**Reference Guide** 

# **CMiC Mobile v10x**

By CMiC



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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**

_		
Арр	License Required	<b>Connects To</b>
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

The following table summarizes the mobile apps licensing information.

Арр	License Required	<b>Connects To</b>
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.



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)		

#### **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 whi	ch weather	location	to use:
------------	------------	----------	---------

Device GPS	Accesses location by using the device GPS and uses that location to determine the weather conditions.		
	<b>NOTE</b> : 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

2:40 PM Thu Aug 1		🗢 33% 💽
≡	Application Log Viewer	Ø
Current Log		
Thu, 1 Aug 2019 06:23:42 -0400		

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><mark>v10xEnvironment</mark></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

CMIC FIELD			
¢ ⊇ ⊞ CMiC Field Menu	Invitation To Bid	COLLAB	1
earch Go	Issue	COLLAB	
	Job Status Queries	COLLAB	7
Communication Management	Link to Issue	COLLAB	<b>V</b>
Document Management	Meeting Minute Item Status	COLLAB	V
E C Subcontractor Prequalification	Meeting Minutes	COLLAB	<b>V</b>
Bid Management	Miscellaneous	COLLAB	<b>V</b>
Budget & Cost Management     Site Management	My Actions	COLLAB	<b>V</b>
P Reports	Notice	COLLAB	v V
User-Defined Logs		COLLAB	v
George Content Co	Notice Status Maintenance		
Partners	OATS TEST	COLLAB	<b>V</b>
- Contacts	Owner Change Order	COLLAB	<b>V</b>
Convert/Merge Partners and Contacts	Owner Change Transmittal	COLLAB	<b>V</b>
User Maintenance     Change User LDAP Server	PCI Markup Rules	COLLAB	V
Role Maintenance	PCI Projection	COLLAB	<b>V</b>
User Access	PM Document Package	COLLAB	1
Project Roles	PM History	COLLAB	<b>V</b>
Subcontractor Reviews	PM Menu ? Project Selection	COLLAB	<b>V</b>
	Payment Requisition	COLLAB	<b>V</b>
	Plan well Folder	COLLAB	<b>V</b>
	Potential Change Item	COLLAB	V
	Project Administration	COLLAB	<b>V</b>
	Project Contact Popup	COLLAB	<b>V</b>
	Project Control	COLLAB	<b>V</b>
		COLLAB	v V
	Project Execution		
	Project Menu Maintenance	COLLAB	
	Project Partner Maintenance	COLLAB	V
	Project Roles	COLLAB	<b>V</b>
	Project System Options	COLLAB	V
	Punch List	COLLAB	<b>V</b>
	Punch List Item Description	COLLAB	1
	Punch List Status	COLLAB	<b>V</b>
	RFI	COLLAB	V
	RFQ Status	COLLAB	7

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

CMiC Field Menu	Add/Remove menu items from the EVERYTHING Role
ch Go	Select All U
Project: Freshmart Office Building - Chicag	Menu Item Granted
Communication Management	Communication Management
Document Management	Project Calendar
Subcontractor Prequalification	My Actions
Bid Management Budget & Cost Management	Outlook Import/Export
Site Management	Project Partner Directory
Reports	Project Contact Directory
Diser-Defined Logs	Distribution Lists
File Maintenance	
C Security	Meeting Minutes
Contacts	Transmittals
Convert/Merge Partners and Contacts	Transmittals Queue
User Maintenance	Communications
Change User LDAP Server	RF/s 🗸
Role Maintenance     Viser Access	issues 💟
Project Roles	Document Management
License Pools	
Subcontractor Reviews	Submittals
	Collaborator Submittals

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.

PM Roles					Add PM Role	Save Cance	• 🖓 🖬 🕯		
E 🗄 CMiC Field Menu			Project Roles						
sarch Go	Role		Description	Admin Req.	Key Player	Order Seq.	Eval Weight 🔺		
🖯 🗁 Project: Freshmart Office Building - Chica	MADCOLLAB	Madcollaborator							
Communication Management     Document Management	MADPM	MadPM							
Subcontractor Prequalification     Bid Management	MDRDOCROLE	MDR's Doc Role	Selected project role						
🗄 🦲 Budget & Cost Management	MISCELLAN	Miscellaneous							
Generation Site Management     Generation     Generation     Generation	MNGR	Project Manager (MNGR - FL)	•						
User-Defined Logs     Defined Logs     Defined Logs	MRPMROLETE	MR PM ROLE TEST							
🖻 🦳 Security	NAVCOL	navcollab		V					
- Dartners - Dontacts	NAVMGR	Nav PM role		V			-		
Convert/Merge Partners and Contacts User Maintenance		Update Role MIKCR							
Chango User LAAP Server Rook Internance User Access Project Rais Come Pools Subcontractor Reviews	View/Create/Update/Delete All Objects Restricted View All for RFIs	View/Create/Up	date/Delete All Document Types	gboard Objects	fault Email Notific	ation Settings.			
	Sendificecive         Genexice Owner Change Order           Ø Reckive Owner Change Order         Send Partner Transmittal           Ø Send Partner Transmittal         Send Partner Punch List           Ø Send Partner Punch List         Posting - Volding           Ø Send Partner Punch List         Send Partner Punch List           Ø Send Partner Punch List         Posting - Volding           Ø Send Partner Punch List         Send Partner Punch List		View All Mobile Objects - Mozilla Firetov     Other All Mobile Objects - Mozilla Firetov     Update Role HINC     Description     Change Rem     Check List     Constants Overy     Daily Report	10x/Pn ···· ♥ ☆ ≡ iR // *** *** **************************					
	Post Subcontract     Void Subcontract     Add SOV On Posted Subcontract     Workflow     Workflow Button - OCO     Workflow Button - Subcontract		Document Drawing Management Home Workflow Button - PCI	V V Save Close	-				

## 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)

CMIC FIELD	Ass	ign Menu Items - Screen	D∕ II û
CHC Field Henu CHC CHC Field Henu CHC CHC Field Henu CHC CHC Field Henue CHC CHC Field Henue CHC CHC Hangement CHC Hange Hangement CHC	not required	File Maintenance     Local Tables     Local Tables     Local Tables     Local Tables     Moeting Topics     Global Meeting Tackits     Moeting Minutes Ene Status     Submittal Tackas     Submittal Tackas     Submittal Tackas     Panch Lait Laite Topicsoption     Priori Satus     Submittal Tackas     Submittal Tackas	

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 <u>How Springboard Security Works</u> 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

🗢 33% 🔳
Ø

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 <u>App's Settings – iPad</u> 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

:50 PM Fri Aug	12		obile Field	중 32% ■ STEVE ▼
		Westin Savannah	Touch and hold this area to get app info	August 2, 2019
MY ACTIONS			RECENT PROJECTS	
_	1	53 overdue	Westin Savannah Harbor (183100)	÷
	-	App inf	0	
Connected to		Https://v10xsandboxm	obile.cmicglobal.com/cmicprod	
	Version	2.6.1		
DUE	Build	76573		
	W 8	the second second second	TASKS	

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 Home 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 <u>Recent Projects</u> 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**

MY ACTIONS		
-	53 overdue	
	DUE IN 7 DAYS	
DUE TODAY	O DUE IN 14 DAYS	

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.

1:54 PM Fri Aug 2			<b>?</b> 32% 🔳	
	С	Action Items du	ie next 7 days 🔉 🔪	tap to close
Home	Westin Savar	Block Structure Cha	Due on 2019-08-05 nge	this section
Contacts				
	MY ACTIONS			
RFIs	53 OVERDUE	-		
Issues				
A Drawings				
Submittals	Savannah <sub>savannah River</sub>			
PCI	Westin Sava MY ACTIONS 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0			

## **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

CMic Mobile Field TERY *     1 New Community Center Way (CM)   September 5, 2019 Projects   MY ACTIONS	:45 AM Thu Sep 5		중 35% ■
MY ACTIONS   Currently loaded project   1 New Community Center Way (CM) (1503) CMIC Construction Inc. (10)   1 ULV Facilities Upgrade (13530)   100 Ave Road Re Surface (16750)   2015 Pan Am Games - North York Field (PAN8005)   Map   Sate   Christie   Projects   A Perfect Place (70-003)   Christie	=	CMiC Mobile Field	TERRY <b>*</b>
MY ACTIONS			September 5, 2019
Currently   I New Community Center Way (CM) (1503)   CMic Construction Inc. (10)   1 ULV Facilities Upgrade (13530)   1 ULV Facilities Upgrade (13530)   100 Ave Road Re Surface (16750)   DUE TODAY   2015 Pan Am Games - North York Field (PAN8005)   4560 Office Tower (15690)   Nap   Sate   New Community Center Way (CM) (1503)   Christie   Pite Park   A Perfect Place (70-003)   K   PARKOALE		Projects	
I ULV Facilities Upgrade (13530)         I ULV Facilities Upgrade (13530)         100 Ave Road Re Surface (16750)         DUE TODAY         2015 Pan Am Games - North York Field (PAN8005)         Map         Sate         N         Christie         Pits Park         A Perfect Place (70-003)         K         PAREDALE	MY ACTIONS	Q Search	Projects
Ioaded project   I ULV Facilities Upgrade (13530)   100 Ave Road Re Surface (16750)   DUE TODAY   2015 Pan Am Games - North York Field (PAN8005)   4560 Office Tower (15690)   Map   Sate   N   Pits Park   A Perfect Place (70-003)   K   PARKDALE	Currently	New Community Center Way (CM) (1503) CMiC Construction Inc. (10)	3)
DUE TODAY       2015 Pan Am Games - North York Field (PAN8005)         Map       Satel         N       Christie         Pits Park       80 Bay Office Renno (151001)         A Perfect Place (70-003)         Tk         ParkDale	loaded project	ULV Facilities Upgrade (13530)	
Map       Satel         A560 Office Tower (15690)         80 Bay Office Renno (151001)         RNDALE         Christie Pits Park         A Perfect Place (70-003)         Three Error	U	00 Ave Road Re Surface (16750)	
Map     Sate       N     Christie Pits Park       A Perfect Place (70-003)       K     Cancel	DUE TODAY 2	2015 Pan Am Games - North York Field (PAN8005)	
N     Christie       Pits Park     80 Bay Office Renno (151001)       A Perfect Place (70-003)       rk       ParkDale       Three Strop		1560 Office Tower (15690)	
rk PARKDALE Cancel	N Christie	30 Bay Office Renno (151001)	
State		A Perfect Place (70-003)	
	PARKDALE	Cancel	
	Budweiser Stage 📀	E	
Google Map data @2019 Google Terms of Use	Coogle	Map data @2019 Google Terms of Use	

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:

8:28 AM Thu Sep 5		🗢 41% 💽 ·
	CMiC Mobile Field	TERRY 🔻
Please wait as the app downloads your enterprise data		
Creating the local database		✓
Downloading User Information		✓
Downloading User Contacts		✓
Downloading Project Partners		
Downloading Document Types		
The initialization process is complete		

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

## **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 <u>*RFIs* – Screen</u> 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 <u>Create New Journal</u> 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 <u>Submittals – Screen</u> section for details.

## **Create a New RFI**

An RFI can be quickly created by tapping this option.

Please refer to the <u>*RFIs* – Screen</u> 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 Contacts 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**

8:25 AM	Tue Aug 6		🗢 24% 💽
≡		Mobile Field nah Harbor (183100)	STEVE <b>T</b>
	Crea	ate Contact	tact
Q SE	Ø		
AF	FIRST NAME (REQUIRED)	LAST NAME	
AS			
	MOBILE PHONE NO.	WORK PHONE NO.	
AN	EMAIL	PROJECT PARTNER (REQUIRED)	
	ADDRESS	NOTES	<b>1</b> +
AE			
A.			VISL C
BE	Close		Save
	٨	/ 🗹	

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.

Project Partners				
Q. Search				
Company	Business Partner			
Partner Nam	e	Partner Code		
CMiC Cons	struction Inc	10		
CMiC Test	Company Inc.	ZZ		
		Cancel		

Project P	artners
Q Search	
Company Business Partner	
Partner Name	Partner Code
Ace Supply Co. Inc.	1159
AK Air Conditioning Inc.	10-003
All American Tile Inc.	18020
Brisbon Brook Beynon Architects	BBBARCH
Eppstone Unger and Harwood Architects	EPPUH01
Canc	el

Sample of Business Partner tab selected.

Sample of Company 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 **Save**] when finished.

## **Edit Contact**

To edit a contact, select the contact and tap the Edit icon *s* 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  $\square$ , 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:

<ul> <li>CMiC Mobile Field</li> </ul>	8:27 AM Tue Aug 6			奈 24% ∎
Kailboxes	Ink Cancel on s	New Message	Send	
Test CMIC	Delete Draft		$(\div)$	2018-11-16 <b>O</b>
read	Save Draft			Details
App Store Co App Store Co Dear Developer	onnec			ds:
issues with a re TestFlight	Sent from my iPad		<u>l.</u>	com>
CMiC Mobile	e Cre			

## Assign Contacts to Project

Assign Contacts				
Q Search	Q. Search			
Internal	External			
Ν	lame	Company		
0	6 MOBILE	CMiC Construction Inc		
0	7 Mobile	CMiC Construction Inc		
0	8 Mobile	CMiC Construction Inc		
0	9 Mobile	CMiC Construction Inc		
Cance	Cancel			

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

17 AM Tue Aug 6		<b>Mobile Field</b> Iah Harbor (183100)		STEVE STEVE
		RFIs		Create RFI
Q Search	RFI-0034 - Confiri	n spacing in room 304		
RFI-0035 Fixture in incorrect location Steve Cangiano 2019-07-	Date Created 2019-07-22	Due Required 2019-07-25	Status Pending	
RFI-0034	From: Steve Cangiano	Co-Author:		
Confirm spacing in room 304 Steve Cangiano 2019-07-	To: Jason Brooks	CC:		
RFI-0033 What sould we do about this sec: Steve Cangiano 2019-07-				
<b>RFI-0032</b> Confirm Height of Wall	SUGGESTION			
Steve Cangiano 2019-06-	14 ANSWER			
RFI-0031 Lockers placement Aaron Levitt 2019-06-	COST IMPACT - N			
B	SCHEDULE IMPACT	N 💌 🔒		

Tap the RFI menu icon to display the RFIs screen, which is used to create, view, and respond to RFIs onsite. 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.

9:09 AM Tue	e Aug 6					<b>?</b> 23% 💽
				<b>obile Field</b> h Harbor (183100)		STEVE 🔻
			F	FIs		Create RFI
Q Sea	arch	1) T 📊	RFI-0034 - Confirm	spacing in room 304		
Folder Ch	noice RFI Log		Created	Due Required	Status	
Status	Received		*-22	2019-07-25	Pending	
Sorted E	Drafts		angiano	Co-Author:		
Has Atta	Sent			CC:		
Steve	RFI Log		rooks			
DELO			UESTION			
RFI-00	033	Ø				

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

### **RFI Actions**

	RFI Actions					
•	Respond					
╘	Redirect					
	Edit					
*	Forward					
	Send I/O email					
0	Email report					
Actions A	vailable in Edit Mode					
Ø	Attach photo saved on device					
Ō	Capture photo & attach to RFI					

The following table shows the action performed by each icon:

#### **Search & Filter RFIs**

Q Search	7	Filter
Folder Choice	RFI Log	
Status	All	
Sorted By	RFI Number D 🔻	
Has Attachments	$\bigcirc$	

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 **T** 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  $\checkmark$  indicates which statuses are selected, as shown below:

Q Sea		<b>RFI-0038</b> - F
Folder Ch		Date Created 2019-07-30
Status	3 Items	
Sorted E	All	- angian
Has Atta	Accepted	
	Approved	angian
RFI-0 Confiri	Closed	ИС
Steve	Open	- TION
RFI-0	Pending	~
Steve	Rejected	3
RFI-0	Returned	
Fixture Steve	Cancelled	IPACT
	Under Further Review	ILE IM
	closed	L

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**

	<b>bbile Field</b> h Harbor (183100)		≈ 20%  STEVE ▼
		Save	Submit
	CO-AUTHOR		
S 1+			<b>L</b> +
	CO-AUTHOR RFI NO		
± ی			
			•
	DATE REQUIRED		
Ë	Aug 9, 2019		Ë
	Westin Savannal Create I	Westin Savannah Harbor (183100)   Create RFI Local     CO-AUTHOR     CO-AUTHOR RFI NO     CO-AUTHOR RFI NO     DATE REQUIRED	Westin Savannah Harbor (183100)   Create RFI Local   CO-AUTHOR   CO-AUTHOR RFI NO     CO-AUTHOR RFI NO     DATE REQUIRED

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

Confirm doorway opening not cleaSteve Cangiano2019-07-23	Notes
RFI-0035 Fixture in incorrect location Steve Cangiano 2019-07-22	There are no records to display           Add a note
^	

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  $\geq$ .

### **Respond to RFI**

10:10 AM Tue Aug 6			🗢 20% 💽
=	CMiC Mobile Fiel Westin Savannah Harbor		STEVE 🔻
Cancel	RESPONSE TO RFI R		Submit
RFI-0039 - BLOCK STRU	CTURE CHANGE		
Date Created 2019-07-31	Date Required 2019-08-05	Status SUBMITTED	
From:	To: Steve C	Cangiano	
CC:			
QUESTION			
See attached			
SUGGESTION			
RESPONSE			
ANSWER: OPEN			Accept Suggestion
	0		

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

10:16 AM Tue Aug 6	<b>CMiC Mobile Field</b> Westin Savannah Harbor (183100)	হ 20% 🕞
Cancel	Send I/O Email	Send
EMAIL INFORMATION		
FROM:		
TO:	Steve Cangiano	tap to view list of contacts
SUBJECT	Block Structure Cl	hange
ATTACHMENTS:		
CC:	Tap to view	
MESSAGE		
SUBJECT:	Block Structure Cl	hange
DATE REQUIRED:		
COST IMPACT:		
COST AMOUNT:		
QUESTION:	See attached	
SUGGESTION:		
ANSWER:		

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

0:36 AM Tue Aug 6		<b>obile Field</b> h Harbor (183100)	
	ISS	SUES	Create Issue
Q Search T	IS-01246 - Environ Date Created 2019-07-24	ment, Health and Safety Due Date 2019-07-29	Status New
Environment, Health and Safety Steve Cangiano 2019-07-24	From: Steve Cangiano	To: Chet Kuchyt	
IS-01245 Environment, Health and Safety Steve Cangiano 2019-07-22	Responsibility: Chet Kuchyt	CC:	
IS-01244 Environment, Health and Safety Steve Cangiano 2019-07-18	SEVERITY DESCRIPTION	TYPE	d cortified?
IS-01243 Environment, Health and Safety Steve Cangiano 2019-07-18	SUGGESTION	alphent regularly tested an	
IS-01242 Environment, Health and Safety Steve Cangiano 2019-07-17	RESOLUTION		
	Catagon		tion Area

Tap the **Issues** 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**

Q Search	τ.	Filter			
All Per	nding Submitted				
Status	All				
Severity	All				
Туре	All				
Sorted By	Issue Number 🔻				
Has Attachments	$\bigcirc$				
Mine Only	$\bigcirc$				

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  $\Im$  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 \checkmark indicates which items are selected, as shown below:

Q Se	earch	IS-01246 -	Q Se	earch	<b>T</b>	IS-01246
All	Pending Submitted	Date Created 2019-07-24	All	Pending	Submitted	Date Create 2019-07-24
Status	3 Items	From:	Status	3 Iter	ns 🛄	From:
Severity	All	<b>`ang</b> ia	Severity	2 Iter	ns	Steve Cangi
Туре	Closed	<ul> <li>isibility</li> <li>ichyt</li> </ul>	Туре	All		nsibil <b>Jc</b> hyt
Sorted E	In Progress	🖌 тү	Sorted E	High		🖌 ТҮ
Has Atta	New		Has Atta	Immediate		IDTI
	Open	I fire c	Tido Atte	Low		
Mine Or	Work Order		Mine Or	Med		I fire
	nment, Health and Safety Cangiano 2019-07-18	SUGGESTION	Enviro	nment, Health ar	nd Safety	SUGGÉSTIO

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 submittals 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.

I AM Thu Sep 5			<b>iC Mobile Field</b> ity Center Way (	CM) (1503)		중 Not Charging TERR\
Q Search	T		SUBMITTALS			
<b>SSS-001</b> HW-01 CMiC Construction Inc.	Ø	SSS-001 - HV Spec Section 09600	V-01 Spec Sub-	Section Type Sam		atus oproved
SBMTL-0000012 Floor Samples Zone 4 CMiC Construction Inc.			WRNS Architect	s		
SBMTL-0000011 Floor Samples Zone 3	0	CC: Received	Sent	Returned	Forwarded	Schedule
SBMTL-0000010 Flooring samples Monty Holmes Industries	Ø	G1	sc	125 AS	sc	•
SBMTL-0000009 Floor samples Monty Holmes Industries	Ø	Schedule	Preparation	<b>Review</b> May 09, 2019	Approval May 16, 2019	9 Days Floa Forward May 23, 2019
SBMTL-0000008 Flooring Specs 0000100110100	Ø	Progress	Apr 25, 2019	May 03, 2019	May 16, 2019	May 10, 2019

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

5 AM Thu Sep 5		and the second	MiC Mobile Field			
Q Search	) <b>T</b>		SUBMITTALS			
SSS-001	Ø	Schedule				9 Days Float
HW-01		<	Preparation	Review	Approval	Forward
CMiC Construction Inc.		Schedule	Apr 25, 2019	May 09, 2019	May 16, 2019	May 23, 2019
SBMTL-0000012						
Floor Samples Zone 4 CMiC Construction Inc.		Progress	Apr 25, 2019	May 03, 2019	May 16, 2019	May 10, 2019
SBMTL-0000011 Floor Samples Zone 3	Ø	Cycle 1 Actio	ons			
		Action	Due Date	Action Date	Days Diff	Status
SBMTL-0000010	Ũ	Received	May 09, 2019	May 03, 2019	-4	SENT
Flooring samples		Sent	May 16, 2019	May 03, 2019	-9	SENT
Monty Holmes Industries		Returned	May 10, 2019		0	
SBMTL-0000009	01	Forwarded	May 10, 2019		0	
Floor samples	0					
Monty Holmes Industries		Attachment	ts			
SBMTL-0000008 Flooring Specs 00001001101	00				×	
OMIO Operationalism Inc.						

9:37 AM Thu Sep 5			<b>?</b> 41% 🛃
		CMiC Mobile Field 1 New Community Center Way (CM) (1503)	TERRY <b>T</b>
Q Search	T	SUBMITTALS	
<b>SSS-001</b> HW-01 CMiC Construction Inc.	Ø	Attachments	
SBMTL-0000012 Floor Samples Zone 4 CMiC Construction Inc.		Submittal Documen	
SBMTL-0000011 Floor Samples Zone 3	Ø	2019-05-01_8-53-08R	
SBMTL-0000010 Flooring samples Monty Holmes Industries	Ø	Notes	Ð
SBMTL-0000009 Floor samples Monty Holmes Industries	Ø	• Submittal document attached with further details.	
SBMTL-0000008 Flooring Specs 0000100110100	Ø	Add a note	

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.

