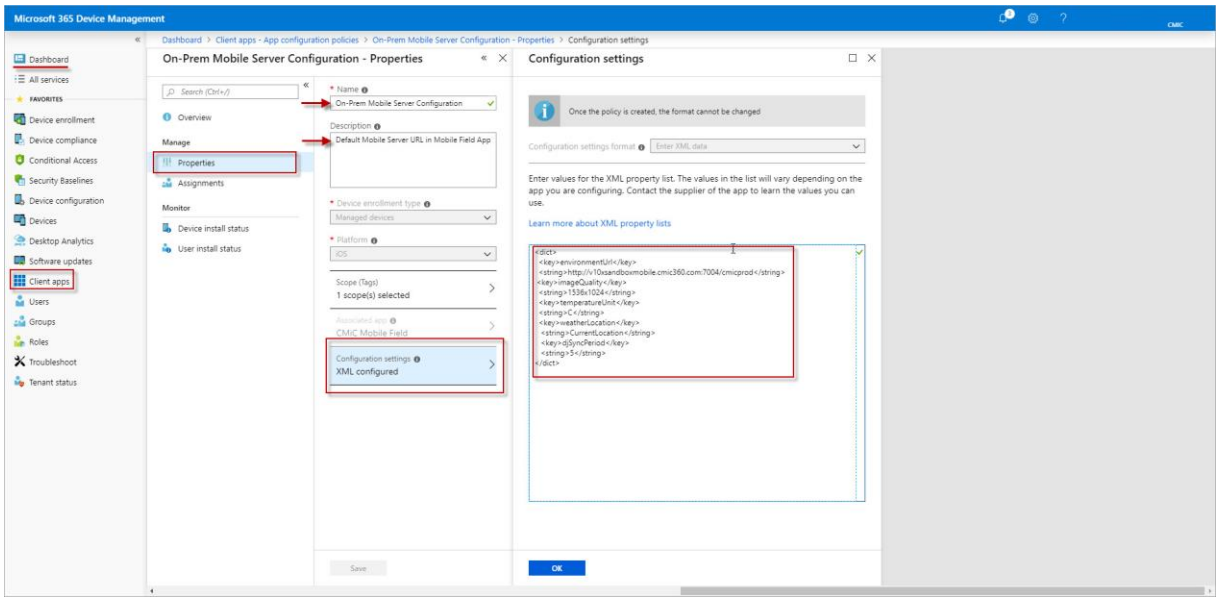
2. When finished, click on [**OK**].

Step 3: **Create App Configuration Policy and Apply it to Mobile Field**

1. Click on Client apps > App configuration policies > [**Add**] button to add an app configuration policy to Microsoft Intune.



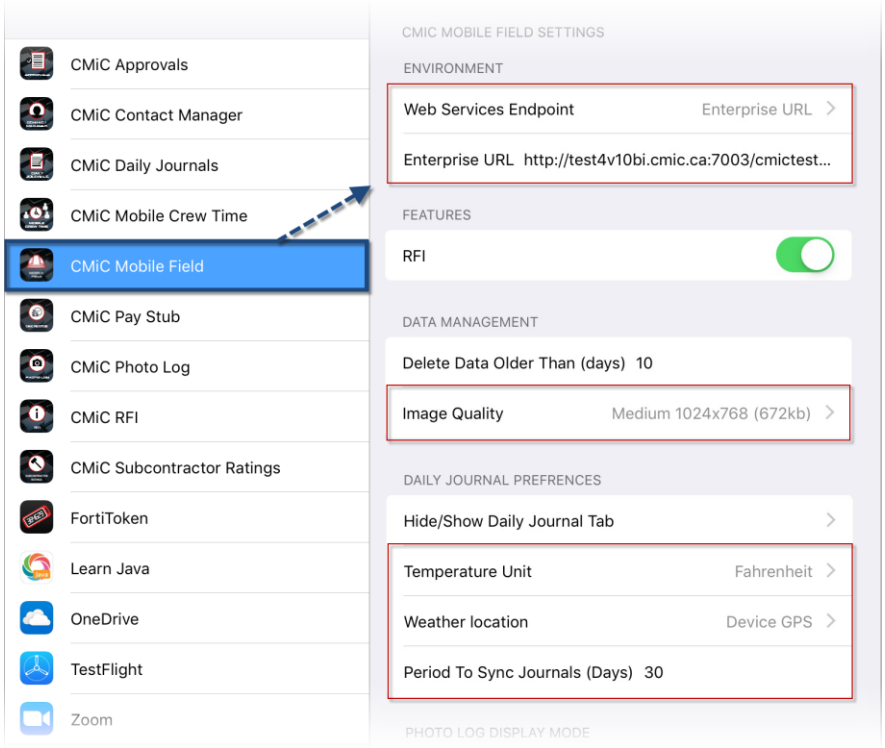
2. Specify a name and description for the new policy under Properties. Under Configuration Settings, select "XML configured" and enter the XML to set the defaults for Mobile Field's iPad settings.



Copy and paste the following XML into the textbox framed in the screenshot above, and replace "***Mobile_Server_URL***" with your mobile server's URL:

```
<dict>
<key>publicCloud</key>
<false />
<key>environmentUrl</key>
<string>Mobile_Server_URL</string>
<key>imageQuality</key>
<string>1536x1024</string>
<key>temperatureUnit</key>
<string>C</string>
<key>weatherLocation</key>
<string>CurrentLocation</string>
<key>djSyncPeriod</key>
<string>5</string>
</dict>
```

Tags have been added to set up the Public Cloud and Enterprise URL iPad settings, shown below, for Mobile Field:



For the Public Cloud setting, the XML should read **<true />** to turn it on, or **<false />** to turn it off.

To specify the Enterprise URL, replace the "***MOBILE_SERVER_URL***" text with your company's mobile server's URL.

3. When finished, click on [**OK**]. Now when your users visit their Microsoft Intune company portal (on their iPad), they can download Mobile Field with the new policy you created, which will populate the Enterprise URL with your company's mobile server.

Symptom – Mobile Webserver URL Not Sticking

If you are experiencing an issue where the Mobile Webserver URL is not sticking (reverts to previous cached setting), go into MS Intune, remove the Policy, then recreate it with the desired Mobile Webserver URL to flush out the caching issue.

Also added the following columns to the Contact LOV:

- Abbrev
- Company Code
- Company Name
- Type