9:4	10 AM Thu Sep 5	i						🗢 41% 🛃
	≡		1 Ne		obile Field enter Way (CM)	(1503)		TERRY 🔻
(	Q Search		) <b>T</b>		<b>/ITTALS</b>			
,	SSS-001 - I	HW-01						Show More 🔗
	Spec Section 09600	1	Spec Sub-Sect	tion	Type Sample		Status Approved	
	Responsibilit Andrea Smith	y h - WRNS Archite	octs					
	CC:							
	Rece	ived	Sent	Re	turned	Forwarded	I	Schedule
	G	0	sc		125 AS	sc		•
	Schedule							9 Days Float
		Preparation	Review	Approval	Forward	Fabrication	Delivery	Onsite
	Schedule	Apr 25, 2019	May 09, 2019	May 16, 2019	May 23, 2019	May 23, 2019	May 30, 2019	May 31, 2019
					M			

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

			<b>२</b> 43% 🚺
		1503)	TERRY
<b>T</b>	SUBMITTALS		
			Show Less 🔿
Spec Sub-Section	Type Sample	Status Approv	ed
architects			
Days Until Required <b>75</b>	Closed Date	Procur N	ement Item
Days Elapsed - <b>89</b>	Days Overdue		
Sent	Returned	Forwarded	Schedule
sc	AS	sc	•
	T Spec Sub-Section Architects Days Until Required 75 Days Elapsed -89 Sent	Image: Constraint of the section       SUBMITTALS         Spec Sub-Section       Type Sample         spec Sub-Section       Type Sample         wrchitects       Closed Date 75         Days Until Required 75       Days Overdue -89         Sent       Returned         Sect       Returned         Set       Returned	Image: New Community Center Way (CM) (1503)         T       SUBMITTALS         Spec Sub-Section       Type       Status         Approv       Sample       Approv         Inclusion       Days Until Required       Closed Date       Procure         Days Elapsed       Days Overdue       Prowarded       Sent       Returned       Forwarded         Sevent       Returned       Forwarded       Set       Set

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:

=			<b>C Mobile Field</b> ty Center Way (CM)	(1503)		TERRY
Q Search		r s	UBMITTALS			
Status (	All	SSS-001 - HW	-01			
Schedule	All	Spec Section	Spec Sub-Section	on Type Sample		atus proved
Sort By	Submittal Num 🔽	· · · · · · · · · · · · · · · · · · ·				
/ine Only	$\bigcirc$	Responsibility Andrea Smith - V	VRNS Architects			
las Attachments	$\bigcirc$	CC:	Sent	Returned	Forwarded	Schedule
SBMTL-000001 Flooring samples Monty Holmes Inde	8 <del>.</del> .		sc	AS	sc	•
SBMTL-000000	9 🖉	Schedule				9 Days Float
Floor samples Monty Holmes Inde	ustries		Preparation Re	eview	Approval	Forward
monty rionics ind	aotrico	Schedule	Apr 25, 2019 Ma	ay 09, 2019	May 16, 2019	May 23, 2019
SBMTL-000000	1977 (1977) 1977 - 1977					
Flooring Specs 000			Apr 25, 2019 Ma	av 03. 2019	May 16, 2019	May 10, 2019

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

Q Search	T	SUBM	ITTALS			
		Received	Sent	Returned	Forwarded	Schedule
<b>SSS-001</b> IW-01 CMIC Construction Inc.	Ø	G1	sc	<b>AS</b>	SC	•
SBMTL-0000012 Floor Samples Zone 4 CMiC Construction Inc.		AM	MR	MR	MR	•
SBMTL-0000011 Floor Samples Zone 3	Ø	•	MR		MR	•
SBMTL-0000010 Flooring samples Monty Holmes Industries	Ø	MH	MK + 3	659 AS	MR	•
SBMTL-0000009 Floor samples Monty Holmes Industries	Ø	SF	MR	2005 SF	MR	•
SBMTL-0000008	Ø	0				-

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**



Delayed (0 float)

Late (negative float)

### **Contact Bubble Pop-Up Window**

Returned								
Date Required May 10, 2019 Days Late -		Actual Date - Remaining Float <b>9 Days</b>						
Contact Information	ation							
AS	Andrea Smith WRNS Architects							
			Send IO					
		ОК						

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:

	Sent		
MR	Marcel Richard CMiC Construction Inc.		Send IO
			Send IO
Date Required	Actu	ial Date	
Nov 20, 2017 Days Late	- Rem	aining Float	
-	0 Da		
Contact Inform	ation		
SC	Steve Cangiano CMiC Construction Inc.		
			Send IO
	ОК		

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

8:25 AM Fri Sep 6	CMiC Mobile Field	🗢 70% 🔳
	1 New Community Center Way (CM) (1503)	
Cancel	Send I/O Email	Send
EMAIL INFORMATION		
FROM:		
TO:	Andrea Smith	1.
SUBJECT	Flooring samples	
ATTACHMENTS:	•	
	Submittal Documents	
	carpet	
	•	
CC:		
MESSAGE		
SUBJECT:	Flooring samples	

# PCI – Screen

:12 PM Tue Aug 6					<b>रू</b> 18% 🛙
≡			<b>Mobile Field</b> nnah Harbor (183100)	6	STEVE
Q Search	<b>T</b>	Potenti	al Change Items		+ Create PCI
EXT0000005 Tag form 2019-07-22 Pending	Ø	EXT0000005 - Created 22/07/19	Tag form Posted	Type External Change	Status <b>Pending</b>
EXT0000004 Change Flooring 2019-04-08 Pending	Ø	Scope Descriptio	on and Details		
EXT0000003 Design Change 2019-02-17 Pending	Ø	Request for Quot	tation Vendor	Received	Comment
EXT0000002 Change in Flooring Type 2018-12-15 Pending	Ø	Review and Appr	10 oval		
EXT0000001 Flooring Type Change 2018-11-10 Pending	Ø	There are no records h			
		Date	Ilser Actio	n Description	

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:

:13 PM Tue Aug 6					
=		CMiC Mobile Westin Savannah Ha			STEVE •
Q Search	<b>T</b>	Potential Chan	ge Items		+ Create PCI
EXT0000005 - Tag	form				Show More 💙
Created 22/07/19	Posted	Typ Ext	ernal Change	Status Pending	
Scope Description an	nd Details				
Request for Quotatio	n				
Description	Vendor	Contact Amount	Sent Due	Received	Comment
	10	STEVE	0		
Review and Approval					
There are no records here to	review				
History					
History					
		/	€		

Tap the Show More 🙁 control to show additional fields:

		MiC Mobile Field avannah Harbor (183100)		STEVE
Q Search	T Pote	ential Change Items	+	Create PCI
EXT0000005 - Tag for	m		Sł	now Less 🔿
Created 22/07/19	Posted	Type External Change	Status Pending	
OCO Number	Days Impact	Start Date	End Date	
Source	Due Date	Reason		
Proposal Issued	Proposal Signed	Change Sent	Change Signed	
Estimate Description	Estimated Amount			
Scope Description and De	etails			

### 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:

1:14 PM Tue Aug 6					🗢 17% 💽
≡			<b>iC Mobile Field</b> annah Harbor (183100)	)	STEVE 🔻
Q Search		Poten	tial Change Items		+ Create PCI
Status	All	EXT0000005	- Tag form		
Туре	All	Created	Posted	Type	Status
Sorted By	Created Date: V	22/07/19		External Change	Pending
Has Attachments	$\bigcirc$	Scope Descript	ion and Details		
EXT0000003 Design Change 2019-02-17 Pending	Ø	Request for Qu	otation Vendor	Received	Comment
EXT0000002 Change in Floorir 2018-12-15 Pending	Ø ng Type	Review and Ap	10 proval		
EXT0000001 Flooring Type Cha 2018-11-10 Pending	Ø ange	There are no records			
		Date	llser Activ	on Description	
			/		

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:

1:12 PM Tue Aug 6					<b>२</b> 18% 🛙
=			<b>: Mobile Field</b> nnah Harbor (183100)		STEVE
Q Search	▼	Potenti	al Change Items		+ Create PCI
EXT0000005 Tag form 2019-07-22 Pending	Ø	EXT0000005 - Created 22/07/19	Tag form Posted	Type External Change	Status <b>Pending</b>
EXT0000004 Change Flooring 2019-04-08 Pending	Ø	Scope Descriptio	on and Details		
EXT0000003 Design Change 2019-02-17 Pending	Ø	Request for Quot	tation Vendor	Received	Comment
EXT0000002 Change in Flooring Type 2018-12-15 Pending	Ø	Review and Appr	10		
EXT0000001 Flooring Type Change 2018-11-10 Pending	Ø	There are no records h			
		Date	llser Actio	on Description	

An entry screen will be displayed:

1:23 PM Tue Aug 6		<b>२</b> 17% 🔲
=	<b>CMiC Mobile Field</b> Westin Savannah Harbor (183100)	STEVE 🔻
Cancel	New PCI	Save
New PCI		
Туре	Status	
	Y	V
Description		
Scope Description and Deta	ils	
ESTIMATE DESCRIPTION		

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.

			<b>liC Mobile Field</b> /annah Harbor (183100)			STEVE
Q Search	<b>T</b>	Poter	ntial Change Items		+ C	reate PCI
EXT0000005 Tag form	Ø	EXT0000002	- Change in Flooring	Туре		
2019-07-22 Pending		Created 15/12/18	Posted	Type External Change	Status Pending	
<b>EXT0000004</b> Change Flooring 2019-04-08 Pending	Ø	Scope Descrip	tion and Details			
EXT0000003 Design Change 2019-02-17	Ø	Description	Job	Cost Code	Cost	Billing
		Tile	183100	00700	\$15,000.00	\$15,000.00
Pending		Total			\$15,000.00	\$15,000.00
EXT0000002 Change in Flooring Type 2018-12-15 Pending	Ø	Request for Qu	lotation Vendor	Received	Comme	nt
EXT0000001 Flooring Type Change 2018-11-10 Pending	Ø	Tile Review and Ap	TBD		Commen	
		There are no record				

#### The following screens show the Detail sections:

			<b>MiC Mobile Field</b> avannah Harbor (1	83100)		STEVE
Q Search	<b>T</b>	Pot	ential Change Iten	าร		+ Create PCI
EXT0000005 Tag form	Ø	Request for (	Quotation			
2019-07-22 Pending		Description	Ver		Received	Comment
EXT0000004 Change Flooring 2019-04-08 Pending	Ø	Review and A		-		
EXT0000003 Design Change 2019-02-17 Pending	Ø	There are no reco	rds here to review			
EXT000002	Ø	Date	User	Action	Description	
Change in Flooring Type 2018-12-15 <b>Pending</b>		2018-12-15	Steve Cangiano	Record updated	Total Budgete to 15,000.00	ed Amount changed from 0.00
EXT0000001	D	2018-12-15	Steve Cangiano	Record updated	Total Billing A 15,000.00	mount changed from 0.00 to
Flooring Type Change 2018-11-10 <b>Pending</b>		2018-12-15	Steve Cangiano	Added Document	7611524 - 06	6400 - PLASTIC PANELING
		Attachment	s			

1:33 PM Tue Aug 6			<b>?</b> 16% 🕞
=		CMiC Mobile Field Westin Savannah Harbor (183100)	STEVE 🔻
Q. Search	<b>T</b>	Potential Change Items	+ Create PCI
EXT0000005 Tag form 2019-07-22 Pending	Ø	Attachments	
EXT0000004 Change Flooring 2019-04-08 Pending	Ø	Specifications Man	
EXT0000003 Design Change 2019-02-17 Pending	Ø	066400 - PLASTIC PANE	Ð
EXT0000002 Change in Flooring Type 2018-12-15 Pending	Ø	Related Objects	
EXT0000001 Flooring Type Change 2018-11-10 Pending	Ø	A	

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				<b>?</b> 16% 💽
	Wes	CMiC Mobile Field stin Savannah Harbor (183100)		STEVE 🔻
Cancel		Edit PCI		Save
EXT0000002 - Cha	ange in Flooring Type			
Created	Posted	Туре	Status	
12/15/2018		External Change	Pending	V
Scope Description a	nd Details			
ESTIMATE DESCRIP	TION			
Tile				
ESTIMATED AMOUN	Т			
10000				

# Journal – Screen

:01 PM Tue Aug 6		<b>CMiC Mob</b> Westin Savannah H			STEVE
		JOURNALS	6	Copy Journal Entry	New Journal Entry
Q Search LIST OF JOURNALS 07-24-19-01	Pre	2 <b>-24-19-01</b> epared By: eve Cangiano	Status SUBMITTED	Date Crea Wednesd	ated lay, July 24 2019
2019-07-24 Prepared By Steve Cangiano	Ra No	in Day	Wind 5.1	Precipita <b>0</b>	tion
<b>07-22-19-01</b> 2019-07-22 Prepared By Steve Cangiano	Ø Sk	y ouds	Low Temperatur 71.49	re High Tem 83.46	nperature
<b>07-18-19-01</b> 2019-07-18 Prepared By Steve Cangiano	l Ha	tivities alf of my expected crea oouring concrete for m ernoon, but is expecte	nost of the morning.	We hope to make up fo	or lost time in the
<b>07-17-19-01</b> 2019-07-17 Prepared By Steve Cangiano	n.	l invite some additiona e my progress photos ea			0 0
<b>05-28-19-01</b> 2019-05-28 Prepared By Steve Cangiano	<i>Q</i>	ttachments			
		•••	<b>e</b>	eda ta dianlau	

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**

		<b>1obile Field</b> ah Harbor (183100)		STEVE •
	JOURN	ALS C	opy Journal Entry	New Journal Entry
Q Search	07-22-19-01			
All Pending Submitted	Prepared By: Steve Cangiano	Status PENDING	Date Cre Monday,	ated July 22 2019
Sorted By Created Date: V	Rain Day	Wind	Precipita	ition
Has Attachments	No	6.2	0	
<u> </u>	Sky	Low Temperature	High Ten	nperature
2019-07-17	Haze	74	90	

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

2:02 PM Tue Aug 6				<b>?</b> 16% 🔳
≡		<b>1obile Field</b> ah Harbor (183100)		STEVE 🔻
	JOURN	ALS	Copy Journal Entry	New Journal Entry
Q Search	07-24-19-01			
All Pending Submitted	Prepared By: Steve Cangiano	Status SUBMITTED	Date Cre Wednes	eated day, July 24 2019
Created Date: 🔻	Rain Day	Wind	Precipit	ation
Has Attachments	No	5.1	0	
$\bigcirc$	Sky	Low Temperatu	ure High Tei	nperature
2019-07-18	Clouds	71.49	83.46	

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 **unit** icon at the bottom of the screen.

#### **Screen's Main Controls**

All	Pending	Submitted	: Journal Type Selection (All/Pending/Submitted)
	b select the ty becomes ava	1 5	als to display. When Submitted is selected, the [Copy Journal Entry]

Q Search ...

#### : Search/Filter Listed Journals

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

#### : 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 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*).

**Copy Journal Entry** 

### General - Tab

2:28 PM Tue Aug 6			<b>obile Field</b> h Harbor (183100)		₹ 15% STEVE ▼
		JOURNA	ALS Copy	Journal Entry	New Journal Entry
Q Search	) <b>T</b>	07-22-19-01			
<b>07-24-19-01</b> 2019-07-24		Prepared By: Steve Cangiano	Status PENDING	Date Cre Monday,	ated July 22 2019
Prepared By Steve Cangiano		Rain Day <b>No</b>	Wind 6.2	Precipita <b>0</b>	ation
<b>07-22-19-01</b> 2019-07-22 Prepared By Steve Cangiano	0	Sky Haze	Low Temperature 74	High Ter <b>90</b>	nperature
<b>07-18-19-01</b> 2019-07-18 Prepared By Steve Cangiano	Ø	concrete footings for t	rew showed up on the job situ he parking garage, will attem nake up for lost time. Weathe	pt to get a large	r crew in here
<b>07-17-19-01</b> 2019-07-17 Prepared By Steve Cangiano	Ø	delays report Area			
<b>05-28-19-01</b> 2019-05-28 Prepared By Steve Cangiano	Ø	Attachments	×	X	
		J	8	_	

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 *i* if "Pending" is selected in the Filter icon's drop-down menu, or *i* if "Submitted" is selected.

#### **Create/Edit Mode**

			Westin		<b>obile Field</b> n Harbor (183	3100)			STEVE •
Back			Save	Submit					
eneral	Manpower	Labor	Own Equipment	Trade E	Equipment	Materials	Deliveries	Visitors	
nits Co	mplete Saf	ety							
DATE									
Monday	y, July 22 2019	)							
SKY					WIND				
Haze				•	6.2 •				
LOW TEN	ИР				HIGH TEMP				
74					90				
PRECIPI	TATION				RAIN DAY				
0					Yes No				
AREA									
									•
ACTIVITY	Y								
Half of	my expected (	crew sho	wed up on the job site	e todav. M	las unable to	pour concre	te footings for	the parking (	narage
i luii oi	ing expected (	51511 5110					weather fiel		ga. 490,

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 🕈 an	
from the photo log, the Folder icon $\bigcirc$ to add any document add them as attachments.	s, or the Camera icon $\textcircled{O}$ to capture photos and
Data Recovery Confirmation	

Data Recover	ry Confirmation
You have Cached data ID : 191217-01. Recove	that can be recovered for Journal or data?
Recover	Discard

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

19 PM Wed A	Aug 7			CMiC Mobile		100)			<del>≈</del> 39% STEVE	
Westin Savannah Harbor (183100)       Back     Journal 07-22-19-01     Save										
General	Manpower La	abor Ow	n Equipment	Trade Equi	pment	Materials	Deliveries	Visitors		
Units Co	mplete Safety	,								
			NO. C WORKI	REG H	OURS	OT HOURS	DOT HOUR	S DAILY HOU		
TOTAL AS	OF 2019-08-07 0	1:19 PM	311	22	62	0	0	226	52	
× Texa	as Electric		6	٤	3	0	0	48	3 🏓	
Installing	safety fence									
Grar	nd River Material S	Supplies	1	2	Ļ	0	0	4		
	American Tile Inc.		4	٤	}	0	0	32	2	
				+ -	tap	o to add en	try	(	tap to edit	

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:

1:25 PM	Wed Aug 7				Ŷ	40% 🛃					
≡			CMiC Mobile F Westin Savannah Harb		STI	EVE 🔻					
Be	ok		lournal 07 00		Course Cub	mit					
	Create Manpower Record X										
Gen	COMPANY		ACTIV	ITY CODE							
Unit			•		•						
Unit	NO.OF WORKERS	REG HOURS	OT HOURS	DOT HOURS	DAILY MAN-HOURS						
	0 V	0 V	0 V	0 🗸	0						
	AREA										
					•						
тот	NOTES										
×											
Inst											
×											
_											
×	Cancel		Next		Save	,					
			+								

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	b and use the Attachment icon C to add any photos
from the photo log, the Folder icon 🕒 to add any docu	ments, or the Camera icon 🗿 to capture photos and
add them as attachments.	

#### Labor - Tab

41 PM Wed	Aug 7			CMiC Mot	oile Field				<b>奈</b> 43% 💽
			Westin		Harbor (183	100)			STEVE
Back	Save	Submit							
General	Manpower	Labor Own	Equipment	Trade Ec	quipment	Materials	Deliveries	Visitors	
Units Co	omplete Safe	ty							
			NORMA	L HOURS	OT HOU	RS DO	T HOURS	OTHER HO	URS
TOTAL AS	S OF 2019-08-07	01:40 PM	2	24	2		3	0	
Andre	ew Larson								
X	in Savannah Har	bor(183100)		8	2			0 p to edit	
_ 2 Mo	bile								
X	in Savannah Har	bor(183100)		8	0		0	0	
Brend	dan O'Hagan			0	0		2	0	
West	in Savannah Har	bor(183100)		8	0		3	U	6
						p to add er	try		
							iu y		

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

:09 AM Fri Se	p 6				CMiC Mobile Field y Street Towers (1530	)0)			♥ 59% ■ TERRY ▼
Back	Save	Submit							
General	Manpower	Labor	Own Equi	pment	Trade Equipment	Deliveries	Visitors	Units Con	nplete
Safety									
COMP	ANY	EQUIPM	ENT NAME	TRAN CODE		COST CODE	CC	OST TYPE	HOURS
					Click to been	o load equip assigned to	ment that the proje	has ct	
				G	et Equipment On J	ob			

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

CMiC Mobile Field Westin Savannah Harbor (183100)											
Back	ack Journal 07-22-19-01 Save										
General	Manpower	Labor	Own Equipment	Trade Equipment	Materials	Deliveries	Visitors				
Units Co	mplete Saf	ety									
	Ace Supply Co. Grid Roller	Inc.	Equipment Type	Expected Rental Duration							
CMiC Construction Inc Excavator - Cat			Equipment Type Large	Expected Rental Duration			Та	p to edit			
								ptocur			
				+	ap to add er	ntry					

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

11:45 AM Mon	Sep 9							🗢 🕫 89% 🔳
CMiC Mobile Field SC Hospital Facility (16006)								
Back			Save	Submit				
General	Manpower	Labor	Deliveries	Visitors				
Units Co	mplete Saf	ety						
Searc	h		Search PO	Enter PO number a the [Search PO] b				
Warehouse Vendor Diamond Contracting Purchase Order Release Number					Recei	ver		Ĺ
16006	i.230		1				L	Tap to edit

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

2:59 PM Wed	Aug 7							🗢 63% 💽
≡			Westin	CMiC Mobile Field Savannah Harbor (183	3100)		•	STEVE 🔻
Back	1	Save	Submit					
General	Manpower	Labor	Own Equipment	Trade Equipment	Materials	Deliveries	Visitors	
Units Co	mplete Saf	ety						
-	Smith Supply Co. Inc		03:00 PM	Yo	e K	Smi	ith	
				+				

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  $\textcircled{\bullet}$  and use the Attachment icon  $\textcircled{\bullet}$  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

08 PM Wed	Aug 7							<b>奈</b> 65% 💽	
			Westin	CMiC Mobile Field Savannah Harbor (183	3100)			STEVE 🔻	
Back Journal 07-22-19-01 Save									
General	Manpower	Labor	Own Equipment	Trade Equipment	Materials	Deliveries	Visitors		
Units Co	mplete Saf	ety							
PROJ	ECT TOTALS AS	SOF	WM	QTY TODAY	CURRENT POSTED QT	FORECAST Y PROJECTE QTY		NAL IATE QTY	
■ 18310 03114	)0 41 Concrete		CY	8	0	0	0		
■ 18310 09250	)0 ) Drywall		LF	10	0	0	0	p to edit	
					ap to add er	ntry			

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

14 PM Wed A	Aug 7									<b>奈</b> 67% 📧
				West	CMiC Mobil in Savannah H		3100)			STEVE 🔻
Back Journal 07-22-19-01 Save									Submit	
General	Manpov	wer La	bor	Own Equipmen	Trade Equ	uipment	Materials	Deliveries	Visitors	
Units Co	mplete	Safety								
INCIDEN	ITS									
CONCER	NS									
RECORD	S									
ADDITIO	NAL NOT	ES								
JOB HAZ	ZARD ANA	LYSIS								

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

# Punch List - Screen

ø

Tap the Punch List icon Punch List to launch the Punch List screen. This screen contains punch lists which is a todo 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**

10:46 AM Tue Nov 19 CMiC Mobile Field Steam Whistle Brewing (1904	₹ 70%
Y         Q         Search 7 Items         Punch List	<b>II</b> (#
Bare Wires Contested IT-002	ANNOTATION 2019-11-11
Wrong Fan Failed IT-005	2019-11-11
Chipped Concrete Closed IT-004	
Missing Pipe Contested IT-003	2019-11-11
reviewers during creation? Contested IT-006	
weird reviewer interactions Contested IT-007	•
new rec Draft	€ CT-002

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

## E 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.

0	Bare Wires Contested IT-002	A B ANNOTATION 2019-11-11
0	Wrong Fan Failed IT-005	2019-11-11

#### **T** Filter Menu – Icon

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

FILTERS			Reset
My Respo	nsibility		$\bigcirc$
Status	All		$\mathbf{v}$
Contact			<u>\$</u> +
Company			<u>1</u> +
Due Date			<b>—</b>
Punchlist	All		$\mathbf{v}$
GROUP BY			
Punchlist		$\overline{\mathbf{v}}$	▼ ▲
Cancel			Apply

#### **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

Bare Wires	ب <sup>2</sup> , ۱۵
Contested	
IT-002	2019-11-11

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.
- G Not synced to cloud

# **Creating and Editing a Punch List**

11:05 AM Tue Nov 19				<b>奈</b> 69% 🔳 '
≡		l <b>iC Mobile Field</b> iistle Brewing (190424)		TERRY <b>T</b>
Cancel		List Item New		Save
DESCRIPTION				
	0.		×.	
STATUS Draft V	DUE	RESPONSIBILITY		1+
PUNCHLIST				
Uncategorised				✓ +
▼ More				
Attachments				@)(0)
	There a	are no records to display		
Related Objects				()
	There a	are no records to display		
Notes				
	There a	are no records to display		

The red Create New  $\textcircled{\bullet}$  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

0

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.

Attachments	(🗁) (🖉) ( 🗠 )

#### **Related Objects**

Tapping on the Pin <sup>1</sup> 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  $\bigcirc$  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.

Add a note
------------

### [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

7:58 AM Thu Aug 8					<b>२</b> 80% 🔳
≡		CMiC Mob Westin Savannah F			STEVE 🔻
Q Search	▼	CHECKL	Complete Checklist		
COMPLETED CHECKLISTS					
<b>00000009</b> Crew Time Checklist Steve Cangiano	PENDING	00000347 - Environ Safety Created By	Date created	Status	Show More 💙
Steve Gangiano	FENDING	Steve Cangiano	08/08/19	PENDING	
<b>00000347</b> Environment, Health and Steve Cangiano	l Safety PENDING				n%
00000107 Electrical Steve Cangiano	PENDING	Checklist	Notes Attacl	hments	
<b>00000155</b> Electrical List Steve Cangiano	PENDING	(a) Are guards, screer	ns and sound dampening d	evices in place?	Y N NA
		(b) Is all fire control e	quipment regularly tested a	and certified?	Y N NA
		(c) Is emergency light 2. HEALTH	ting in place and regularly t	tested?	Y N NA
			8		

Tap the Checklist menu item Checklist 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:

8:17 AM Thu Aug 8		🗢 80% 🔳
≡	CMiC Mobile Field Westin Savannah Harbor (183100)	STEVE <b>*</b>
Q Search	CHECKLISTS	
COMPLETED CHECKLISTS	Checklist Types	
0000009		Show More 🍟
Crew Time Checklist	Q Search	Status
Steve Cangiano PE	buildsheet	PENDING
00000347	Chet's List	
Environment, Health and Sa Steve Cangiano PE	Te	0%
	Crew Time Checklist	
00000107 Electrical	EHS2	S
Steve Cangiano PE	-	
	Electrical	
00000155 Electrical List	Electrical List	Y N NA
Steve Cangiano PE	EN	
	Environment, Health and Safety	(Y) $(N)$ $(NA)$
	CANCEL	
	CANCEL	

# ▼ : Search/Filter Listed Checklists

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

#### Complete Check List

Q Search ...

## : 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

8:35 AM Thu Aug 8						🗢 80% 🔳				
≡		MiC Mobile Field avannah Harbor (183100)				STEVE 🔻				
Q Search	1	CHECKLISTS			Complete	Checklist				
00000347 - Environment, Heal	00000347 - Environment, Health and Safety									
Created By Steve Cangiano	Date created 08/08/19		Status PENDING							
						0%				
Checklist	Notes	Attachments								
1. ENVIRONMENT										
(a) Are guards, screens and sound devices in place?	dampening (Y	N NA		O	Q	▲				
(b) Is all fire control equipment reg and certified?	ularly tested	N NA		Ø	Q	▲				
(c) Is emergency lighting in place a tested?	and regularly	N NA		Ø	Q	▲				
2. HEALTH										
		/								

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  $3/7 \times 100\% = 42.86\%$ .

### **Pane's Controls**

**NOTE**: If there is a number on one of following icons, e.g. **O**<sup>1</sup> **C**<sup>2</sup> **A**<sup>2</sup>, it indicates how many corresponding items (photos/comments/issues) are associated to the checklist item.

### **Q**: Add Comment to Checklist Item

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

### **O**: Photo Capture or Add Attachment

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

### A: Create Issue for Checklist Item

Tap to create an issue against the checklist item.

## **Search & Filter Checklists**

Q Search									
All	PEN	IDING	SUBMITTED						
Туре		All	•••						
Sorted By		Date	Created 🔻						
Mine Only	$\bigcirc$	Has Issues	$\bigcirc$						

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 S 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  $\geq$ . 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 A 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 12

icon indicates the number of issues linked to the checklist item (e.g.  $\mathbf{A}^{2}$ ).

# Photo Log - Screen



Tap the Photo Log menu item **Provide** 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**

Q Search ... : Search/Filter Listed Records

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

🔁: Add Pho	to
<b>@</b> ~	Select photo on device
0<	Use device's camera
×-	Close the add new options

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**

9:12 AM Tue Aug	g 20						奈 45% ■
=							
							_
Q Searc	ch	075419 - P	OLYVINYL-CHLOF	RIDE (F	PVC) ROOFIN	IG	8
		Parent	Modified	(	Original	Revision	
	All		N	ew Do	cument		
		DOCUMEN	T TYPES				
	Attachment	Project Pho	oto				$\mathbf{\nabla}$
	Inspection Photos	TITLE					- 1
		183100 P	hoto_001.jpg				
	Project Photo	RECEIVED					
	Sketches	Aug 20, 20	019				ينصن
		BLDG-FLO	OR		CONSTRUCTI	ON TYPE	
		A-1		•	Construction	n Mgmt	•
							-
		Create No	w Document			-	Cancel
			Document				ouncer
		Parent			Revision		
		Parent			) )		

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 popup 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.

(ELD MA)										-		
View 🔻 🝸 🌆 Freeze 🖀 Detach 🛛 Search 🦝 Insert 📲 Insert Multiple 👼 Delete 🚳 Workflows 💌 🖶 Report Options 💌 🌉 Export 🚱 ECM Documents 🔍 🖧 User Extensions												
System efined	* Field	Field Description	* Renderin	д Туре	* Data T	уре	Length	* Lookup Table	Lookup Validated	Required	Updateable	Update Null
	COMPDATE	Completion Date	DEFAULT	$\sim$	Date	~	13	No LOV used				
	COMPLIANCE	Compliance	DEFAULT	$\sim$	Text	$\sim$	4	Use Valid Data as LOV	$\checkmark$			$\checkmark$
	COMTECH#	Comtech #	DEFAULT	$\sim$	Text	$\sim$	4000	No LOV used				
	CON	Contract Amount	DEFAULT	$\sim$	Numeric	$\sim$	20	No LOV used				
	CONAMOUNT	Contract Amount	DEFAULT	$\sim$	Numeric	$\sim$	12	No LOV used				
	CONAMT	Contract Amount	DEFAULT	$\sim$	Numeric	$\sim$	16	No LOV used				
]	CONST_TYPE	Construction Type	DEFAULT	$\sim$	Text	$\sim$	16	Use Valid Data as LOV				
	CONTACT_TY	Contact Group	DEFAULT	$\sim$	Text	$\sim$	20	Use Valid Data as LOV				
	CONTAMT	Contract Amount	DEFAULT	$\sim$	Text	$\sim$	20	No LOV used				
	CONTDATE	Design Start Date	DEFAULT	$\sim$	Date	$\sim$	13	No LOV used				
	CONTRACTU	Contractual Completion Date	DEFAULT	$\sim$	Date	$\sim$	13	No LOV used				
	CONTRACTUA	Contractual Completion Date	DEFAULT	$\sim$	Date	$\sim$	13	No LOV used				
	CONTRSTAT	Contract Status	DEFAULT	$\sim$	Text	$\sim$	20	Use Valid Data as LOV				
	CONTTYPE	Contract Type	DEFAULT	$\sim$	Text	$\sim$	16	Use Valid Data as LOV				
	COR	COR	DEFAULT	$\sim$	Text	~	16	Employee				
	COUNTY	County	DEFAULT	$\sim$	Text	$\sim$	4000	No LOV used				
	CPONUM	Response Days	DEFAULT	$\sim$	Numeric	~	16	No LOV used				
	CUSTOMER	Entity	DEFAULT	~	Text	~	4000	Use Valid Data as LOV				

## Setting Up User-Defined Fields for Mobile Integration

*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

AM Thu Au	ug 8 <b>CMiC Mobile Field</b> Westin Savannah Harbor (183100)	₱ 77% STEVE
<b>Q</b> Sear	T Documents	
<b>~</b>	All	470
	Attachment	156
	Business Development	0
	Completed Forms	7
<b>1000</b>	Drawings	2
	Engineering	3
·	Fillable PDF Forms	8
<b>1000</b>	Industrial Documents	1
	Inspection Photos	52
	Insurance Certificates	0
·	MEP	1
	MSDS	0

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:

PM Roles													Add PM Role	: Save Cancel	₽ 🖻 🏟
¢ ⊡ ⊞ CMIC Field Menu					Project	Roles									*
Search Go	Role					Descriptio	on					Admin Req.	Key Player	Order Seq. E	al Weight 🔺
Project: Westin Savannah Harbor (183100)	MATSUPP	Material Supplier												22	
Communication Management     Document Management	MNGR	Project Manager (WF)											V	2	
Contractor Pregualification	MOBILE	Mobile													
🕀 🎦 Bid Management 🕀 🎦 Budget & Cost Management	OFFICE	Credit Mgr												100	
Site Management     Reports	OWNER	Owner / Rep											V	1	
User-Defined Logs     Defined Logs     Defined Logs	OWNER20	Owner20										V			
🗄 🦳 Security	PGADIIN	PlanGrid Admin										V	V	1	
Partners     Contacts     Convert Partners and Contacts     User Maintenance	PGCOLAB	PlanGrid Collaborator													
	Update Role Florid,														
Change User LDAP Server	View/Create/Update/Delete All Objects	View/Create/Update/Delet	e All Document Type	:5				V M	obile Spri	ingboard	d Objects	🗹 Default Email N	otification Settin	gs.	
Role Maintenance     User Access	Restricted View All for RFIs	4								_					
Project Roles     License Pools     Subcontractor Reviews     Drawing Management     Drawing Log	Send/Receive    Receive Owner Change Order      Send Partner RFI	II Documents - Mozilla Firefo https://v10xsandboxwls.c		micpro	d/PmPre	ojRoleM	laint/ ••		□ → X ☆ =						
E Subcontractor Reviews	Redirect RFI	Update Role MNGR													
	Send Partner Transmittal Send Partner Issue Send Partner Punch List	Description	Show In Menu	Vew	Create	Edt	Delete	Link	Unlink	-					
	Send Partner Punch List ARCHITECT	TURAL		7	V	V	1	7	V						
	Posting - Voiding Addendum	6			4		1	V							
	Post PCI - External Applicant D	locuments		7	7	V	7	7	V						
	Post PCI - Transfer Attachment		<b>v</b>	1	1		1		1						
	Edit Posted PCI Awards		<b>1</b>		1		1		1		to unposted OCO's				
	Post Subcontract Base Build	ng Standards				1	1		V						
	Void Subcontract Bidding Do	cuments			4		4		1						
	Add SOV On Posted Subcontract Bidding Fol	der	<b></b>		7	V	1	7	V	- 0	fer				
	Workflow Uton - OCO			-	🗖 v	/orkflow	Button - P	ci	-						

## **Screen's Main Controls**

Q Search ...

# • : 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:

Mail 10:25 AN	1 Thu Aug 8				중 75% ■
Q. Searc	ah	Drawin	gs.pdf		8
	All	Parent		Revision 0	
	Attachment		48	New	
	Business Development		New Object	Add to Existing	
	Completed Forms				
	Drawings		RFIs	違 PCI	
	Engineering		▲ Issue	Daily Journal	
	Fillable PDF Forms	+ N	-	Cancel	<sup>2</sup> Link
	Industrial Documents				- 11
	Inspection Photos				
	Insurance Certificates				
	MEP				
	MSDS				

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:

▲ Mail 10:25 AM	Thu Aug 8			🗢 75% 🔳
Q Search	<b>T</b>	Drawings.pdf		8
Finat		Parent	Revision New Document	
	All	DOCUMENT TYPI	ES	-
	Attachment	Drawings		
17	Business Development	TITLE		
The second	Completed Forms	Drawings.pdf	Project Photo	
	Completed Forms	RECEIVED DATE	Business Development	
	Drawings	Aug 8, 2019	Completed Forms	<u>۲</u>
	Engineering	BULLETIN	Drawings 🗸	
	Fillable PDF Forms		Engineering	
1 Free	Industrial Documents	DESIGN	Fillable PDF Forms	
Contract of the local diversity of the local			Industrial Documents	
	Inspection Photos	Create New Docu	Inspection Photos	Cancel
	Insurance Certificates		Insurance Certificates	
	MEP		MEP	
	MSDS		MSDS	

Tap [Create New Document]:

◄ Mail 10:27 AM	/ Thu Aug 8			<b>?</b> 75%
≡				
Q Sear	ch	Drawings.pdf		8
		Parent	Revision	
	All		New Document	
		DOCUMENT TYPES		
	Attachment	Drawings		$\mathbf{v}$
	Business Development	TITLE		_
		Drawings.pdf		
	Completed Forms	RECEIVED DATE		
	Drowinge	Aug 8, 2019		ونصنع
	Drawings	Aug 8, 2019		
	Engineering	BULLETIN	CATEGORY	
	Fillable PDF Forms			
	Industrial Documents	DESIGN	DESIGNER	
	Inspection Photos			
		Create New Document		Cancel
	Insurance Certificates			
	MEP			
	MSDS			

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

Mail 10:28 AM Thu Aug 8					🗢 74% 🔳
CMiC Mobile Field Westin Savannah Harbor (183100)					
< Q Search	T Documents	> Drawings			
ID	Title	Revision	Date	Uploaded By	$\mathbf{>}$
DW18.0514	BU MSH ASI 100.pdf	0	09/11/18	Steve Cangiano	
DW19.0058	Drawings.pdf	0	08/08/19	Steve Cangiano	•••
DW19.0056	Sample Attachment store as document reco with revision 0	ord	28/05/19	Steve Cangiano	



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

# Drawings – Screen

∂AM Thu	Aug 8	OM	C Mobile Field			🗢 73% 🔳
	v		annah Harbor (1			STEVE <b>*</b>
<b>Q</b> Sear	ch		Drawings			
bel	Name	Revision	Trade	Version Name	Revision Date	Date Received
.00	MYLES ANNEX BASEMENT AND 1ST FLOOR PLAN	6	Architectural	ASI 3500	06-13-2019	06-13-2019
1.01	MYLES - 2ND-4TH FLOOR PLAN	6	Architectural	ASI 3500	06-13-2019	06-13-2019
1.02	MYLES 5TH-9TH FLOOR PLAN	6	Architectural	ASI 3500	06-13-2019	06-13-2019
1.10B	MYLES CENTER - BASEMENT FLOOR PLA	N2	Architectural	ASI 1800	06-10-2019	06-10-2019
I.10C	MYLES EAST - BASEMENT FLOOR PLAN	3	Architectural	ASI 1800	06-10-2019	06-10-2019
1.11A	MYLES WEST - 1ST FLOOR PLAN	2	Architectural	ASI 1800	06-10-2019	06-10-2019
3.01	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
.02	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
.03	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
3.04	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
3.05	EXTERIOR ELEVATIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
3.06	BUILDING SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
3.07	BUILDING SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
.00	WALL SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
.01	WALL SECTIONS	1	Architectural	ASI 700	12-18-2018	12-18-2018
5.00	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**

1:00 AM Thu Aug 8		Wes		<b>Mobile Field</b> nah Harbor (183	3100)		₹ 72%  STEVE
Q Search	IFC Volume 1		D	rawings			
version Name		R	evision	Trade	Version Name	Revision Date	Date Received
Trade	All	0		Architectural	IFC Volume 1	10-01-2018	10-31-2018
Work Package	All 1	0		Architectural	IFC Volume 1	10-01-2018	10-31-2018
Sort By	Date Received 🔻 D	1ST 0		Architectural	IFC Volume 1	10-01-2018	10-31-2018
A1.11A MYLE	ES WEST - 1ST FLOOR PLAN	V 0		Architectural	IFC Volume 1	10-01-2018	10-31-2018

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 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  $\mathbf{T}$ .

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

🔹 🗉 🛨 🛛 CMiC Field Menu	My Actions
	Freshmart Office Building - Chicago II
Search Go	Items Group By Typ
🖃 🗁 Project: Freshmart Office Building - Chi	Overdue (0)
	Actions
	Today (0)
	Tomorrow (0)
Outlook Import/Export	This Week (0)
Project Partner Directory	Following Week (0)
Project Contact Directory	Next 30 Days (0)
Meeting Minutes No	o Actions
Transmittals Queue	
- RFI's	
new folder document	
Document Management	
Subcontractor Pregualification	
Gill Bid Management	



Tap the xProjects 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

11:18 AM Thu Aug 8		🗢 71% 🔳
≡	Application Log Viewer	<sup>()</sup>
Current Log		Tap to refresh log
Thu, 8 Aug 2019 07:16:38 -0400		
Thu, 8 Aug 2019 07:02:55 -0400		
Thu, 8 Aug 2019 06:29:22 -0400		
Thu, 8 Aug 2019 06:18:10 -0400		
Thu, 8 Aug 2019 06:02:14 -0400		
Thu, 8 Aug 2019 05:42:54 -0400		
Thu, 8 Aug 2019 05:30:14 -0400		
Thu, 8 Aug 2019 05:20:15 -0400		
Thu, 8 Aug 2019 04:48:16 -0400		
Thu, 8 Aug 2019 04:35:38 -0400		
Thu, 8 Aug 2019 04:24:11 -0400		
Thu, 8 Aug 2019 04:16:42 -0400		

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 <u>*App's Settings – iPad*</u> 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 <u>Using Annotations</u> section in this guide.

09 AM Fri Aug 9	075419 - POLYVINYL-CHLORIDE (PVC) R	DOFING	★ 67% ★ 47% ★
	SECTION 075419 - POLYVINYL-CHLORIDE (PVC) ROOFING	Q in	sulation
	PART 1 - GENERAL		
	1.1 RELATED DOCUMENTS		Page 1 retarder. 4. Roof insulation. 5. Cover
	A. Drawings and general provisions of the Contract, including G Conditions and Division 01 Specification Sections, apply to this Sect		board. 6. Walkways. B. Section includes installation of sound-absorbing insulation
	1.2 SUMMARY		strips in ribs of roof deck. Sound
	<ol> <li>Section Includes:</li> <li>Mcchanically fastened, polyvinyl chloride (PVC) roofing syst</li> <li>Substrate board.</li> <li>Vapor retarder,</li> <li>Roof insulation,</li> <li>Cover board.</li> <li>Walkways.</li> </ol>	em International International International	Page of sound-absorbing insulation strips in ribs of roof deck. Soundabsorbing
	B. Section includes installation of sound-absorbing insulation strips in		66 matches found

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



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.
# **B** Thumbnails

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

11:12 AM Fri Aug 9			🗢 67% 🔳			
≡	<b>CMiC Mo</b> Westin Savannah		STEVE 🔻			
K Q Search		fications Management				
0	Image: Section 1         Image: Section 1           Image: Section 1					
7611524 Rev 1 066400 - PLASTIC PAN	7611545 Rev 0 075419 - POLYVINYL-C	095113 Rev 0 ACOUSTICAL PANEL CE	084113 Rev 0 ALUMINUM-FRAMED E			
R						
093013 Rev 0 CERAMIC TILING	017700 Rev 0 CLOSEOUT PROCEDUR	042200 Rev 0 CONCRETE UNIT MASO	013200 Rev 0 CONSTRUCTION PROG			

# **V**Filter Annotations

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



### **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

1:36 PM Mon Sep 9				ŝ	• 49% 🔳
× < 2 >	15400-01 Spec Sheet	Q	0	Û	88
	04000 Jenes - Jen-Frinning Genunnugai Fumps				
A	The A.Y. McDonald 840000 Series Centrifugal Pumps is designed for both high pressure and high capacity to cover a wide range of applications. These portable units are ideal for lawn and turf sprinkling, garden irrigation, pool filling, and can be used as standby pumps for fire protection as well as other commercial uses. Individually balanced heavy-duty cast iron impellers handle slit and muddied water with a minimum of effort.				
	84000 Series pumps are suitable for installation where the vertical distance from the pump to the water level does not exceed 25 feet. In all installations, friction losses in the suction pipe must be taken into consideration.				
T	This series is available in the early we mose power (nr). Th Note Copy and five horse power (HP) and require thermal overfoads to be installed separately.				
	Complete unit includes pump, mator, and suction check valve for positive priming.				
· <i>L</i> .					
2					
2		1			-

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.

### <sup>2</sup> Link Annotation to RFI or Issue

New Object	Add to Existing
1 RFI	▲ Issue

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

#### Publish 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 Note

Add note to the selected annotation.

#### Copy 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  $\bigcirc$  option on the Annotations toolbar:

100%

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  $\bigcirc$  option on the Annotations toolbar:

Text	
Sample	
Size	- 12 pt +
Font	Helvetica >
Alignment	<b>=</b> = =
Color	<b>•</b> >
Fill Color	$\checkmark$ >
Opacity	100%
Color Presets	

# 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:

		No	ote		
	evision f	or sheet Fhursday		ent by	
	⊳	→	✓	0	×
		→ ₽	✓ ¶	0 @	× ☆
□ ↔	-	-	✓ ¶	-	

# Freehand Drawing

Used to draw anywhere on a document.

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

Ink	
	-
Color	>
Background Color	$\checkmark$
Blend Mode	Normal >
Opacity	0 100%
Thickness	— 4.0 pt
Color Presets	

# Freehand Highlighting



Used to freehand highlight anything on a document.

The color, opacity, and thickness for the highlight is set using the  $\bigcirc$  option on the Annotations toolbar:

	Ink
Color	<u> </u>
Background Color	$\sim$ >
Blend Mode	Multiply >
Opacity —	
Thickness	30 pt
Color Presets	

#### 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:

- ☆ | ン

Line	
Color	
Opacity	100%
Thickness	4.0 pt
Line Style	—
Line Start	—
Line End	$\rightarrow$
Start and End Color	
Color Presets	
$\bigcirc \land \bigcirc \land \bigcirc )$	

#### 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.



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**

1:35 PM	Fri Aug 9						Ę	<b>58%</b>
$\times$	< • >{	Revision Navigator	Drawings	Ľ	Q	Q	≏	88
							-	

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.

<	<u> </u>	>					JC	-TNRPT-000111			C Q		
					JOB COSTI	NG -	TR	ANSACTION REPORT	•			Date: 29-M Time: 12:14	
Job Catego APP Job		N Batch	lame Post Date	Source	Source Desc	Refer	ence	Reference Desc	Quantity	WM	Billing Amount	Cost	Commited Cos
000111		_	Woodland A	Acres									
1	004		Electrical										
L			Labor										
JB	в	6036	31-Dec-14	PCL	PCL Constructors	000111	-0001	JB Draw 1 -	0	LS	5,000.00		
PY	С	7727	14-Apr-16	01-4309	Inc. Lydia Candle	WK		WK201615	8	LS		348.00	
PY	с	7727	14-Apr-16	02102	James Roux	WK		WK201615	1			75.00	
PY	с	7733	14-Apr-16	01-4309	Lydia Candle	WK		Weekly Payroli201615	0	LS		207.21	
PY	С	7733	14-Apr-16	02102	James Roux	WK	-	Weekly Payroll201615	0	LS		14.05	
PY	с	8094	21-Apr-16	01-4309	Lydia Candle	WK	-	WK201616	88	LS		348.00	
PY	С	8094	21-Apr-16	02102	James Roux	WK		WK201616	1	LS		75.00	
PY	С	8095	21-Apr-16	01-4309	Lydia Candle	WK		Weekly Payroll201616 10 hou	Irs o	LS		207.22	
PY	С	8095	21-Apr-16	02102	James Roux	WK	S	Weekly Payroll201616	0	LS		14.04	
PY	С	8097	28-Apr-16	01-4309	Lydia Candle	WK		WK201617	8	LS		348.00	
PY	С	8098	28-Apr-16	01-4309	Lydia Candle	WK		Weekly Payroll201617	0	LS		207.22	
PY	С	8100	05-May-16	01-4309	Lydia Candle	WK		WK201618	8	LS		348.00	
PY	С	8101	05-May-16	01-4309	Lydia Candle	WK		Weekly Payroll201618	0	LS		207.22	
PY	С	8102	12-May-16	01-4309	Lydia Candle	WK		WK201619	8	LS		348.00	
PY	С	8103	12-May-16	01-4309	Lydia Candle	WK		Weekly Payroll201619	0	LS		207.21	
PY	C	8104	19-May-16	01-4309	Lydia Candle	WK		WK201620	8	LS		348.00	
PY	С	8106	19-May-16	01-4309	Lydia Candle	WK		Weekly Payroll201620	0	LS		207.22	
PY	С	8107	26-May-16	01-4309	Lydia Candle	WK		WK201621	8	LS		348.00	
PY	С	8108	26-May-16	01-4309	Lydia Candle	WK		Weekly Payroll201621	0	LS		207.22	
PY	С	8110	02-Jun-16	01-4309	Lydia Candle	WK		WK201622	8	LS		348.00	
PY	С	8111	02-Jun-16	01-4309	Lydia Candle	WK		Weekly Payroll201622	0	LS		207.22	
PY	С	8145	09-Jun-16	01-4309	Lydia Candle	WK		WK201623	8	LS		348.00	
PY	С	8146	09-Jun-16	01-4309	Lydia Candle	WK		Weekly Payroll201623	0	LS		207.21	
PY	С	8147	16-Jun-16	01-4309	Lydia Candle	WK		WK201624	8	LS		348.00	
PY	С	8148	16-Jun-16	01-4309	Lydia Candle	WK		Weekly Payroll201624	0	LS		207.22	
PY	с	8149	23-Jun-16	01-4309	Lydia Candle	WK		<sup>₩</sup> 1 of 7	8	LS		348.00	
PY	С	8150	23-Jun-16	01-4309	Lydia Candle	WK		Wearny . ay	0	LS		207.22	

# 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:

1:58 PM	Fri Aug 9						중 56% ■
Ξ							
< (	Q Search	D	075419 - P	OLYVINYL-CHLOR	IDE (PVC) ROOFING	;	8
Γ	ID	Title	Parent	Modified 2019-08-09	Original 2018-11-13	Revision 0	
	7611524	066400 - PLASTI	THE DATASET IN	New		Driginal	
2	7611545	075419 - POLYVII (PVC) ROOFING	and a	NA TORN CHARGE PERMIT	lew Revision	unden per schaffe	
4	095113	ACOUSTICAL PAI	DES	CRIPTION			
	084113	ALUMINUM-FRAI AND STOREFROM		ew Revision			
	093013	CERAMIC TILING		ug 9, 2019		ينسن	
	017700	CLOSEOUT PROC	Cr	eate New Revision		Cancel	
	042200	CONCRETE UNIT					
	013200	CONSTRUCTION DOCUMENTATIO					
	122200	CURTAINS AND E					
	017300	EXECUTION					
	072727	FLUID-APPLIED A					
	N						

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:

2:09 PM Fri Aug 9		<b>C Mobile Field</b> nnah Harbor (18310	0)	중 55% ■ STEVE `
		lect an Issue		Add To Selected
Q Search	IS-01246 - Envir	onment, Health a	and Safety	
IS-01246	Date Created 2019-07-24	Due Date 2019-07-2		tus
Steve Cangiano 2019-07-24	From: Steve Cangiano	To: Chet Kuc	shyt	
IS-01245 Environment, Health and Safety Steve Cangiano 2019-07-22	Responsibility: Chet Kuchyt	CC:		
IS-01244	SEVERITY	TYPE		
Environment, Health and Safety Steve Cangiano 2019-07-18	DESCRIPTION (b) Is all fire contro	l equipment regularl	ly tested and certified?	
IS-01243 Environment, Health and Safety Steve Cangiano 2019-07-18	SUGGESTION			
IS-01242 Environment, Health and Safety Steve Cangiano 2019-07-17	RESOLUTION			
IS-01241 Sample	Category	Mtnce WO	Affiliation	Area

# **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:

2:50 PM Fri Aug 9	CMic	C Mobile Field	중 53% ■
=		nnah Harbor (183100)	STEVE •
<b>۲</b> ۹ se	rch T Documents > Sp	pecifications Management	
ID	075419 - POLYVINY	'L-CHLORIDE (PVC) ROOFING	$\bigcirc$
7611	Parent Modified 2019-08-09	Original Revision 2018-11-13 0	
7611	New	Original	
0951	3 2014 1210 A 2010 ( 2018 PA) Annie (	KLONA FULL A VELTER LA COME PLANE MARKET	
0841	3 C 4000 C 40	CHART     C	
0930	3 Constructions and the second	A Section 2011     A Section 2011 (Figure 4 and an end of the section 2014) (Figure 4 and an end of the section 2014) (Figure 4 and and an end of the section 2014) (Figure 4 and and an end of the section 2014) (Figure 4 and	
0177	A to publicate of any consecution and particle basics, should upp of the approximation basics and approximate basics and particle and particle basics and particle basic basi	Audity and an advances of the Bits of the Audit of the Bits of the Bits     Audity and a start and a start of the Bits of the Bits     Audity and a start and	
0422	1 i segurar de tendes consenses en estates de la de prior parameter 100.1	<ol> <li>Source and these inclusions</li> <li>Process and the inclusion of the source of the</li></ol>	
0132			
1222	0 New Revision Edit Modifie	ed Discard Cancel	
0173	00 EXECUTION	0 13/11/18 Steve Cangiano	
0727	7 FLUID-APPLIED AIR MOISTURE VAPOR BARRIER	0 13/11/18 Steve Cangiano	

[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:

CONSTRUCTION SOFTWARE COLLABORATE
Hello Madison Radford!
You have been invited to join the New Kaiser Auditorium (T&M) team.
CMiC Constuction Inc uses CMiC   Collaborate to make teamwork simpler and more productive, in real-time. They have invited you to join the New Kaiser Auditorium (T&M) team. <u>1750 Meridian Ave San Jose, CA, 95125,</u> <u>USA</u>
Please click the button below to complete your enrollment
Join Team
You may also copy/paste this link into your browser: https://cmiccollaborate.com/cmictest/clblogin?id=11B9GT3G7I161
This invitation link will expire in 24 hours, and can only be used once.
See you soon!
Cheers, The CMiC   Collaborate Team
CMIC



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:

÷	10:58 AM	* Not Charging
CMIC		
Collat	oorate	
0011012		
		Contraction and and
		R. 11
Email		
Password		
-		
Log In		, 11-4-
Remember me		
Keep me logged i		
Remember my pa	ssword	

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

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Photos     CMC MOBLE CREW TIME SETTINGS       Camera     SERVER SETTINGS       Books     Server http://dev4v10mobile.cmic.ca:7003/c       Podcasts     LOOIN SETTINGS       Inues U     Public Cloud (URL not needed)       Cimic Approvals     Application SETTINGS       Cimic Approvals     In//Out Mode       Cimic Approvals     In//Out Mode       Cimic Approvals     Cost Code Mode       Cimic Mobile Field     Cost Code Mode       Comp Portal     EATCH TIME DIVISION SETTINGS       Normal Time 8     Cover Time 8       Corr Time 4     Cover Time 8       Numbers     TOTAL NORMAL TIME SETTINGS       Numbers     Select week start day       Total NORMAL TIME SETTINGS     Approver's Contact       Approver's Contact     Approver's Contact       Approver's Email ID     ABOUT		Siri & Search
Indus       SERVER SETTINOS         Image: Camera       SERVER SETTINOS         Image: Camera       Server http://dev4v10mobile.cmic.ca:7003/c         Image: Camera       LOON SETTINOS         Image: Camera       Application SETTINOS         Image: Camera       Image: Camera         Image: Camera       Image: Camera         Image: Camera       Application SETTINOS         Image: Camera       Image: Camera         Image: Camera       Image: Camera         Image: Camera       Batch Time Division SETTINOS         Image: Camera       Batch Time Batch		CMIC MOBILE CREW TIME SETTINGS
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Build 2.0.96		
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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

CONSTRUCTION SOFTWAR		CONSTRUCTION SOL	FTWARE . E V O L V E D
	>/	Client ID	
mikef		mikef	
	0		ø
Login	Offline Access	Login	Offline Access

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**

:10 AM					Daily C	Frew Sheet		중 41% 🔳
Condo Projects 🔻		1	70CT1	19 🔻		All Shift 🔻	Oct 25, 2019	e 🛗 🛛 📊
Saturday Sur	nday 🔹		Monda	y •	Tue	sday Wednesday	Thursday •	Friday 🔍
Responsible Person Vahdat, Marjan 💌		2	Drop-D	own Fi	elds	% 🗎	4 🖬 💄	< 🗊
Crew Member (6)	Daily	Total <sub>от</sub>	DOT	0	In/Out	Field Engineering PYUS, CONDO-PROJ, 01.01,	Estimating PYUS, CONDO-PROJ, 01.03, REG OT DOT	1 PYUS, COND
Marjan Vahdat (1610)-Architect	-	-	-	-	0	Ð	Ð	
Carl Watson (6432)-Electrician				-	Ð	0		
John Bridges (6424)-Drywaller		-	-	-	0	0	0	
John Wick (6424)-Drywaller		-	-	-	Ð	0		
Max Riley (6510)-Carpenter				-	•	Ο	0	
Tom Brady (6424)-Drywaller	-	./	1.	-	0	0	0	
Crew Total Crew Mem	bers	Time	e Totals		0	In/Out Time	0	Tasks

#### Daily Crew Sheet

Shown above are the components of a crew timesheet.

# **Screen's Main Controls**

#### lcons

%	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.
2	Copies time entered from another day to the selected day.
	Adds a new activity column to the Tasks section, highlighted above.
<b>*</b>	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.
Î	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:

3:24 PM			🗢 41% 🔲
Crew Sheet		Select Crew	
Q Search			
N	ly Saved Crews	All Crews	
Crew Code	Crew Name	Responsible Person	Edit
CHICREW	Chicago Crew	Marjan Vahdat	\$
	Cancel	Create New Crew	

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.

Select Crew	Create	© 41% ₩
Create New Cr Crew Code Crew Name Responsible Person		New Crew Details Please enter Crew Code, Name and Responsible Person
Cancel	Next	

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.

1:54 AM		🗢 42% 🛙
Select Crew	Create New Crew	
Create Ne	Q Search	_
Crew Code	C Search	-
CHICREW	(CREW-01) - Bridges, John	Responsible Person
- N	(DORSA-001) - Hadjian2312, Dorsa	
Crew Name	(CREW-05) - Hasse, John	
Chicago Crew	(PYM10000000002) - Jose, Juanita	
Responsible Person	(PPPP123456789012) - Longshanks, John	
Vahdat, Marjan	(PYM100000000001) - Mahoney, Matthew	
	(PYUS-003-PYM1) - Newton, Isaac	
	(CREW-04) - Pesche, Joe	
	(CREW-03) - Riley, Max	
	(MAR-V-001) - Vahdat, Marjan	
	(CREW-02) - Watson, Carl	
	(CREW-07) - Wick, John	_
		_
Cancel	Next	

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 (

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

				🗢 44% 💽
Create New Crew	Crew	Members		
Q Crew	8	Crew De	etails	
My Crew Members	All Crew Members	Crew Code	CHICREW	
(CREW-01) - Bridges, John		Crew Name	Chicago Crew	
(CREW-05) - Hasse, John		Responsible	Vahdat, Marjan	
(CREW-04) - Pesche, Joe		Plassa salact vo	ur Crew Members from the list	
(CREW-03) - Riley, Max		r 16836 361661 y0	ur crew members norm the list	
(CREW-02) - Watson, Carl				
(CREW-07) - Wick, John				
Back	Next			

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.

≈оо Рм ≮ Crew Members	Select Project	<del>?</del> 45% 🕻
کر Search	Crew Details	
My Saved Projects All Projects	Crew Code CHICREW	
BOLDT2 - BOLDT 2 Billing Rate Forms Test	Crew Name Chicago Crew	
BRIDGE-PRJ - Bridges Project	Responsible Vahdat, Marjan	
CONDO-PROJ - Condo Projects	Members CREW-01 Bridges, John	
MCT JOB - MCT JOB	CREW-05 Hasse, John	
PCI-WBS1 - PCI-WBS1	CREW-02 Watson, Carl CREW-03 Riley, Max	
SUBWAY1 - Subway Ext		
TOWER1 - Tower Job NYC	Please select a <b>Job</b> from the list	
Back Next		

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.

2:02 PM				奈 46% 🛃 )
<b>〈</b> Select Cost Cod	e	Summary		
Crew De	tails			
Crew Code	CHICREW			
Crew Name	Chicago Crew			
Responsible	Vahdat, Marjan			
Members	CREW-01 Bridges, John CREW-05 Hasse, John CREW-02 Watson, Carl CREW-03 Riley, Max			
Job	Condo Projects			
Tasks	02.00 Concrete Forming/Acces 01.00 Construction Layout 01.03 Estimating	sories		
	Back		Submit	

Summary screen

#### Select Shift

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

16 РМ	Daily	Crew Sheet		÷.	11% 💽
Condo Projects 🔻	Chicago Crew 🔻	All Shift 🔻	Aug 22, 2016	m	ш
Saturday Sur	Q Search		iy o	Friday	
Responsible Person Marjan Vahdat 💌	(*) - All Shift			~	m
viarjan vandat 👻	(D) - Day				
	(E) - Evening		ring DOT		nating or
Marjan Vahdat *	(N) - Night				
Carl Watson (6432)-Electrician			þ		
John Bridges (6424)-Drywaller			>		
John Hasse (142)-Management Analyst			>		
Max Riley (6510)-Carpenter			•		
Crew Total			•		

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.

1:41 PM												٩	Not	Charging 🔲
≡					Daily C	rew Sheet								
Condo Projects 🔻			170CT1	9 🕶		All	Shift 🔻			Oct	t 25, 2	019	m	<u></u>
Saturday Sund	ay 🏾		Monday	( •	Tue	sday 🔍	Wednes			Se	lect D	ate		Done
Responsible Person Vahdat, Marjan 🔻							% H	<		Octo	ober 2	2019		>
Crew Member (6)	Daily T	īotal от	DOT	0	In/Out	Field Engir PYUS, COND REG OT	D-PROJ, 01.01	S 29 6	M 30 7	⊤ 1 8	₩ 2 9	⊤ 3 10	F 4 11	S 5
Marjan Vahdat 🔶 (1610)-Architect	- -	-	-	•	0		•	6 13 20	7 14 21	8 15 22	9 16 23	10 17 24	11 18 25	12 19 26
Carl Watson (6432)-Electrician			-		0		0	<b>27</b> 3	<b>28</b> 4	<b>29</b> 5	<b>30</b> 6	<b>31</b> 7	1 8	2 9
John Bridges (6424)-Drywaller			-		0		0				0			
John Wick (6424)-Drywaller			-	-	0		0				0			
Max Riley (6510)-Carpenter			-		0		0				0			
Tom Brady (6424)-Drywaller	•				0		0			(	0			
Crew Total	•		-	-	0		0				Ð			

Daily Crew Sheet – Select Date pop-up

# **Timesheet Entry**

### In/Out Time

в РМ		Daily C	rew Sheet						⑦ Not	Charging I
Condo Projects 💌	170CT19 🔻		All	Shift 🔻			Oct 25	5, 2019	*	
Saturday Sunday	Monday 🔍	Tue	sday	Wedne	sday 🏾	Т	hursday		Fri	day 🔹
In/Out - Crew Member				%	H	2h				1
TIME IN         TIME OUT           09:00         17:00	HOURS 8.00		Field Engin PYUS, COND						_	Aiscll YUS, CON
Break Duration	0.0		REG OT							
	0.00									
Total Billable	8.00									
New Row Clear	Submit									

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 <u>App Settings</u> 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 Cre	w Sheet				
Condo Projects	•	17OCT	19 🔻	All Shift	: 🕶	Oct 2	25, 2019	<b>m</b> [
Saturday S	Sunday	Monda	y Tuesd	ay We	ednesday	Thursda	у 🔹	Friday 🗕
Field Engineering -	Marjan Vahda	it						
Trade			EQUIPMENT		TRANSACTION		HOURS	
1610-Architect			CAT1000	\$	1006	\$	- 1.00	+ 6
Union			Add Eq	uipment				
-					-			
Normal Hour	- 0.	.0 +						
Over Time Hour	- 0.	.0 +						
Double Overtime Hour	- 0.	.0 +						
Select 🖨	- 0.	.0 +						
Clear	Hours		Clear Eq	uipmont		Submit Hou	uro & Equir	omont

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**

10:33 AM			Daily Cre	ew Sheet				ৰ	F 41% 🔳
Condo Projects		OCT19 🔻		AI	I Shift	•	Oct 25,	2019 🋗	
Saturday	Sunday Mo	onday 🌼	Tuesc	iay 🌼	Wedr	nesday 🌼	Thursday	Frida	у .
Responsible Person Vahdat, Marjan 🔻					%		2 🗟	2. <	Û
Phase Quantites	Daily Total				01, 🕰		) DO-PROJ, 01.03, 1 T DOT O	Miscll PYUS, CONDO-P REG OT	
TASK Field Engineering	PHASE 01.01		UANTITY 0.0	0					
Budget Quantity: 150000 Estimating	Project Quantity: 150000	Complet	ed Units: 5	0					
Budget Quantity: 20000	Project Quantity: 25	Complete	ed Units: 25	0					
MiscII	01.06			0					
Budget Quantity: NA	Project Quantity: 1	Complet	ed Units: 1	0					
				0					
				C					3
Cancel	Subm	it Daily Qu	antities						

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.

1:48 PM		Daily C	Crew Sheet		ᅙ Not Charging 🔳
Condo Projects 🔻	170CT19 🔻		All Shift 🔻	Oct 25, 2019	الل ۵
Saturday Sunday	Monday 💿	Tue	sday Wednesday	Thursday •	Friday •
Field Engineering - Batch Entry түре нои	RS		% 💾	4 🗟 💄	< 🛍
Batch Time - 0.0	+		Field Engineering PYUS, CONDO-PROJ, 01.01,	Estimating PYUS, CONDO-PROJ, 01.03, 1	Miscil Pyus, conde
FOR CREW MEMBERS	Select All		REG OT DOT O		REG OT
MAR-V-001-Marjan Vahdat					
CREW-02-Carl Watson					
CREW-01-John Bridges					
CREW-07-John Wick	- 64				
CREW-03-Max Riley					
CREW-06-Tom Brady					
Clear Subm	it				

#### **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 (

Daily Crew Sheet					Subm	it Tim	e Shee	et							
Condo Pro	Condo Projects B40 20						2018-	2018-11-24 to 2018-11-30							
Submit Weekly Tin	nesheet			Submitt	ted time:	sheet are	e no lon	ger editai	ble, so p	olease e	nsure th	at hours	are com	plete ar	id corre
esponsible Person Marjan Vahdat											Cancel			Subm	it
Crew Member		ly Tot				iesday			Thurs				Frida		
Carl Watson 🛷	REG	от 2.0	DOT	OTHR	REG	от 0.0	<u>рот</u> 0.0	OTHR	REG	от 0.0	DOT 0.0	OTHR	REG	от 2.0	DOT
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 ().

≡.								
Veekly View Dashboard						for the we	ek of 2019	-05-17
Crews by Job				Cre	ws by Re	sponsible	Person	
lob : Condo Projects 💌								
Total Hours	This We	ek 2019-08	5-11 to 2019-0	15-17	Last We	ek 2019-0	5-04 to 2019-0	5-10
lotal Hours	Normal	Overtime	Double OT	Others	Normal	Overtime	Double OT	Others
NTUNEBUILD (INTUNEBUILD)	24.0	0.0	0.0	0.0	224.0	18.0	18.0	40.0
Total Hours	24.0	0.0	0.0	0.0	224.0	18.0	18.0	0.0

Weekly Dashboard View – Crews by Job tab

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

B40 E40 ₹         Total         Saturday         Sunday         Monday           Crew Member         REG OT DOT OTHR         RE	11 PM													ŝ	Not Ch	arging (
B40 B40 ←         Saturday         Sunday         Monday           Crew Member         REG 07 D07 0THR         REG 07 D07 0THR	🕻 Weekly Dashboard V	iew			E	Employ	ee Da	shboa	rd							
Crew Member         Total         Saturday         Sunday         Sunday         Sunday         Monday         M	CONDO-PROJ - Cond		for the week of 2018-11-2									4 to 2018-11-30 🋗				
Crew Member         REG         OT         DOT         OTHA         REG         DOT         OTHA         REG         DOT         OTHA         REG         DOT         OTHA         REG         DOT	<b>B40</b> B40 ▼															
Carl Watson         REG         OT         DOT         OTHA         DOT         DTHA         REG         OT         DOT         DTHA         REG         DTHA         REG         DTHA         REG         DTHA         REG         DTHA         REG         DTH         DTHA         D	Crew Member	Total	Total				Saturday				Sunday				lay	
Biotricon         200         20         10         0.0	orew member	REG	ОТ	DOT	OTHR	REG	от	DOT	OTHR	REG	от	DOT	OTHR	REG	от	DOT
Dryweier         200         200         200         100         0.00 <th< td=""><td></td><td>20.0</td><td>2.0</td><td>1.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td><td>0.0</td></th<>		20.0	2.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Drywater         11.0         0	John Bridges 🛷 Drywaller	20.0	2.0	1.0	0.0	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	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Crew Total 62.0 4.0 2.0 0.0 0.0 0.0 0.0 0.0 0.0 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	0.0	0.0	0.0
	Crew Total	62.0	4.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Employee Dashboard

Tap an individual crew member's hours to show the screen below.
								for	the w	eek of	2018	-11-24	to 201	8-11-0	30 🏦
Carl Watson CREW-0	2 🔻														ţ4
Job	Total				Satur	day			Sund	ay			Mond	lay	
	REG	от	DOT	OTHR	REG	от	DOT	OTHR	REG	от	DOT	OTHR	REG	от	DO
Condo Projects PYUS, CONDO-PROJ, 01.01, 1000	3.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Condo Projects PYUS, CONDO-PROJ, 01.02, 1000	17.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Condo Projects PYUS, CONDO-PROJ, 02.00, 1000	0.0	2.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Total	24.0	2.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Employee Signature						F	orem	an Sic	inatu	·e 🗸					
									, rata						
			Clea	ar Signati	ure								Clear Sig	gnature	

Employee Dashboard – Signature screen

Tap the Signature icon (<sup>(C)</sup>) 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 (.).

No Serv	ice ᅙ 1:01 PM	∦ 100% 📻 ≁
	Settings	
	Podcasts	>
<b>\$</b>	Game Center	>
Y	Twitter	>
f	Facebook	>
	Flickr	>
V	Vimeo	>
	CMiC Approvals	>
<b>(</b>	CMiC Time Tracker	>
	TestFlight	>
	restright	

#### 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.

сміс	← CMiC
Settings	LOGIN SETTINGS
	Tenant ID OFF
Tenant ID	Hours Mode ON
da	SERVER CONFIGURATION
ua	SERVER test4v10mobile.cmic.ca:7003
·····	Environment cmictestv10x
	PROXY SETTINGS
	Enable Proxy OFF
	Username
FORGOT PASSWORD	Password
$ \  \   \   \   \   \   \   \  $	

# 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**

No SIM 🗢	11:08 AM	@ 💶
≡	Timesheets	Select
All	Submitted	Unsubmitted
March 09, 2017		11:00 hrs
Tower Job NYC Construction Layor	tabs ut	8:00 hrs Labour
Tower Job NYC Construction Layo	ut	3:00 hrs Labour
March 08, 2017		10:30 hrs
Tower Job NYC Construction Layor	ut	8:00 hrs Labour

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

	Timesheets	Select			
	Submitted	Unsubmitted			
March 09, 2017		16:00 hrs			
Tower Job NYC		8:00 hrs			
Construction Layo	ut	Labour			
Tower Job NYC		8:00 hrs			
Construction Layo	ut	Labour			
left, and	timesheet entry to the Submit & Dele s become available	te			
No SIM ♥ ■	5:28 PM Timesheets	⊛ 📥 + Select	No SIM �	5:28 РМ Timesheets	@ I Sele
All	Submitted				
All March 24, 2017	Submitted	Unsubmitted 8:00	All March 09, 2017	Submitted	Unsubmitted
Company Level		8:00 hrs			18:00
Leave Expense		8.00 Hrs >	Tower Job NYC 8:00 hrs	5	Submit Dele
March 23, 2017		8:00	Tower Job NYC		8:00 hrs
		8:00 hrs	Construction Layou	t	Labour
Company Level					
Company Level Leave Expense					
		8:00			
Leave Expense March 22, 2017 Condo Projects		· · ·			
Leave Expense March 22, 2017 Condo Projects 8:00 hrs		8:00 Delete			
Leave Expense March 22, 2017 Condo Projects		8:00			
Leave Expense March 22, 2017 Condo Projects 8:00 hrs March 21, 2017 Condo Projects		8:00 Delete 8:00			
Leave Expense March 22, 2017 Condo Projects 8:00 hrs March 21, 2017 Condo Projects Field Engineering		8:00 Delete 8:00 8:00 hrs Labour			
Leave Expense March 22, 2017 Condo Projects 8:00 hrs March 21, 2017		8:00 Delete 8:00			

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

No SIM 🗢	4:47 PM	@ <b>==</b> +	No SIM ♥ ■		Select	No SM ♥		
All		Select	All	Submitted	Unsubmitted	All	Submitted	Uns
March 24, 2017	300=1100	8:00	March 24, 2017		8:00	March 09, 2017		
Company Level Leave Expense		8:00 hrs >	Company Level Leave Expense		8:00 hrs >	Tower Job NYC Construction La		8:0 La
March 23, 2017		8:00	March 23, 2017		8:00			
Company Level Leave Expense		8:00 hrs >	Company Level Leave Expense		8:00 hrs >			
March 22, 2017		8:00	March 22, 2017		8:00			
Condo Projects Field Engineering		8:00 hrs >	Condo Projects Field Engineering		8:00 hrs Labour			
	Submit		March 21, 2017		8:00		Submit	
	Сору			Сору			Сору	
	Delete			Delete			Delete	
	Schedule			Schedule			Schedule	
	Cancel		1	Cancel			Cancel	٦

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 <u>Copy</u> <u>Timesheet to Future Days</u> 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.

No SIM ♥	4:48 РМ Timesheets	⊛ 📥+ ₩Select	No SIM 🗢	5:04 PM	@ 💶 +	No SIM 🗢	5:04 PM	@ 💼 f
	nmesneets		Copy (1) 🌟	Timesheets	Cancel	Copy (1)	Timesheets	Cancel
All	Submitted	Unsubmitted	All	Submitted	Unsubmitted	All	Submitted	
March 24, 2017		8:00	March 24, 2017		8:00	March 24, 2017		8:00
Company Level Leave Expense		8:00 hrs >	Company Le		8:00 hrs	Company L		8:00 hrs
March 23, 2017		8:00	March 23, 2017		8:00	March 23, 2017		8:00
Company Level Leave Expense		8:00 hrs >	Company Le		8:00 hrs	Company L		8:00 hrs
March 22, 2017		8:00	March 22, 2017		8:00	March 22, 2017		8:00
Condo Projects Field Engineering		8:00 hrs Labour	Condo Projet Field Engine		8:00 hrs Labour	Condo Proje Field Engine		8:00 hrs Labour
March 21, 2017		8:00	March 21, 2017		8:00		Copy timesheet	
	Сору		Condo Projection Field Engine		8:00 hrs Labour		Tomorrow	
	Delete		March 20, 2017		8:00		Next Week	
	Schedule		Condo Projective Field Engine		8:00 hrs Labour		Pick Dates	
	Cancel						Cancel	

## 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

No SIM Ҿ く	10:55 AM Select Type of Cost For Condo Projects	•
	Q. Search	
Labour		~
Equipment		
Materials		

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

ne Tracker Abbasi Marjand Abbasi Marjand Abbasi	Overhead Job	Time Tracker tap to view app's menu	Marjand Abbasi Marjand Abbasi	tap to Sav timeshee to phone
Marjand Abbasi	Job		Marjand Abbasi	
ay, Mar 06 🕨	•	Monday, Mar (	06 ⊧	
Total		Total 8:00 hrs		
Normal Hour >	Hours Type		Normal Hour >	
DD-PROJ - Condo Projects 👂	Job Code	CONDO-PROJ - Co	ondo Projects >	
01.01 - Field Engineering 🗧	Cost Code	01.01 - Fiel	d Engineering >	
Labour >	Cost Type		Labour >	
tap to enter hours		Submit Time Ent	ry	
Her Hours		Discard Time Ent	ry	
	Total Normal Hour > DD-PROJ - Condo Projects > 01.01 - Field Engineering > Labour >	Normal Hour >     Hours Type       Normal Hour >     Job Code       00-PRQJ- Condo Projects >     Job Code       01.01 - Field Engineering >     Cost Code       Labour >     Cost Type       tap to enter hours     Image: Cost Code	Total Total Normal Hour > Normal Hour > Hours Type Job Code CONDO-PROJ - Co O1.01 - Field Engineering > Labour + Labour + Labou	Total     Total       Normal Hour >     Hours Type     Normal Hour >       D0-PR0J - Condo Projects >     Job Code     COND0-PR0J - Condo Projects >       01.01 - Field Engineering >     Cost Code     01.01 - Field Engineering >       Labour >     Cost Type     Labour >       Tap to enter hours     Submit Time Entry

## 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**

No SIM ♥ く	12:16 РМ Select Type of Hours	•:■) Ū
	Q. Search	
Normal Hou	ır	~
Over Time H	lour	
Double Ove	rtime Hour	
Vacation Le	ave	
Personal TI	me Off	
Non-Billable	e Hour	
Job Cost Ho	our	

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

No SIM	Ŷ			12:0 ect an A Compa				۲	*
୍ 2	000								۵
200	0.100	- Cur	rent l	Payab	les				
200	0.200	- Dec	l/Gar	n PY l	iabili	ties			
200	0.300	- Wa	ges P	ayabl	e				1
200	0.400	- Inte	erest	Payab	le				
200	0.500	- Une	earne	d Rev	enue	5			
200	0.600	- Ret	ainaç	je Pay	able				
200	0.601	- Pre	-Paid	AP (C	)epos	its)			
200	0.602	- WIF	- 0v	er Bill	ings				
1	2	3	4	5	6	7	8	9	0
-	1	:	;	(	)	\$	&	@	"
#+-		•	,	?	2	!	'		$\bigotimes$
ABC	6		2		space	2		Sear	ch

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.

No SM ♥	s:31 PM Time Tracker	~
Overhead	Marjar	nd Abbasi
Job	Marjar	nd Abbasi
Time		
Hours Type	Select Hou	urs Type
Job Code	Select Job (	Code >
Cost Code	Select Co	ost Code
Cost Type	Select Co	ost Type
tap to check in	Check In	

## **Check In & Check Out Procedures**

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

Sample of Home screen with [Check In] button

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.

	10:57 AM Time Tracker	÷ ۹	tap to Save timesheet		Home	tap to view	
Overhead	tap to view app's menu	Marjand Abbasi	to phone		Timesheets	unsubmitted timesheets	,
Job		Marjand Abbasi		-	Clear Data		т
4	Monday, Mar O	6 ⊧		ር ሀ	Logout		
	8:00 hrs						T C
Hours Type	N	lormal Hour >					Т
Job Code	CONDO-PROJ - Con	do Projects 🗦					С
Cost Code	01.01 - Field	Engineering >					
Cost Type		Labour >					C Fi
							1
	Discard Time Entry	1					C Fi

## 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.

No SIM 🗢	10:57 AM	۰	D	No SIM 😤	10:57 AM	
=	Time Tracker	8 B			Time Tracker	B 8
Overhead	tap to view app's menu	Marjand Abbas		Overhead		Marjand Abbasi
Job		Marjand Abbas		Job		Marjand Abbas
4	Monday, Mar <sub>Total</sub> 8:00 hrs	06 ⊧			Monday, Mar ( CMiC Time Tracke Timesheet submitted fo March 06, 2017	r
Hours Type		Normal Hour >		Hours	ОК	our >
Job Code	CONDO-PROJ - C	ondo Projects 🗦		Job Code	CONDO-PROJ - Co	ondo Projects >
Cost Code	01.01 - Fiel	d Engineering >		Cost Code		
Cost Type		Labour >	tap to submit timesheet	Cost Type		
	Submit Time Ent	try tap t	entry o discard e entry	-	Submit Time Entr	

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 (E).

## 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.



=	Time Tracker	8	
Overhead	Μ	arjand Abbasi	
Job	м	arjand Abbasi	
<ul> <li>▲ N</li> </ul>	1onday, Mar 06	Þ	
	Total 8:00 hrs		
Hours Type	Nor	mal Hour >	
Job Code	CONDO-PROJ - Condo	Projects >	
Cost Code	01.01 - Field En	gineering >	
Cost Type		Labour >	
_			tap to trac more tim
	Track More Time		tap to cop
	Copy Time		time





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.

No SIM 역	4:55 PM	@ <b></b> +	No SIM ♥	4:58 PM	
=	Time Tracker	<u> </u>	=	Time Tracker	×
Overhead	Marjand	Abbasi	Overhead		Marjand Abbasi
Job	Marjand	Abbasi	Job		Marjand Abbasi
∢ Th	ursday, Mar 09 🕨		∢ Th	ursday, Mar	09 🕨
	Total 8:00 hrs			Total 8:00 hrs	
Hours Type	Normal Ho	ur >	Hours Type		Normal Hour >
Job Code	TOWER1 - Tower Job NY	rc >		Copy timesheet	
Cost Code	01.00 - Construction Layo	ut >		Tomorrow	1
Cost Type	Labo	ur >		Next Week	9
	Frack More Time			Pick Dates	
	Copy Time			Cancel	

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.

Ng SiM ♥	4:58 PM	e 📫	No SIM 🧐			12:24 PM			@ \$ 🔳
=	Time Tracker		< -			Сору			Done
Overhead		Marjand Abbasi	Begin	Date				March 14	4, 2017
Job		Marjand Abbasi	End D	ate				March 18	5, 2017
					M	arch 20	17		
			S	М	т	W	т	F	S
	Thursday, Mar	09 🕨	26			1	2	3	4
			5	6	7	8	9	10	11
			12		CMIC	Time T	racker		18
	Total 8:00 hrs		19	Ar	e you sure	you want		this	25
Hours Type		Normal Hour >	26					_	1
COLOR COLOR			2		NO		YES		
	Copy timesheet		Comp	any Lev	rel			8:	:00 hrs
	Tomorrow								
	Next Week	_							
	Pick Dates	1							
	Cancel								

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 (2) 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:

	een made to recover the username and password for your CMIC account.
User Name: MA	RJAND
To change your	password please click on:
http://test4v10	.cmic.ca:7785/cmictestv10x/Sdmenu/changePassword.jsp?id=464142782271499071569
This link will ex	pire in one hour, after that you will have to send a new request.
This link will ex	pire in one hour, after that you will have to send a new request.
This link will ex Sincerely,	pire in one hour, after that γou will have to send a new request.

Opening the link opens the password reset page:



# **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**

11:18 AM Wed Jan 15		奈 24% ∎⊃
Settings	CMiC Time Tracker 2	2.0
€tv TV		
🌸 Photos	ALLOW CMIC TIME TRACKER 2.0 TO ACCE	iss >
Camera	Siri & Search	
Books	CMIC TIME TRACKER 2.0 SETTINGS	
Podcasts	Server URL http://test4v10bi.cn	nic.ca:7003/c
🞓 iTunes U	Public Cloud	
😫 Game Center		
	ABOUT	
CMiC Approvals	Version	1.0.2
CMiC Mobile Crew Time	Build	2
CMiC Mobile Field		
CMiC Time Tracker		
CMiC Time Tracker 2.0		
Comp Portal		
🕳 GarageBand		
🔀 iMovie		
E Keynote		
Numbers		
Z Pages		
L TestFlight		
<b>Z</b> oom		

## 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: <u>http://test4v10bi.cmic.ca:7003/cmictestv10x</u>.

## 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**

	Timesheet	≡
<	Period Ending 2020-01-21	>
Period Total		0.0 hrs
Submit Ho	ours Ade	d Time Entry

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 (<del>E</del>)

Timesheet 🗧							
<	Period 2020-		Marjan Vahdat				
Period Total		<b>~</b>	Share Logs				
			Sign Out				

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 ( $\checkmark$ ) 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.

ser Details

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.

т	ïme Entry	
Job	Overhea	ad
Date		
yyyy-MM-dd		Ê
Job		
Select		\$
Phase		
Select		\$
Category	PCI	
Select	♦ Select	\$
Hours Type	Hours	
NWHR	\$	
-		
Save Copy	From Clear	Cancel

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.

<	< Job List						
	Saved All						
٩							
PYUS: BOLDT2 - BOLDT 2 Billing Rate Forms Test							
PYUS: B	PYUS: BRIDGE-PRJ - Bridges Project						
PYUS: C	ONDO-PROJ - Con	do Projects					
PYUS: M	ICT JOB - MCT JOE	В					
PYUS: P	CI-WBS1 - PCI-WB	\$1					
PYUS: S	UBWAY1 - Subway	/ Ext					
PYM1: TOWER1 - Tower Job NYC							

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 (<sup>4</sup>)

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.

Timesheet	≡
< Period Ending 2020-01-21 >	
Period Total	8.0 hrs
Wednesday January 15	8.0 hrs
Condo Projects (CONDO-PROJ) Estimating - Labour	8.0 hrs NWHR
Submit Hours Add Time	Entry

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:

- 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.

4:44 PM Wed Dec 19 Setti	gs	CMiC Pay Stub	? @
BIM 360 Docs		MIC PAY STUB TO ACCESS	-
🕚 Blinkist		ri & Search	
Bluebeam Vu	Sir	ri & Suggestions	
S Business	CMIC PAY	STUB SETTINGS	
Classical FM	PREFEREI	NCES	
CMiC Mobile Crev	Time Date Fo	ormat	Common (mm/dd/yyy
CMiC Mobile ECM	Currenc	cy	USD "S
CMiC Mobile Field			
CMiC Pay Stub		CONFIGURATION	(
CMiC Subcontrac	or Rating	URL http://v10xsandboxmobile.cmic3	60.com:7004/cmicprod
Dictionary			
S Elevate	PROXY SI	ETTINGS	
Excel	Enable	Proxy	C
SineScanner	Usernar	me	
🛹 Formula 1	Passwo	rd	
G Google			

The iPad's Settings screen, launched by tapping the Settings icon *w*, 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

10:10 AM Thu Dec 20		🗢 🕑 53% 💷
≡	CMiC Pay Stub	
	Pay Date <ul> <li>12/16/2018</li> <li>Period Ending 12/16/2018</li> </ul>	
	Current	YTD
Gross Wages	\$1,250.00	\$37,500.00
Benefits	0	\$6,309.99
Deductions and Taxes	(\$396.93)	(\$13,809.88)
Net Pay	\$853.07	\$30,000.11
Payments		
Leave Balance		

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

10:46 AM Thu Dec 20	≡	Select Pay Pe	riod
A Home	Pay Date	Start Date	End Date
0.0	12/16/2018	12/10/2018	<b>12/16/20</b> 18
Select Period	☑ 12/09/2018	12/03/2018	<b>12/09/2</b> 018
	☑ 12/02/2018	11/26/2018	<b>12/02/201</b> 8
Ē	11/25/2018	11/19/2018	<b>11/25/2</b> 018
Clear Data	tap to launch Select Pay Period screen	11/12/2018	11/18/2018
	11/11/2018	11/05/2018	11/11/2018
Logout	11/04/2018	10/29/2018	11/04/2018

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.

10:44 AM	Thu Dec 20			穼 🕑 48% 🗖
≡		Select Pay Pe		esh screen with period details
	Pay Date	Start Date	End Date	Amount
¥	12/16/2018	12/10/2018	12/16/2018	\$853.07
<b>⊻</b>	12/09/2018	12/03/2018	12/09/2018	\$853.07
Ø	12/02/2018	tap to open pay stub for selected pay period	12/02/2018	\$853.07
	11/25/2018	11/19/2018	11/25/2018	\$853.07
	indicates previously selected pay period	11/12/2018	11/18/2018	\$853.07
	11/11/2018	11/05/2018	11/11/2018	\$853.07
	11/04/2018	10/29/2018	11/04/2018	\$853.07
	10/28/2018	10/22/2018	10/28/2018	\$853.07

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

9:26 AM Thu Dec 20	o navigate back to	Gross Wages	🗢 🕑 61% 🔲
Pays	Stub screen	Pay Date 12/16/2018 Period Ending 12/16/2018	
	Hours	Current	YTD
Normal Hours	40	\$1,250.00	\$36,750.00
Leaves	0	tap to drill-down further into leave details for this pay period 0	\$750.00

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.

9:26 AM Thu Dec 20		Leaves	? @ 61% 🗩
tap to return to Gross Wages s		Pay Date 12/16/2018 Period Ending 12/16/2018	tap Home icon to return to Pay Stub screen
	Hours	Current	YTD
Vacation	0	0	\$750.00
Leaves	0	0	\$750.00

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**

9:30 AM Thu Dec 20		🗢 🖲 60% 🔲
<	Benefits	
	Pay Date 07/15/2018 Period Ending 07/15/2018	
	Current	YTD
Auto	0	\$459.99
Bonus	\$850.00	\$5,850.00
Benefits	\$850.00	\$6,309.99

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**

9:27 AM Thu Dec 20		🗢 🕑 61% 🔲
<	Deductions and Taxes	
tap to drill-down into deductions and tax details for this pay period	Pay Date 12/16/2018 Period Ending 12/16/2018	
	Current	YTD
Deductions	\$25.00	\$759.20
Taxes	\$371.93	\$13,050.68
Deductions and Taxes	\$396.93	\$13,809.88

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.

9:27 AM Thu Dec 20		🗢 @ 61% 💽
< 🔪	Deductions	<b>A</b>
tap to return to Deductions and Taxes screen	Pay Date 12/16/2018 Period Ending 12/16/2018	tap Home icon to return to Pay Stub screen
	Current	YTD
401K	\$25.00	\$759.20
Deductions	\$25.00	\$759.20

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.

	🗢 🕑 61% 🔲
Taxes	Â
Pay Date 12/16/2018 Period Ending 12/16/2018	tap Home icon to return to Pay Stub screen
Current	YTD
\$213.53	\$7,874.04
\$18.14	\$544.20
\$77.57	\$2,327.10
\$62.69	\$2,305.34
\$371.93	\$13,050.68
	Pay Date 12/16/2018           Period Ending 12/16/2018           Current           \$213.53           \$18.14           \$77.57           \$62.69

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**

9:27 AM Thu Dec 20			穼 🕑 61% 🔲
<		Payments	
		Pay Date 12/16/2018 Period Ending 12/16/2018	
	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

9:27 AM Thu Dec 2	0			🗢 🕑 61% 🗖
<		Leave Balanc	е	
Pay Da 12/16/2 Period Ending 1:				
	Carried	Eligible	Used	Balance
Sick	0	80	0	80
			24	

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 ma	USER MAINTENANCE 🚺 🔂 😨 🛆 🗎 🕅 🗘 🖈
Preferences	The second se
Forms	User
▶ Logs	* User ANDREWV12 SaveiRefresh
Reports	General Assign Roles System Privileges Configuration Privileges Consolidations Access Company Access Employee Security Compliance Security
✓ Security	🖾 Search 📇 Insert 🐳 Previous 🗰 Next 🚳 Workflows 👻 🔂 Report Options 👻 🔮 ECM Documents 👻 🖧 User Extensions
Roles	* LDAP Server Default 🗸 🖉 Database User
⊿ Users	* Password * Re-Type Password
User Maintena	Employee No. [113]
User ID Mappin	* First Name Andrew
	* Last Name   Home * Company ZZ Q CMC Test Company
Project Manag	* Company 22 Q Culturest Company
► Logs	User Treeview CMIC TRD Q CMIC Enterprise
Payroll Security	Default Console Q
Job/Project Securit	
Compliance Securi	"E-mail andrew@cmic.ca
Departmental Secu	Phone 416-736-0977
Field Security	Fax Address Code Q
Maintain License P	Andrew Home
· · · · · · · · · · · · · · · · · · ·	123 Lakeshore Drive Business Address Chicago IL 61254

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.

Enterprise 12c Enterprise 12c Forms RP	Menu	CMIC Field Emp	ployee Console	Edit N	de								
user ma	E	MPLOYEE PROFILE				Table	Mode 💾 S	ave 🍺 E	it 💣	00	▲   ₽	•	0
Preventive Maintenance	Т		Foreign Addres	s			📋 Foreign A	idress					^
▶ Material Sales													
▶ Fixed Assets													
US Payroll		* Zip Code				Physical Zip Code							
⊿ Setup		* Country Code		٩		Country Code		٩					
Set User Defaults		* State/Province		٩		State/Province		٩					
Company		County/Region	Q,										
✓ Employees		City/Town	Q,										
	Ľ	Home Phone			Work Phon	•							
Employee Pro		Home Fax			Work Fa	x							
Employment H		Cell Phone			Work Cell Phon	e							
Direct Deposit		Email Address			Work Email Addres	s							
Loans and Adv		Pager											
Leaves		Latitude			Business Partner Cod			_	P/Vendo	e.			
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Deductions												_	
Gross IDs		Country											
Change Manar	I.	Country										_	Ļ

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.

Enterprise R12 Enterprise R12 (Forms) HCM	N	Enterprise non-BI PM E-time			oloyee Console Edit Mode			
Search for programs		-	Comment Man			Subject, New Mode Required		<u>^</u>
			ation Reassigne			Hide View Check Box for FYI		
PR-00006 - City Mall Q	2	Start Notification List	t with all Notifica	ations		Img_Reassign_Return_Flag		
CMiC Search	^	Registered Invoice Notific	cation Header D	isplay	Current 🛩	Alert Email Header	All open notifications. Please use the Workflow	Notification List to review these items:
Image Manager		Display invoice informati	tion in workflow	alerts	0		,	4
∡ Imaging		Hide Mr	lobile Link in WF	F Alert				
⊿ Setup						Alert Sender Email Override		
System Options		MOVE FUNCTION						
System Options	11			C	All Document Types	Delete if Target is Checked		
Document Types	L				CMIC JC Transaction	CMIC AP Lien Waiver	CMIC AP Voucher Display Invoice	CMIC Vendor Compliances
Sources	L				Check Doc	Daily Journal - DWP	Emails	ICM Tickets
Flysheets	L		Delete Flysheet	t Data	MAJOR COMMITMENT COMPLIANCE	PM ATTACHMENTS	PM ECMPCI	PM ECMSUBS
Viewer by Type	8				PO Job Shipment	RAD HR Certifications	RAD HR Documents	RAD Registered Pay Request
Imaging Control					RJG Reg Invoice	SB Registered Invoices	SB SC Pay Request	Uncategorized Document
▶ Utilities		IMAGE MANAGER						
Image Search	Ľ				ts Size 100		Copy PM RFP to I	maging 🗌
Image Manager					hit Flag			
Exception Manager			SC RFP D	ocument	nt Type SB SC Pay Request 🗸		SC RFP	Source prod_source ~
		Paj	yroll Expense D	ocument	nt Type RJG Reg Invoice 🗸		Payroll Expense	Source prod_source V
Reactivate Deleted Images	н.		Save	Filter Op	ptions		Save Frames Dime	ensions 🗹
▶ Workflow		MISCELLANEOUS OPTION	S					
Outlook Server Configuration			ve MIP Output a					
Security Role Maintenance		Alle	low ECM Search		n ECM			
CUSTOMER RELATION SHIP MANAGEMENT	*				n ECM 🗹			

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: <u>https://support.apple.com/en-us/HT208109</u>.

#### 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 <u>Approval app</u> 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

Capture     Validate     Submitted	РМ =	CMiC eXpense	रू 799 Q
		No Receipt has been captured yet	

CMiC Expense Main Screen – Capture tab

#### Main Menu Icon (🗮)

3:24 PM		<b>?</b>	79% 🔲
≡ CMiC e	Xpense	Q	Y
Signed in as Melissa 1. Ap Misc. Invoice ZEMP0005-Melissa Afkari: 1 Liberty Plaza			
Sign Out	🔟 Clear Data		

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 (



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 (III) 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.

1:16 AM		<b>奈</b> 99% <b>€</b>
<	Captured Receipts	<b>4</b>
Vendor *		
ZEMP0005 - Melissa Afka	ari: 1 Liberty Plaza	
Document Type *		
1. AP Misc. Invoice		3
Invoice Number *		
11-26-2019-11-15-49		
Invoice Amount *		
\$40.76		
Date *		
Nov 26, 2019		
Description		
Food		
	Thai Express	
	4700 Keele Street, # CRU 8 Toronto, ON, M3J 1P3	
	TRANSACTION RECORD	
	TYPE: PURCHASE	

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 (1) 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

12:01 PM				<b>?</b>	95% 🔲
≡		CMiC eXpense		Q	
	Capture	Validate	Submitted		
2 References References No. The References No. The	11-26-2019-11-15-49				
12 Mar. Structure 1 14 Mar. March 10 M	\$40.76				
	Nov 26, 2019				

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.

2:43 PM Thu Apr 9		<b>?</b> 791	6
<	Allocatio	ns Details	
×			
Distribution Type *		Company *	
(J) Job Cost Transaction	>	(10) CMiC Construction Inc.	>
Job/Dept/Eqp. *		Cost Code/Account/Category*	
(SUN0001A) Main Building Etc	>	(01550) General Conditions - Job Facilities ( \$3,250)	>
Cost Type/Tran Code		WM Code	
(O) Other/Sundry	>	NA	
Quantity		Amount*	
1.00		\$89.11	
Description *			
TARGET EXPECT MORE. PAY LESS:			
	Sa		

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.

2:11 PM Mon Apr 6		2:12 PM Mon Apr 6	🗢 🕇 95% 📖 )
< Allocation	s Details	<	Company
Distribution Type *	Company *	Q Search	
E	Quantity	B Company B (GBP)	
Equipment Transaction 1 G		90 90 Construction Company	
GL Transaction	Description * O TARGET PAY LESS:	99 ABC Inc.	
Job Cost Transaction		12223 ALEC	
Work Order Transaction		008 ALEMCO	
		005 Alec Engineering Contracting	
		ALPHA Alpha-Zeta Inc.	
		AD1 Alrina Group of Companies	
		TQ12B Brendan's TQ12 Company	
		0057 Bridge	
5 ĉ 🖪		40 CMiC Australia, LLP	
<b>q w e r t y</b>	<sup>7</sup> <sup>8</sup> <sup>9</sup> <sup>0</sup> p	30 CMIC Construction Canada	
a s d f g		10 CMIC Construction Inc.	
☆ <sup>∞</sup> <del>×</del> + = // z x c v b	;::::::? n m ; . 企	20 CMiC Specialties Inc.	
.?123	.?123	ZZ CMiC Test Company Inc.	

# Submitted - Tab

1:12 PM			<b>२</b> 89% <b>—</b> )∙
≡		CMiC eXpense	Q M
	Capture	Validate	Submitted
2 Carrierant	11-26-2019-11-15-49 \$40.76 Nov 26, 2019		
Province of the second	<b>11-14-2019-03-50-37</b> <b>\$30.98</b> Nov 14, 2019		

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

7:01		ı∥ ≎ 🖿
Captured	Receipts	
Vendor *		
ZEMP0005 - Melissa /	Afkari: 4850 ke	eele St
Document Type *		
1. AP Misc. Invoice		3
Invoice Number *		
07-29-2021-07-01-37		
Distance	Rate	
33.00	\$ 0.65	
	*	
Invoice Amount *		
<b>\$</b> 21.45		
Date *		
Jul 29, 2021		
Description downtown to CMiC		

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.

				No SIM 🐨	7:06 PM	@ % 📥 🖊
				Settings To	ouch ID & Passcode	
No SIM 9	P 7:06 PM Settings	€ \$ <b>—</b> +				
C	Do Not Disturb	>		iPhone Unlock		
				Apple Pay		$\mathbf{\tilde{\mathbf{O}}}$
Ø	General	>		iTunes & App St	ore	$\overline{\mathbf{O}}$
AA	Display & Brightness	>		Use your fingerprint buying from the iTur	instead of your Apple ID par nes & App Store.	sword when
*	Wallpaper	>	Register and scan	FINGERPRINTS	na a ripp orana.	
<b>4</b> 0)	Sounds	>	fingerprint	Finger 1		>
5	Siri	>		Add a Fingerprin	nt	
	Touch ID & Passcode	>				
	Battery	>		Turn Passcode		
	Privacy	>		Change Passco	de	

# 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.



Tap the **Home** menu option for the <u>Home screen</u>.

# Unsubmitted Unsubmitted

Tap the Unsubmitted menu option for the Unsubmitted Reviews screen.



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.



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

# Home – Screen

SIM 🗢	4:27 PM	@ 🕴 61% 💻 🗲	
≡ СМі	C Subcontractor Rat	tings	
<b>Q</b> Search			searches & filters
CA-CENT CA-EAST	T USNE USNW USS	E USSW CA-WE	- Territories filter
1234567891 AIRP	PORTS COMMERCIAL CO	RP HIGHWAY F	Market Sectors filter (COMMERCIAL selected)
	A1Garden Subcontract Chicago, IL (111) 222-3333	★★★★☆ 3 Reviews	
Α	CA-CENT CA-EAST USP	NE USNW US	average rating
	Access Engineering		
	Chicago, IL (888) 555-1655	3 Reviews	number of reviews
	USNE YRT	RES-HI RES-MID	Territories active in
			applicable Market Sector
	Asr Architectural Desig Orlando, FL (407) 555-6540	6 Reviews	
Α	CA-CENT USNE USSE	USSW	
	Axis Technologies Chicago, IL 323-258-3852	★★★☆☆ 7 Reviews	
A			
	COMMERCIAL MFG		
	Frugger Technology	******	
	Chicago, IL 323-555-6843	1 Reviews	

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:

Search 🛛 д In	nsert л Delete 🖕 Previous 🌩 Next 💩 Workflows 🛛 🗢 🔒 Report Options 🖙 🔛 Import 🖉 Attachments (11) 🗐 Notes 🖓 ECM Documents 🗌	-
Business Pa	artner Code A1GARDEN A1GARDEN Subcontractor Vendor	
usiness Partner	r OM Classification Market Sector CSI Address Classifiers Territory Bank Company Company Type	
View 👻 🝸	🜇 Freeze 🖀 Detach 🛛 Search 🖶 Insert 📲 Insert Multiple 👼 Delete 👒 Workflows 💌 🖨 Report Options 🔍 🛒 Export	>
* Code	* Name	
CA-CENT	Central Canada	
CA-EAST	Eastern Canada	
CA-WEST	Western Canada	
USNE	US North Eastern	
USNW	US North Western	
USSE	US South East	
	US South Western	
USSW		

### 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 <u>Mobile Settings – iOS</u> 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**

No SIM 🗢 12:52			12:52 PM	1	@ * 8	37% 💷 🗲
A1 Cement Industries.						
***	🛨 🗘 3 Re	eviews				_
MISSISSAUGA, ON			tap to select Subcontract			
Evaluation for Select Contract -						
	Save D	raft		S	Submit	
Quality	Experience	Teamwork	Safety	Schedule	Communic	Financial
	Please	e select a	contract	t for eval	uation.	

To enter a review, tap the Add icon  $\textcircled{\bullet}$  to display the above screen. Then tap Select Contract  $\checkmark$  to display the following screen to select the Subcontract to be reviewed.

	No SIM 🗢	12:55 PM	🕑 💲 87% 💳 🗲	
	Cancel	Contracts	Done	
	Q Search			
Project	Open		Closed	tab for closed Subcontracts
(gray background)	Freshmart - Dundas	s Grocery Store (Spring	g 2016)	
	(FRSHMRT-A1C	EMENT6)		
Subcontracts	(FRSHMRT-A1C	EMENT7)		
	Outdoor Stairs (Y	R0031-CEMENT)		
	Outdoor stairs (F	RSHMRT-A1CEMEN	IT)	
	Freshmart - Orange	eville Grocery Store (Fa	all 2015)	
	(YR0032)			
	testing (FRSHMF	RT2233)		
	Freshmart Office B	uilding - Chicago II		
	Building's Founda	ation (P44-A1CEMEN	JT-001)	

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:

No SIM 🗢	1:35 PM	🖲 🖇 91% 💷 🗲			
<b>&lt;</b> A1	Cement Industrie	es.			
★★★★☆ 3 Review MISSISSAUGA, ON	NS				
Evaluation for Concreate Parkling Luilding - Chicago II) -					
Save Draft		Submit			
Quality Experience Tear	T Safety Schedul	e Communic Financial			
Quality					
Has the company managed to complete most project work within the allotted schedules?					
Comments for trade	e's Quality				
	Next				

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 <u>Unsubmitted Reviews</u> screen:



### **Ratings Calculations**



As shown above, there are 4 types of ratings for subcontractors and vendors. These ratings are all <u>weighted</u> <u>averages</u>, 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 <u>not</u> 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 × Weight
Quality	1	5	1 x 5 = <b>5</b>	<b>3.5</b> stars	3.5 x 1 = <b>3.5</b>
Experience	0.5	5	0.5 x 5 = <b>2.5</b>	2 stars	0.5 x 2 = <b>1</b>
Teamwork	2	5	2 x 5 = <b>10</b>	4 stars	2 x 4 = <b>8</b>
		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:  $5 \times 0.714 \approx 3.6$  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:

Subcontractor Rati	ng (	Juestionnaire		Save	Cancel	12 🗈 🍙
🕸 🗉 🗉 🛛 Prequalification Management		Subcontractor Rating Questionnaire Setup				
Search	Display Order	Category	Weight	Start Scale	End Scale	Action
Project: Freshmart Office Building - Chicago		Quality	3			<b>+×</b>
Subcontractors		Experience	1			<b>+ ×</b>
Applicants		Teamwork	1			<b>+×</b>
Self Service     Subcontractor Rating Setup		Financial	1.5			<b>+</b> ×
Subcontractor Rating Questionnaire Setup		Schedule	2			<b>+</b> ×
Prequalfications Control		Communication	2			<b>+ ×</b>
Workflow Notification     Document Management		Safety	2			+×
Maintenance						+
E 🔁 Security		Questions for Communication Category				
E Contractor Reviews	Display Order	Question	We	ight	Allow N/A	Action
		How clear was their communication?		1		<b>+</b> ×
		How timely were their responses to questions and requests?		2		<b>+ ×</b>
						+

## **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:

Prequalification Management		Subcontractor Rating Questionnaire Setup				
arch Go	Display Order	Category	Weight	Start Scale	End Scale	Action
Project: Freshmart Office Building - Chicago		Quality	3			+×
Subcontractors		Experience	1			+×
Applicants		Teamwork	1			+×
Self Service Subcontractor Rating Setup		Financial	1.5			+ ×
Subcontractor Rating Questionnaire Setup		Schedule	2			<b>+ ×</b>
Prequalfications Control     Workflow Notification		Communication	2			<b>+ x</b>
Worknow Notification     Document Management		Safety	2			+×
Haintenance						+
🗄 🧰 Security		Questions for Communication Category				
Subcontractor Reviews	Display Order	Question	We	eight	Allow N/A	Action
		How clear was their communication?		1		+ ×
		How timely were their responses to questions and requests?		2		+ ×
						+

## **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 Roles				Add PM Role	Save Cancel	
CMiC Field Menu		Project Roles				
arch Go	Role	Description	Admin Req.	Key Player	Order Seq.	Eval Weight
Project: New Kaiser Auditorium (T&M) (1000 i: Dommunication Management	I) ARCHITECT	Architect			3	3
Document Management	BID	Bidder				
Contractor Prequalification     Bid Management	BUSDEV	Salesman	✓		6	
Budget & Cost Management     Site Management	СМ	Construction Mgr			3	2
E Peports	CUSTOMER	Customer			10	
⊞- 🛄 User-Defined Logs ⊞- 🛄 File Maintenance	ENGINEER	Engineer			3	
Security     Partners	EQUIPSUPP	Equipment Supplier			21	
Contacts	ERECT	Erector			110	
Convert Partners and Contacts     User Maintenance		Update Role CM				
Change User LDAP Server     Role Maintenance	View/Create/Update/Delete All C	Objects View/Create/Update/Delete All Document Types M	obile Springboard O	/bjects 🗌 Defa	ult Email Notifica	ation Settings
User Access	Restricted View All for RFIs					
Project Roles     License Pools	Send/Receive Receive Owner Change Order	Receive Partner F	RFI			
	Send Partner RFI	Eorward REI				

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:

Subcontractor Rati	ng(	Questionnaire		Save	Cancel	12 🗈 🕯					
Prequalification Management		Subcontractor Rating Questionnaire Setup									
arch Go	Display Order	Category	Weight	Start Scale	End Scale	Action					
Project: Freshmart Office Building - Chicago		Quality		3		<b>+</b> ×					
Subcontractors		Experience	[	1		+×					
Applicants		Teamwork		1		<b>+</b> ×					
Self Service     Subcontractor Rating Setup		Financial	1	.5		<b>+</b> ×					
Subcontractor Rating Questionnaire Setup		Schedule	-	2		+×					
Prequalfications Control		Communication		2		+×					
Workflow Notification     Document Management		Safety		2		+×					
Maintenance						+					
E Gecurity		Questions for Communication Category									
Subcontractor Reviews	Display Order	Question		Weight	Allow N/A	Action					
		How clear was their communication?		1		+×					
		How timely were their responses to questions and requests?		2		<b>+</b> ×					
						+					

## **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.

Prequalification Management						Review	Modera	ation						
Go	41	Review ID	Subcontractor	Reviewer	Review Status	Overall	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial	Completed Date
Project: Freshmart Office Building - Chicago	•	0000034	Eagle Investments Company	Glenda Stimpson	PRIVATE	1.7	0	0	0	0	0	0	0	
	•	80000008	ASR Architectural Design Group	Data Admin	PRIVATE	3	0	0	0	0	0	0	0	
Self Service     Subcontractor Rating Setup	•	0000033	Veritas Incorporated	Glenda Stimpson	RETURN	-1	0	0	0	0	0	0	0	
- Subcontractor Rating Questionnaire Setup	•	00000014	Gladstone Design/Build	Amanda Matthews		3	0	0	0	0	0	0	0	
Prequalfications Control     Workflow Notification	•	0000042	Parkdale Holdings	Glenda Stimpson		3	0	0	0	0	0	0	0	
Document Management     Maintenance	•	0000030	Gladstone Design/Build	Glenda Stimpson		2	0	0	0	0	0	0	0	
E Security	•	0000029	Gladstone Design/Build	Glenda Stimpson		0.5	0	0	0	0	0	0	0	
Subcontractor Reviews     Review Moderation	•	00000005	ABS Contractors Ltd	Data Admin		0	0	0	0	0	0	0	0	
Subcontractors	4	0000027	Gladstone Design/Build	Glenda Stimpson		-1	0	0	0	0	0	0	0	
	•	00000020	Eagle Investments Company	Glenda Stimpson		2.8	0	0	0	0	0	0	0	
	4	00000046	Aetna Insurance	Data Admin		0	0	0	0	0	0	0	0	
	4	00000035	Crafty Manufacturing Company Ltd.	Glenda Stimpson		5.2	0	0	0	0	0	0	0	

## 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

10:20 AM Fri Aug 30		<b>?</b> 50% 🔳 🤊
Settings	CMiC Subcontractor Ratings	
Books	ALLOW CMIC SUBCONTRACTOR RATINGS TO ACCESS	
Podcasts	Siri & Search	>
Same Center	Siri & Suggestions	
	CMIC SUBCONTRACTOR RATINGS SETTINGS	
CMiC Approvals	App Version	1.0.8
CMiC Mobile Crew Time	LOGIN SETTINGS	
CMiC Mobile Field	Auto Login	
CMiC Pay Stub	SERVER CONFIGURATION	
CMiC Subcontractor Ratings	Public Cloud (URL not needed)	$\bigcirc$
CMiC Time Tracker	Server URL Https://v10xsandboxmobile.cmicglobal.com/cmicprod	
6 FortiToken	PROXY SETTINGS	
G Google	Enable Proxy	$\bigcirc$
🙆 Learn Java	Username	
OneDrive	Password	
LestFlight	USER SETTINGS	
Zoom	Show User	
		-

After installing the Subcontractor Ratings app, go to the Settings screen is 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**

🖘 🗄 Prequalification Management												
arch Go	Display Order	Category	Weight	Start Scale	End Scale	Action						
Project: Freshmart Office Building - Chicac		Quality	3			+×						
- Subcontractors		Experience	1			+×						
- Applicants		Teamwork	1			+×						
Self Service     Subcontractor Rating Setup		Financial	1.5			+×						
		Schedule	2			+×						
Prequalifications Control		Communication	2			<b>+ x</b>						
		Safety	2			+×						
Maintenance						+						
E Security		Questions for Communication Category										
Subcontractor Reviews     Contractor Reviews	Display Order	Question	We	ight	Allow N/A	Action						
Subcontractors		How timely were their responses to questions and requests?		100		+×						
		How clear was their communication?		100		+×						
						+						

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):

CMiC Field Menu						Re	view Mo	oderation						
aarch Go	••	Review ID	Subcontractor	Reviewer	Review Status	Overall	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financia	Completed Date
Project: Freshmart Office Building - Chicago II (P448957)     Ommunication Management	◀	00000089	A1 CEMENT INDUSTRIES.	Mike Fernandes	DRAFT	3.5	0	0	0	0	0	0	0	03/20/2018
Communication Management     Document Management	•	00000088	A1 CEMENT INDUSTRIES.	Mike Fernandes	SUBMITTED	4.5	0	0	0	0	0	0	0	03/20/2018
Bubcontractor Prequalification         Budget & Cost Management         Bud	•	0000087	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	3.2	0	0	0	0	0	0	0	03/16/2018
	•	00000086	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	2.7	0	0	0	0	0	0	o	03/16/2018
	•	0000085	A1 Bricks Manufacturing Company	Anand Badinger	SUBMITTED	3.3	0	0	0	0	0	0	o	03/16/2018
	•	00000084	Frugger Technology	Anand Badinger	DRAFT	2.6	0	0	0	0	0	0	0	03/15/2018
	4	0000083	A1MARBLE	Anand Badinger	SUBMITTED	3.9	0	0	0	0	0	0	0	03/15/2018
	4	00000082	A1 Mechanical Services	Anand Badinger	SUBMITTED	3.6	0	0	0	0	0	0	0	03/14/2018
		00000081	A1 Masons	Anand Badinger	SUBMITTED	4.6	0	0	0	0	0	0	0	03/14/2018

## Subcontractor Prequalification – JSP

CMiC			
DEVELOPMENT TOO	DLS	SOFTWARE V10	
CHOOSE A TOOL:	CHOOSE AN ENVIRONMENT:	CHOOSE A PRODUCT:	CHOOSE AN ENVIRONMENT:
• Treeview Builder	• testv10x	Enterprise Console	• testv10x
• Query Builder	• pretestv10x	Enterprise Classic	• pretestv10x
Process Builder		Classic without treeview	
Workflow Monitor		Project Management	
<ul> <li>Form Letter Definition</li> </ul>		• Timesheet Entry	
<ul> <li>Jasper Server / Analytics</li> </ul>		HR Self-Service	
<ul> <li>Program Builder</li> </ul>		Opportunity Management	
Simple Menu		Subcontractor Prequalification	
Report Parameters			-
Oracle Report Queue			
Server Logs			
Latest Server Log			
Catalog Builder			
Dashboard Builder			
	RUN DevTools »		RUN Software »
			Logout

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

Subcontractor Ratir	ng Qu	Jestionnaire
Prequalification Management Search     Go     Project: Freshmart Office Building - Chicag     Subcontractors     Applicants     Self Service     Subcontractor Rating Setup     Prequalifications Control     Workflow Notification     E Document Management	Display Order	Quality Experience Teamwork Financial Schedule Communication Safety
Maintenance     Maintenance     Subcontractor Reviews     Review Moderation     Subcontractors	Display Order 16 17	

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:

Prequalification Management	HCM_ADMIN HR Administrator	N	🛯 🗙	Choose your action 💌	
h Go	HRMARJROLE MARJ HRADMIN	Y	🛯 🗙	Choose your action 💌	
	IHCOLPRJ IHCOLLP	Y	🛯 🗙	Choose your action 💌	
Project: Freshmart Office Building - Chicago	IHMASTER Irina's Role	Y	🛯 🗙	Choose your action 💌	
Subcontractors	JDROLE JDROLE	Y	🛯 🗙	Choose your action 🗸	
	JSP-TIME JSP Time Sheets	N	🖄 🗙	Choose your action 🗸	
	LG_MASTER LG_Master	Y	😒 🗙	Choose your action 🗸	
Subcontractor Rating Questionnaire Setup	LINGSROLE Ling Shi - QA Rol	Y	S 🗙	Choose your action 🗸	
Prequalifications Control	LUDMILA Ludmila's Role	Y		Choose your action 🗸	
Workflow Notification     Document Management	MIKEPMJSP MIKE PMJSP Rol	Y	S X	Choose your action	
Maintenance	MISTY-JSP Misty's JSP Secu	ty Role Y	S X	Assign Users Assign Programs	
C Security	MRROLE Madhuri Role	Y	S X	Assign Menu Items	
User Maintenance	MRTESTPMRO MR TEST PM RC	E N	S X	Assign Privileges Assign Field Security	
Role Maintenance	NAVCOLLAB navcollabrator	N	S X	Choose your action V	
Subcontractor Reviews	NAVMASTER navmaster	Y		Choose your action 🗸	
Carlo Review Moderation	NEWROLE new role	N		Choose your action 🗸	
Subcontractors	NLROLE Novi Test Role	Y		Choose your action 🗸	
	OM ADMIN OM Administratio	N		Choose your action V	
	PM_ADMIN PM Administration			Choose your action V	

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

Prequalification Mana	gement 🛛 🖓 🖬		
¢ ∃ ⊞ Prequalification Management	Add/Remove menu items from the EVERYTHING Role	om the EVERYTHING Role	Add/Remove menu items from t
Search Construction Relations of the Building - Chicag Applicants Subcontractors Service Subcontractor Raing Setup Subcontractor Raing Setup Prequalifications Control Orchwork Violification Bio Sociument Management Bio Salament Management Bio Salament Management Bio Salament Setup Security Subcontractor Raing Setup Subcontractors Setup Subcontractors Setup Subcontractors	Meru Itam     Grantadi       Subcontractora     Image: All Update 1       Subcontractora     Image: All Update 1       Applicants     Image: All Update 1       Subcontractor Rating Setup     Image: All Update 1       Document National Control     Image: All Update 1       Document Researce     Image: All Update 1       Subcontractor Rating Setup     Image: All Update 1       User Mathemance     Image: All Update 1       User Ancess     Image: All Update 1       Subcontractor Reviews     Image: All Update 1       Review Moderation     Image: All Update 1       Subcontractor Reviews     Image: All Update 1       Subcontractor Reviews     Image: All Update 1       Subcontractor Reviews     Image: All Update 1	V       V	Subcontractors Applicants Self Service Subcontractor Rating Setup Subcontractor Rating Setup Subcontractor Rating Setup Subcontractor Rating Subcontractor Horegalia/Second Rating Setup Work frow Notification Document Management Documents Documents Documents Documents Documents Documents Subcontractor User Mantenance User Mantenance User Mantenance Subcontractor Reviews Review Moderation

## Subcontractor Rating Questionnaire Setup

Prequalification Management			Subcontractor Rating Questionnaire Setup					
arch Go	Display Order		Category	w	/eight	Start Scale	End Scale	Action
Project: Freshmart Office Building - Chicac		Quality			3			+×
Subcontractors		Experience			1			+×
Applicants		Teamwork			1			+×
Self Service Subcontractor Rating Setup		Financial			1.5			+×
Subcontractor Rating Questionnaire Setup		Schedule			2			+×
Prequalfications Control		Communication			2			+×
Document Management		Safety			2			+×
Maintenance		Rating Questions for						+
Security		Rating Category	Questions for Safety Category					
Role Maintenance	Display Order	Rating Category	Question		Wei	ight	Allow N/A	Action
User Access	9	Had either a state or the federal Environment Protection Ag	ency (EPA) issue a Notice of Violation (NoV) and/or assess penalties against your firm?			1		+×
Subcontractor Reviews	10	Had a period when your firm had employees without worker	s compensation insurance or state approved self-insurance?			0.5		+×
Subcontractors	20 Had either a state or the federal occupational Safety and Health Administration Cite serious violations and assess penalties against your firm?					2		+×
	-	P / /			-10-			+

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.

CMiC Field Menu		_					Re	view Mo	deration						
earch Go			Review ID	Subcontractor	Reviewer	Review Status	Overall	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial	Completed Date
Project: Freshmart Office Building - Chicago II (P448957)	•		00000089	A1 CEMENT INDUSTRIES.	Mike Fernandes	DRAFT	3.5	0	0	0	0	0	0	0	03/20/2018
Communication Management     Document Management	•		00000088	A1 CEMENT INDUSTRIES.	Mike Fernandes	SUBMITTED	4.5	0	0	0	0	0	0	0	03/20/2018
Subcontractor Prequalification     Define Bid Management     Define Cost Management	4		0000087	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	3.2	0	o	0	0	0	0	0	03/16/2018
Site Management     Cost management     Cost management	•		0000086	A1 Bricks Manufacturing Company	Mike Fernandes	SUBMITTED	2.7	0	0	0	0	0	0	0	03/16/2018
User-Defined Logs	4		0000085	A1 Bricks Manufacturing Company	Anand Badinger	SUBMITTED	3.3	0	o	0	0	0	0	0	03/16/2018
E C Subcontractor Reviews	4		00000084	Frugger Technology	Anand Badinger	DRAFT	2.6	0	0	0	0	0	0	0	03/15/2018
Review Moderation     Subcontractors	•		0000083	A1MARBLE	Anand Badinger	SUBMITTED	3.9	0	0	0	0	0	0	0	03/15/2018
	•		00000082	A1 Mechanical Services	Anand Badinger	SUBMITTED	3.6	0	0	0	0	0	0	0	03/14/2018
	4		00000081	A1 Masons	Anand Badinger	SUBMITTED	4.6	0	0	0	0	0	0	0	03/14/2018

## 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:

CMiC Field Menu	FAR_MASTER	HR Master (JSP)	Y	🛯 🗙	Choose your action 🔽	
Go	HCM_ADMIN	HR Administrator	N		Choose your action 🗸	
	HRMARJROLE	MARJ HRADMIN	Y	🖉 🗙	Choose your action 🔽	
Project: Freshmart Office Building - Chicago II (P448957)	IHCOLPRJ	IHCOLLP	Y	🖾 🗙	Choose your action 💌	
Communication Management	IHMASTER	Irina's Role	Y	🛯 🗙	Choose your action 🔽	
Subcontractor Pregualification	JDROLE	JDROLE	Y	🛯 🗙	Choose your action 🔽	
Bid Management	JSP-TIME	JSP Time Sheets	N	🛯 🗙	Choose your action 🔽	
Budget & Cost Management	LG_MASTER	LG_Master	Y	🛯 🗙	Choose your action 🔽	
Site Management	LINGSROLE	Ling Shi - QA Role	Y	😒 🗙	Choose your action 🗸	
Reports User-Defined Logs	LUDMILA	Ludmila's Role	Y	🛯 🗙	Choose your action 🗸	
File Maintenance	MIKEPMJSP	MIKE PMJSP Role	Y	🛯 🗙	Choose your action	
Security	MISTY-JSP	Misty's JSP Security Role	Y	😒 🗙	Assign Users Assign Programs	
Partners	MRROLE	Madhuri Role	Y	🛯 🗙		
Contacts     Convert/Merge Partners and Contacts	MRTESTPMRO	MR TEST PM ROLE	N	Si 🗙	Assign Privileges Assign Field Security	
	NAVCOLLAB	navcollabrator	N	SI X	Choose your action V	
Convert/Merge Partners and Contacts     User Maintenance     Change User LDAP Server     Role Maintenance     User Access	NAVMASTER	navmaster	Y		Choose your action 🗸	
Role Maintenance	NEWROLE	new role	N		Choose your action 🗸	
User Access	NLROLE	Novi Test Role	Y		Choose your action 🗸	
License Pools	OM ADMIN	OM Administration	N		Choose your action 🗸	
Subcontractor Reviews	PM ADMIN	PM Administration	Y		Choose your action 🗸	
Review Moderation	QATESTER1	QATESTER1	Y		Choose your action V	
Subcontractors	RAJ1ROLE	Raj1role	Ý		Choose your action V	
	RAJMASTER	Rai's role	~		Choose your action V	

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

CMIC FIELD			1
CMiC Field Menu	RTI Maintenance		
rch Go	RTI Mapping	$\checkmark$	
	RTI Error Log		
Project: Freshmart Office Building - Chicago II (P448957)	RTI Log		
Document Management	File Upload	<b>V</b>	
Subcontractor Prequalification	Auto Cold Storage		
Bid Management	Job Scheduler		
Budget & Cost Management Site Management	Security		
Reports			
User-Defined Logs	Partners		
Dile Maintenance	Contacts	$\checkmark$	
Construction Security	Convert/Merge Partners and Contacts	✓	
Contacts	User Maintenance	✓	
Convert/Merge Partners and Contacts	Change User LDAP Server		
User Maintenance	Role Maintenance		
Change User LDAP Server	User Access	<b>V</b>	
User Access	Project Roles		
Project Roles	License Pools		
License Pools			
Subcontractor Reviews	Subcontractor Reviews		
Review Moderation     Subcontractors	Review Moderation		
Subcontractors	Subcontractors		

## 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.

PM Roles				Add PM Role	Save Cancel	12 0	o 6
t 🗉 🗉 CMiC Field Menu		Project Roles					
iearch Go	Role	Description	Admin Req.	Key Player	Order Seq.	Eval Weight	۸Í
Project: New Kaiser Auditorium (T&M) (10001)	ARCHITECT	Architect			3		
Communication Management     Document Management	BID	Bidder					
Contractor Prequalification     Bid Management	BUSDEV	Salesman			6		
Budget & Cost Management     Site Management	СМ	Construction Mgr			3		
Reports	CUSTOMER	Customer			10		1
User-Defined Logs     Difference     Difference	ENGINEER	Engineer			3		
Security     Partners	EQUIPSUPP	Equipment Supplier			21		
	ERECT	Erector			110		~
Convert Partners and Contacts      User Maintenance		Update Role CM					
Change User LDAP Server	View/Create/Update/Delete All Ot	ojects View/Create/Update/Delete All Document Types Mob	ile Springboard O	bjects 🗌 Defa	ult Email Notific	ation Settin	igs.
User Access	Restricted View All for RFIs						
Cole Maintenance     User Access     Project Roles     License Pools	Send/Receive Receive Owner Change Order	Receive Partner RFI					
	Send Partner RFI	Forward RFI					

## **Review Moderation** – Screen

Prequalification Management					Re	view Moder	ation							
rch Go	◀ 🗆	Review ID	Subcontractor	Reviewer	Review Status	Overal Q	Quality	Experience	Teamwork	Safety	Schedule	Communication	Financial	Completed Date
	- □	0000034	Eagle Investments Company	Glenda bb Stimpson	PRIVATE	1.7	0	0	0	0	0	0	0	
Project: Freshmart Office Building - Chicage Subcontractors	◀ 🗆	80000008	ASR Architectural Design Group	Data Admin	PRIVATE	3	0	0	0	0	0	0	0	
- Applicants	↓ □	0000033	Veritas Incorporated	Glenda bb Stimpson	RETURN	-1	0	0	0	0	0	0	0	
	▲ □					0	0	0	0	0	0	0	0	
Subcontractor Rating Setup     Subcontractor Rating Questionnaire Setup	- □	00000042	Parkdale Holdings	Glenda bb Stimpson		3	0	0	0	0	0	0	0	
Pregualfications Control	◀ □	0000030	Gladstone Design/Build	Glenda bb Stimpson		2	0	0	0	0	0	0	0	
- Workflow Notification	▲ □	0000029	Gladstone Design/Build	Glenda bb Stimpson		0.5	0	0	0	0	0	0	0	
Document Management	▲ □	00000005	ABS Contractors Ltd	Data Admin		0	0	0	0	0	0	0	0	
E 🗀 Maintenance E 🧀 Security	▲ □	00000027	Gladstone Design/Build	Glenda bb Stimpson		-1	0	0	0	0	0	0	0	
Contractor Reviews	▲ □	00000020	Eagle Investments Company	Glenda bb Stimpson		2.8	0	0	0	0	0	0	0	
Review Moderation	- □	0000035	Crafty Manufacturing Company Ltd.	Glenda bb Stimpson		5.2	0	0	0	0	0	0	0	
Subcontractors	▲ □	0000036	Crafty Manufacturing Company Ltd.	Glenda bb Stimpson		5.5	0	0	0	0	0	0	0	
	▲ □	00000046	Aetna Insurance	Data Admin		0	0	0	0	0	0	0	0	
	◀ □	0000043	AXIS Technologies	Glenda bb Stimpson		7	0	0	0	0	0	0	0	
	1 E	0000032	Veritas Incorporated	Glenda bb Stimpson	RETURN	4	0	0	0	0	0	0	0	
		00000014	Gladstone Design/Build	Amanda Matthews		3	0	0	0	0	0	0	0	

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

Prequalification Management				Subco	ntractors							
arch Go	Subcontractor ID	Subcontractor Name	#Reviews	Overal 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.
Project: Freshmart Office Building - Chi	A1CEMENT	A1 CEMENT INDUSTRIESBP NAME	2	4.5	18	5	5	4	5	3.5	4.3	
Subcontractors     Applicants	A1FLOOR	A1 FLOOR MAKER BP Name	1	3.2	27	2.5	4.5	1.5	4	3	2	1
Self Service	A1GARDEN	A1GARDEN Subcontractor Vendor	5	4.2	19	4.5	4	4.2	4.7	3.3	4.3	4.
Subcontractor Rating Setup	A1MARBLE	A1MARBLE	1	3.9	20	2.5	4	4.5	4	4	4.3	3.
Subcontractor Rating Questionnaire Setu	A1MASONS	A1 Masons	2	4.6	17	4.8	4	4.8	4.9	4.3	4.4	4.1
Prequalfications Control Workflow Notification	A1MECH	A1 Mechanical Services	1	3.6	22	3	4	3	4.5	3.5	3.3	4.
E Document Management	A1STEEL	A1 Steel Mill	1	3.5	24	4	4.5	4.5	3.5	3.5	3.5	i 0.i
🗄 🦲 Maintenance	ABSCONT	ABS Contractors Ltd	2		1							
🗄 🛄 Security	ACCESSEN	Access Engineering	3	3.6	22	3.5	2.7	4	4.2	3.5	3.1	4.
E Constructor Reviews	AETNA	Aetna Insurance	1		1							
Review Moderation     Subcontractors	ASR	ASR Architectural Design Group	11	3.3	25	3.8	3.3	2.3	4.2	2.1	3.1	4.1
	AXIS	AXIS Technologies	10	3.2	27	2.4	2.8	2.3	3.8	3.2	3.1	

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 <a href="http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole? adf.ctrl-state=yrbefigvb\_6">http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole? adf.ctrl-state=yrbefigvb\_6</a>, then for Mobile Approvals they will use <a href="http://test4v10.cmic.ca:7785/cmictestv10x/">http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole?</a>.

#### 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].





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**

31 PM	🗢 🕇 100% 🎫		1:32 PM		হু 100গ
CMiC Approvals da 🔫			CMiC Approval	s da 🔻	
A APPROVALS (1) FI			Approvals 6	FYI 1550	
Q Search 🛱			Q Search	***	
Friday, July 5, 2019			Friday, July 5, 201	9	
P Location Code Import Location Code Import Template has been uploaded .			F New ATTACHMENT (000000386) Sample Location Code Import Template has been uploaded .	Unread	
New MEDIA (MEDDKCPR0J0005) SendToCMfC_qa2V12_V12- 008-2_prodr12 has been uploaded .		-	F SendToCMiC_qa2v12_V 008-2_prodr12 has been uploaded .		The FYI messages are displayed
New MEDIA (MEDDKCPR0J0006) copy_job_structure_messa uploaded .	No notification selected.		F copy_job_structure_met ge_fixed has been uploaded .	sa Unread	No notification selected.
New MEDIA (MEDDKCPR0J0007) copy_job_structure_messa uploaded .			F copy_job_structure_met ge_fixed has been uploaded .	sa Unread	
New ATTACHMENT (000000384) copy_job_structure_messa Unread ge_fixed has been uploaded .			F copy_job_structure_mes ge_fixed has been uploaded .	sa Unread	
F New ATTACHMENT Unread			New ATTACHMENT (000000385) Sample Location Code Import	Unread	
F New ATTACHMENT (000000378) SC320(rfp) Unread has been uploaded .			Template has been uploaded .	Gilleau	

## Filter List by Date Range



#### Filter List by Status

пом СМіС Approvals da <del>-</del>	🗢 🖌 2005 (188)	1:33 PM + 100% 3 CMiC Approvals da +	±29 PM Č CMiC Approvals da ♥	♥ 1001
Approvals () () FM ()		Approvals ( Pri ( )	APPROVALS () () FYI ()	
Friday, July 5, 2019		Jev01/19 to Ju/05/19	Approve Close	
COODOUSSE) Sample     Location Code Import     Templete has been     uploaded .		Reassign 🔗 Reject	Reassign 🔗 Reject 🧭	
New MEDIA (MEDIXCR0J00001) (MEDIXCR0J0001) 005-7_prov12 has been uploaded .		Tap the checkmark next spinded: Tap the checkmark next to the desired statuses	Read         Ourcead         Ourcead           New MEDIA (MEDDRCF0.30008)         (MEDDRCF0.30008)         (MEDDRCF0.30008)           GeneralCALIC.gst712.x12         Unread         Unread           URDRCF12.bss been upforeded.         Unread         Unread	Filters are set to show FYIs with a status of "Unread"
New MEDIA (MEDXXFPR0.0000) op.job.structure_messa ge.fund has been uploaded.	No notification selected.	New MEDA (P) organization memory and thread (p) characterization memory and thread	Mere MEDIA (MEDDRCPR0.0006) (MEDDRCPR0.0006) ge_fined has been upbraded.         Unerad	No notification selected.
New MEDIA (MEDDKGPR0.0007) copy.job.structure.messa ge.fixed has been uploaded .		New MEDA (T) optimizatione_mesa United poliatione_mesa United optimetral	New MEDIA (MEDDISCPR0.0007) (MEDDISCPR0.0007) ge_fund has been sphaaded.	
New ATTACHMENT (000000384) copy_job_structure_messa Unread ge_fund has been uploaded.		New ATXCHMB1T () copy jak, success, mesa volume to the second s	New ATTACHBENT (000000384) ge_(med has been uploaded .	
New ATTACHMENT Unvead		New ATTACHMENT (00000035) Sample Lonation Code Import Template has been	New ATTACHMENT (000000385) Sample Location Code Import Template has been	
New ATTACHMENT (000000378) SC320(rfp) tus been uploaded		uploaded -	uploaded .	

## Searches

131 рм СMiC Approvals da <del>т</del>	🗢 4 100% 📷	9:45 AM	P 975 💻	9:46 AM CMiC Approvals da ▼	
Approvals () (F) FYI ()		APPROVALS (3 FYI (55)) Q. Search # X		APPROVALS D FYI III	
Fridary, July 5, 2019      New ATSACHAENT     (00000038) Sample     Location Code import     Unread     unabledia		Friday, July 5, 2019 New ATACHMENT (00000038) Sample Location Code Import Unread Template has been uploaded.		Friday, July 5, 2019 New ATTACHMENT (000000560) First Boot- Unread June 18 has been usloaded.	
New M2DA     MotorCPH0.0005     SenfocMc.gaV12, V12-     Unvead     obj2_prodr12 has been     upladed		New MEDIA (MEDOKCPROJ0005) SendToCMIC_q2xV12_V12- Unread uploaded .		Prev ATTACHMENT     Provide Control (Control (Contro) (Control (Contro) (Contro) (Contro) (Contro	
New MEDIA (MEDOKCPR0,J0006) (009,Joh,structure_messa uploaded . No	notification selected.	New MEDIA (MEDDKCPR0.0006) (performation of the second ge_fixed has been uploaded .	No notification selected.	New ATTACHMENT     O000000582 2nd Floor     Board Room Map has been     uploaded.     New ATTACHMENT	No notification selected.
Here MEDUA.           (#EDUACCPR0.00007)           copy_jdo_structure_messa         Unread           qe_Mosh has been uploaded .         Unread		New MEDIA (MEDDIACCPR0.00007) copy.job.structure.messa ge.fixed has been imbasted		(000000563) 3rd Floor Board Room Maps has been uploaded . Hordens burg 32, 2010	
New ATT&CHMENT (000000384)         (copy.jab.structure_messa         Unread ge_fixed has been uploaded.			YUIOP GHJK	0 4 5 5	s o 7 o o p s y u i o p s g h i k l Search
New ATTACHMENT Unread		A S D F			g h j k l Search v b n m ; ? &
F New ATTACHMENT (000000378) SC320(rfp) Unread has been uploaded .		.7123	.7123	.7123 🙄 🦺	.7123

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 ( $\bigcirc$  Search is displayed):



## **Refresh, Drop-Down Menu & Indicators**



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**

	10:44 A	M CMiC Approvals	da 🔻	== ;	7 🔽	•	奈 54% ■⊃	Tap to approve the
Click to expand the Approval details to fit the entire screen	а А Q s	PPROVALS (1) F) F	1075	in the amo	prove Registere ount of \$10,000. ies and Job AN,	00 for vendo		Opens files attache to the current
Refresh the screen		Friday, July 12, 27, 3 Please oprove Registered nee SUSREG89 in the		Comments				request (this icon will only display if attachments exist)
(Expands/collapses the informational section at the lower		amount of \$10,000.00 for vendor AXIS Technologies and Job ANALYZE	Read	∧ Invoice	e Header			Tap to re-assign the current request
part of the page		Wednesday, June 5, 2019		Company	Sus - Sb Urban Systems	Vendor	Axis - Axis Technologies	current request
		This contract has no schedule of values (SOV). Please Approve subcontract		Registratio n Group	Susgrp - Sb Us Registration Group	Invoice Series	Suin - Sb Us Invoice Series	Tap to reject the current request
(		SSCSUBCONT-03, change 000 for Vendor. (SSVEND01) S S	Unread	Invoice Number	Susreg89	Invoice Date	12-Jul-19	
		constructions ltd and Job: (SSCSSC1201) SSCSSC1201		Amount On Invoice	10,000.00	Tax 1 Taxable Amount	3,500.00	
		Monday, August 20, 2018		Tax 1 Amount	227.50	Tax 2 Taxable Amount	0.00	
	<b>A</b>	Please Approve Registered Invoice DFHJ in the amount of \$112.00 for vendor Balraj vendor 1	Unread	Tax 2 Amount	650.00	Tax 3 Taxable Amount	0.00	
		Please Approve Registered Invoice 155 in the amount of \$21.00 for vendor Wal-	Unread	Tax 3 Amount	650.00	Po Number		
		Mart Stores Inc						

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 reassigned to another user:

10:48 A	м				🗢 91% 🔲		8:50 A/	A			奈 86% 🔲
C	CMiC Approvals	da 🔫	<b># 2</b> 2	📭 🦰	🍐 📩 Approve		C	CMiC Appro	ovals	da 🔻	K Reassign
	PPROVALS d	/I 1551 ≇	This contract has no so Please Approve subcon change 000 for Vendor.	ract SSCSUE			_	PPROVALS	F FY	1 1570 #E	This contract has no schedule of values (SOV). Please Approve subcontract SSCSUBCONT-03, change 000 for Vendoc (SSVEND01) S S constructions ltd and Job: (SSCSSC1201) SSCSSC1201
			Comments								Reassign Workflow
	This contract has no schedule of values (SOV). Please Approve subcontract							This contract has n schedule of values Please Approve sub			User Type to search or tap to select from list. Type to search or tap to select from list.
	SSCSUBCONT-03, change 000 for Vendor. (SSVEND01)	Deed	A Subcontract Heade					SSCSUBCONT-03, c 000 for Vendor (SS	hange	Read	Comment re-assigned to
	S S constructions ltd and Job: (SSCSSC1201) SSCSSC1201		Job Sscssc1201 - Sscssc1201	Vendor	Ssvend01 - S S Constructions Ltd			S S constructions It Job: (SSCSSC1201) SSCSSC1201	td and		Please enter a mandatory comment.
				Contract Or	Sscsubcont-03 -						required
	Please Approve PO 781524, release 1 for		Туре	Po Number	Workflow Review	-		Please Approve PO 781524, release 1 fr			
	Vendor: (ZZ-ACME) ZZ- Acme Supply and Job: (ZZ- ANDY) Andy Test Job	Unread	Amount	Contract Date				Vendor: (ZZ-ACME) Acme Supply and J ANDY) Andy Test Je	lob: (ZZ-	Unread	
	Monday, August 20, 2018		Expected Delivery 05-Jun-19 Date	Date Entered	05-Jun-19			Monday, August	20, 2018		
	Please Approve Registered Invoice DFHJ in the amount of \$112.00 for	Unread	✓ Schedule Of Values					Please Approve Reg Invoice DFHJ in the amount of \$112.00	for	Unread	
	vendor Balraj vendor 1		V Compliances					vendor Balraj vendo	or 1		
(A)	Please Approve Registered Invoice 155 in the amount of \$21.00 for vendor Wal- Mart Stores Inc	Unread	Ƴ Audit History				(A)	Please Approve Reg Invoice 155 in the a of \$21.00 for vendo Mart Stores Inc	amount	Unread	

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**

10:56 AM	275 💶 1 10.57 AM 🔶 57% 🔳 -	10:58 AM 🗣 🕇 67% 🔳
Č CMiC Approvals da ▼	Ć CMiC Approvals da ▼	
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Thursday, May 30, 2019	Thursday, May 30, 2019 CMiC Approvals	Monday, August 20, 2018
Please Approve PO 795524, referse 1 for Access Days and Job (C2 XMP) (Wey Test Job	Please Approve PD 71112A referese for Whork (ZZ-AMD) and AMD 22A Anter Budge and AMD 22A CK atom selected. CK	Please Approve Registered  Minore DRV in the menory of struct 20 for unread  Wread No notification selected.
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Please Agrows Registered terrise Its's networks start Store for Mart Store	Please Approve Registered threade 15% the amount of the 15% reveals that what threads that threads the second that t	
✓ Submit	✓ Bdam	

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**

" FL	YSHEET DEFINITION								💾 S	ave 🛛 🕧	♪ (2)	D • C
	Plysheet InvoiceEntry									Show Show	Inactive Fiel	ds
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	* Field	* Column	Кеу Туре	* Data Type	Length	Decimals	Display Order	* Active	Mandatory	Hidden	Update Allowed	Update If Null
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	Completed Amount	COMPLETED_AMOUNT	None ~	Number 🖌				$\checkmark$			$\checkmark$	
•	Contract Amount Q	CONTRACT_AMOUNT Q	None 🗸	Number 🖌								
	ource Default Close	<										2

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 <a href="http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole?\_adf.ctrl-state=yrbefigvb\_6">http://test4v10.cmic.ca:7785/cmictestv10x/UIConsole/faces/task-flow-definition-runNamedConsole/MainConsole?\_adf.ctrl-state=yrbefigvb\_6</a>, then for Mobile Approvals the root URL

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

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 <u>http://test4v10.cmic.ca:7785/cmictestv10x/</u>, 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**

ర	CMiC Approvals	da 🔫	ర	CMiC Approvals	
+ FILTE	R OPTIONS	Q,	+ FI	ILTER OPTIONS	С
A	APPROVALS 4 F FYI 1	578		APPROVALS 4 F FYI 15	84
	Friday, July 12, 2019			Friday, July 12, 2019	
	w ATTACHMENT (000000290) ue_1732113 has been uploaded .	Unread	A	Please Approve Registered Invoice SUSREG89 in the amount of \$10,000.00 for vendor AXIS Technologies and Job ANAIYZE	U
A SU for	ease Approve Registered Invoice ISREG89 in the amount of \$10,000.00 vendor AXIS Technologies and Job	Unread		Wednesday, June 05, 2019 This contract has no schedule of values	
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	Thursday, July 11, 2019				
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## **Display FYI Messages**

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FII	LTER OPTIONS	Q		+ FII	TER O	PTIONS				
(	A APPROVALS 4 F FYI 1	578		(	A AP	PROVA	ALS	4	F FYI	15
	Friday, July 12, 2019					F	riday, J	uly 12, 2	2019	
F	New ATTACHMENT (000000290) issue_1732113 has been uploaded .	Unread		F		TACHME 732113				
A	Please Approve Registered Invoice SUSREG89 in the amount of \$10,000.00 for vendor AXIS Technologies and Job ANALYZE	Unread		F		TACHME ploaded .		0000004	4) Test file h	as
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						$\triangleleft$				

Unread Unread Unread Unread Unread Unread Unread Unread Unread Unread

#### Filter List by Date Range



## Searches

3	CMiC Approvals	da 🔫		5	CMiC Approvals	da 🔫	ర		CMiC App	provals	da 🔫
+ FILTER C	OPTIONS	Q		FILTER	Search	×		LTER FIONS	orl		×
A	PPROVALS 4 F FYI 15	578		A APP	ROVALS 4 FYI	1584				F FYI	21
	Friday, July 12, 2019				Friday, July 12, 2019				Friday, July	05,2019	
	ATTACHMENT (000000290) 1732113 has been uploaded .	Unread	C	New ATTA	ACHMENT (000000290) 32113 has been uploaded .	Unread	F			00360) First <b>floor</b> - ine 18 has been	Unread
SUSR	e Approve Registered Invoice EG89 in the amount of \$10,000.00 ndor AXIS Technologies and Job YZE	Unread	C	SUSREGE	oprove Registered Invoice 9 in the amount of \$10,000 r AXIS Technologies and Job	0.00 Unread	F		HMENT (00000 Room Maps ha	00361) Ground as been uploaded	Unread
	ATTACHMENT (000000004) Test file has uploaded .	Unread	C	New ATTA	ACHMENT (000000004) Test file baded .	e has Unread	F		HMENT (00000 n Map has been	0362) 2nd <b>Floor</b> uploaded .	Unread
F New S uploa	SHOPDRAW (2) Test file has been ded .	Unread		New SHC	PDRAW (2) Test file has been	Unread	•		HMENT (00000 n Maps has bee	00363) 3rd <b>Floor</b> n uploaded .	Unread
New A	ATTACHMENT (000000292) useful sql		G	New ATTA	CHMENT (000000292) useful	sal			Monday, Jun	e 17, 2019	
has be	een uploaded .	Unread	C	has been	uploaded .	Unread	F			01, Change 000 LOOR MAKER BF	Unread
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	Thursday, July 11, 2019		C	w <sup>2</sup> e	<sup>3</sup> <b>r</b> <sup>4</sup> <b>t</b> <sup>5</sup> <b>y</b> <sup>6</sup> <b>u</b> <sup>7</sup>	i o p	q	ẃe	r t	y°u′i°	о́р
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	< 0 □				▽ 0 □			7	7 0		

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 ( <sup>Search</sup> is displayed):



## Refresh, Drop-Down Menu & Indicators

	t CMiC Approvals	da 🔻	CMiC Approvals	da 🗸
Refreshes the notifications list	+ FILTER OPTIONS	Q,	+ FILTER OPTIONS Availab Offline	information for the displayed
	A APPROVALS 4 F FYI	1584	A APPROVALS 4 ( 🛍 C	lear Data
	Friday, July 12, 2019		Friday, July 12, 2	
No checkmarks - only the subject of	F New ATTACHMENT (000000290) issue_1732113 has been uploaded .	Unread	New ATTACHMENT (00000029)     issue_1732113 has been uploaded .	Log Out
this notification is downloaded	Please Approve Registered Invoice SUSREG89 in the amount of \$10,000.00 ANALYZE	<sup>0</sup> Unread	Please Approve Registered Invoice SUSREG89 in the amount of \$10,000.0 for vendor AXIS Technologies and Job ANALYZE	<sup>0</sup> Unread
Double	New ATTACHMENT (000000004) Test file ha	as Read	New ATTACHMENT (000000004) Test file h been uploaded .	<sup>as</sup> Read
checkmarks - all the information for this notification is	F New SHOPDRAW (2) Test file has been uploaded .	Unread	F New SHOPDRAW (2) Test file has been uploaded .	Unread Exits the application
downloaded and details are available offline	F New ATTACHMENT (000000292) useful_sq has been uploaded .	Unread	F New ATTACHMENT (000000292) useful_sc has been uploaded .	l Unread
	F New ATTACHMENT (000000291) output habeen uploaded .	<sup>S</sup> Unread	F New ATTACHMENT (000000291) output has been uploaded .	<sup>3S</sup> Unread
	F New ATTACHMENT (000000295) Request for Payment has been uploaded .	<sup>Or</sup> Unread	F New ATTACHMENT (000000295) Request f Payment has been uploaded .	<sup>ior</sup> Unread
	F New ATTACHMENT (000000293) broadmoo has been uploaded .	<sup>Dr</sup> Unread	F New ATTACHMENT (000000293) broadmo has been uploaded .	<sup>or</sup> Unread
	F New ATTACHMENT (000000545) 2018-11-08_16-53-20 has been uploaded .	Unread	F New ATTACHMENT (000000545) 2018-11-08_16-53-20 has been uploaded .	Unread
	F New ATTACHMENT (000000546)	Unread	(F) New ATTACHMENT (000000546)	Unread

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 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**

Exits to main page Expands/collapses the informational section at the lower part of the page	Plonse Approve Ri Invoice SUSREG89 of \$10,000.00 Technologies and Comments	in the amount ) for vendor AXIS	Tap to approve the current request Opens the files attached to the current request (if any) Tap to re-assign the current request
	Invoice Header		
	COMPANY	SUS - SB Urban Systems	Tap to reject the
	VENDOR	AXIS - AXIS Technologies	current request
	REGISTRATION GROUP	SUSGRP - SB US Registration Group	
	INVOICE SERIES	SUIN - SB US Invoice series	
	INVOICE NUMBER	SUSREG89	
	INVOICE DATE	12-JUL-19	
	AMOUNT ON INVOICE	10,000.00	
	TAX 1 TAXABLE AMOUNT	3,500.00	
	TAX 1 AMOUNT	227.50	
	TAX 2 TAXABLE AMOUNT	0.00	
	TAX 2 AMOUNT	650.00	
	TAX 3 TAXABLE	0.00	
	$\triangleleft$	0 🗆	

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 reassigned to another user:

← *	🖓 🛃 Approve
Please Approve R Invoice SUSREG89 of \$10,000.00 Technologies and Comments	) in the amount
Invoice Header	
COMPANY VENDOR REGISTRATION GROUP INVOICE SERIES INVOICE DATE AMOUNT ON INVOICE TAX 1 TAXABLE AMOUNT TAX 1 AMOUNT TAX 2 TAXABLE AMOUNT TAX 2 AMOUNT	SUS - SB Urban Systems AXIS - AXIS Technologies SUSGRP - SB US Registration Group SUIN - SB US Invoice series SUSREG89 12-JUL-19 10,000.00 3,500.00 227.50 0.00 650.00
TAX 3 TAXABLE	0

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**

New ATTAC 2019-07/04_ uploa/ed.	HMENT (000000296) 3-12-50 has been	Tap to close this FYI
to exit to the main Do ument	Details	
page	00000296	
DESCRIPTIO	2019-07-04_8-12-50	Tap to re-assign this FYI
COPIES		Tap to re-assign this P ff
STATUS		
expand/collapse detail section		
AREA COMPA	NY	
PROJECT TY	PE	
DOCTYPE		
ATTACH. TYP	E	
REVIEWER N	AME	
Revisions		
Audit Histo	ry	

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

Microsoft 365 Device Managem	ent		¢² ⊗	?	сміс
«	Dashboard > Device enrollment - Apple enrollment				
Dashboard	Device enrollment - Apple enrollment	t			×
All services		es an Apple MDM Push certificate to manage Apple devices, and supports multiple enrollment methods. Set up the MDM te to begin. Learn more			
Device enrollment	Overview     Overview     Overview     Prerequis				
Conditional Access		pple MDM Push certificate			
to Security Baselines	Apple enrollment	artificate required to manage Apple devices			
Device configuration	Android enrollment				
The Devices	Windows enrollment Bulk enro	ollment methods			
Desktop Analytics	Terms and conditions	pple Configurator			
Software updates		anage Apple Configurator enrollment			
Client apps	Device categories				
🔓 Users		nrollment program tokens			
🕍 Groups	Device enrollment managers	anage Device Enrollment Program and Apple School Manager			
🍰 Roles	Monitor				
X Troubleshoot	Enrollment failures				
🎭 Tenant status	Audit logs				
	Incomplete user enrollments				
	Help and support				
	Help and support				

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.

Microsoft 365 Device Manag	gement				₽ © ?	
	Client apps - Apps					
Dashboard	Client apps - Apps					
All services     FAVORITES	Search (Ctri+/)	K 🕇 Add 🖸 Refresh 🔻 Filter 🛓 Eq	port EE Columns			
🖏 Device enrollment	Overview	Search by name or publisher				
Device compliance	Manage	NAME	T2 TYPE	STATUS	ASSIGNED	
Conditional Access	Apps	CMiC Mobile Crew Time	iOS line-of-business app		Ves	
Security Baselines	App protection policies	CMIC Mobile Field	IOS line-of-business app		Yes	
Device configuration	App configuration policies	CMiC Mobile Field	iOS store app		Yes	
Devices	App selective wipe					
Desktop Analytics	iOS app provisioning profiles					
Software updates	Monitor					
Client apps	App licenses					
Lusers	Discovered apps					
Groups	App install status					
♣ Roles ★ Troubleshoot	App protection status					
Troubleshoot	Audit logs					
Tenant status	Setup					
	iOS VPP tokens					
	Windows enterprise certificate					
	🕫 Windows Symantec certificate					
	Microsoft Store for Business					
	🔶 Windows side loading keys					
	Branding and customization					
	App categories					
	Managed Google Play					
	Help and support					

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.

osoft 365 Device Mana				¢ <b>●</b> ◎ ?	OM
	Client apps - A				
Dashboard	Add app	« ×	Search the App Store		
All services	* App type				
AVORITES	iOS	~	CMC Found 10 apps	United States (defau	0
levice enrollment	* Search the App Store			PUBLISHER	
evice compliance	Select app	>			
onditional Access	* App information		CMiC Mobile Sigld	CMIC	
ecurity Baselines	Configure	2			
evice configuration	Scope (Tags)		CMiC Approvals	CMIC	
evices	0 scope(s) selected		Annual		
esktop Analytics			CMIC Pay Stub	CMIC	
oftware updates			BEAMER		
ient apps			CMIC Time Tracker	CMiC	
sers			The second		
roups			CMiC Mobile Crew Time	CMIC	
oles			Control and Control of		
roubleshoot			CMIC Subcontractor Rating	CMIC	
nant status			Market Control of Cont		
			CMIC,App 0	Central Informatica S.A. de C.V.	
			マート 「harmo」電子お菓手帳サービス(ハルモ)	CMIC Healthcare Co., Ltd.	
			cubeSafetyApp	(주)씨알메스큐브	
			Concord app	07383-0-2	
			O shall be	(ZAH)DHALA BM	
	Add		Select		

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.

Microsoft 365 Device Mana						Ç	₽ @ ?	омс
	Client apps - App co Dashboard > Client apps - App co							
Dashboard	Client apps - App configu	uration policies						
All services	,O Search (Ctrl+/)	* + Add						
Device enrollment	Overview	· Pilter by Name						
Device compliance	Manage	NAME	PLATFORM	ASSIGNED	UPDATED	ENROLLMENT TYPE	SCOPE TAGS	
Conditional Access	Apps	CMIC MCT Policy	ios	Yes	7/26/19, 9:02 AM	Managed devices	No	
Security Baselines	App protection policies	On-Prem Mobile Server	Configurat iOS	Yes	7/25/19, 7:28 AM	Managed devices	Yes	
Device configuration	B App configuration policies							
Devices	App selective wipe							
Desktop Analytics	iOS app provisioning profiles							
Software updates	Monitor							
Client apps	App licenses				G			
Users	Discovered apps				<b>v</b> 0			
Groups Roles	App install status							
Roles Troubleshoot	App protection status							
Tenant status	Audit logs							
renamic status	Setup							
	iOS VPP tokens							
	Windows enterprise certificate							
	Windows Symantec certificate							
	Microsoft Store for Business							
	Windows side loading keys							
	Branding and customization							
	# App categories							
	Managed Google Play							
	Help and support	-						

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.

Microsoft 365 Device Manag	gement		🔎 🎯 ?	
	Client apps - App configuration policies > On-Prem Mobile Server Configuration - Properties > Configuration settings			
Dashboard	On-Prem Mobile Server Configuration - Properties * × Configuration settings			
E All services	Search (Dr(+/)     Search (Dr(+/)     On-Press Mobile Server Configuration			
Device enrollment	Overview     Description      One the policy is created, the format cannot be changed			
Device compliance     Conditional Access	Manage Default Mobile Server URL in Mobile Field App Configuration settings format   Enter XML data	~		
Security Baselines	III Properties <u>all</u> Assignments <u>app you are configuring. Contact the supplier of the app to learn the   </u>			
B Device configuration	Monitor Device enrollment type  Use. Use.	e values you can		
Devices	Device install status     Platform			
Class app Class app	Image: Second Dapid     Scope (Dapid)       Scope (Dapid)     Scope (Dapid)       Tacoper(s) selected     Scope (Dapid)       Tacoper(se			
	Sing. OK			

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:

		CMIC MOBILE FIELD SETTINGS
1	CMiC Approvals	ENVIRONMENT
0	CMiC Contact Manager	Web Services Endpoint Enterprise URL >
	CMiC Daily Journals	Enterprise URL http://test4v10bi.cmic.ca:7003/cmictest
101	CMiC Mobile Crew Time	FEATURES
	CMiC Mobile Field	RFI
	CMiC Pay Stub	DATA MANAGEMENT
٥	CMiC Photo Log	Delete Data Older Than (days) 10
0	CMIC RFI	Image Quality Medium 1024x768 (672kb) >
	CMiC Subcontractor Ratings	DAILY JOURNAL PREFRENCES
[263]	FortiToken	Hide/Show Daily Journal Tab
	Learn Java	Temperature Unit Fahrenheit >
	OneDrive	Weather location Device GPS >
	TestFlight	Period To Sync Journals (Days) 30
	Zoom	PHOTO LOG DISPLAY MODE

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