NAVIGATING CMIC

Reference Guide covers the following items:

- How to login
- Launching applications and their typical action buttons
- Querying & filtering log views
- Export log views to Excel
- User Profile Update info / Change Password / Set Email Notifications

How to Login

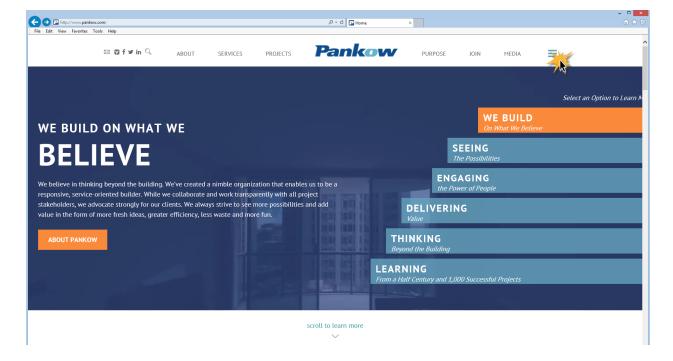
CMiC is web based software program and Pankow utilizes Internet Explorer 11.

Note: Other web browsers are supported but Pankow might not be able to help you with questions or errors related to CMiC.

The project collaboration team lead from Pankow will send you an email with your username and password. CMiC is accessed via www.pankow.com website. Below is screen shots on how to access the collaboration page.

CMiC Access

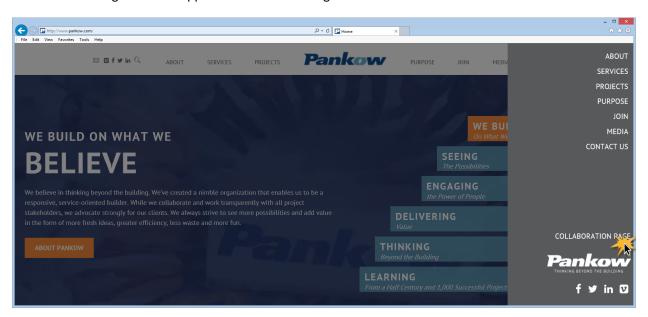
Go to www.pankow.com and click the "Fly Out Menu". From here navigate to "Collaboration Page"



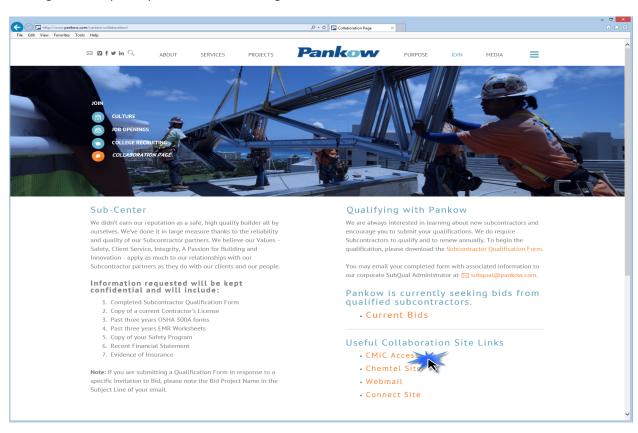


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"Collaboration Page" link will appear above Pankow Logo



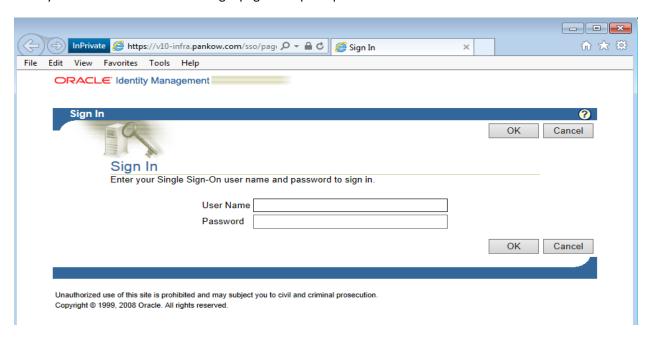
Clicking this link opens up the Collaboration Page where the CMiC Access link resides



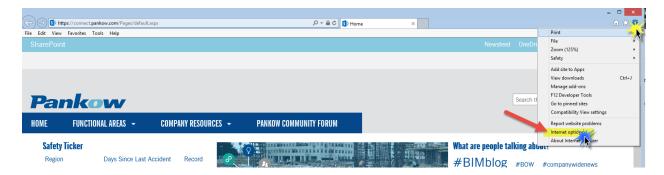


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Once you Click "CMiC Access" the login page will open up

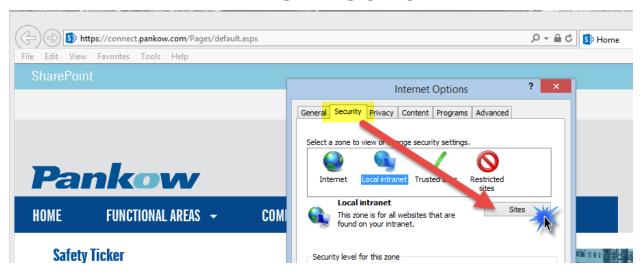


- User Name = Enter your user name
- Password: Enter your password
- ** If you have an issue logging in, you might need to adjust your Internet Explorer Settings due to security. Follow these steps to adjust:
 - Internet Options > Security Tab > Sites
 - o Add "https://v10-pm.pankow.com "

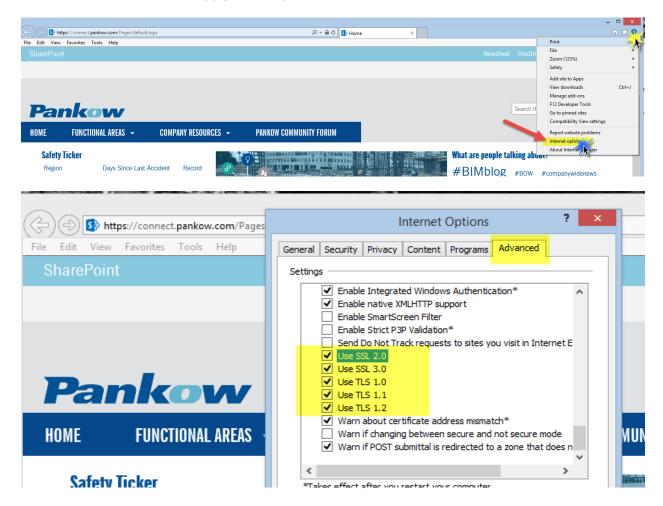




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- Internet Options > Advanced Tab > Settings (Scroll to Bottom of List)
 - Make sure Security boxes for SSL/TLS are All checked
 - Click Apply and Okay

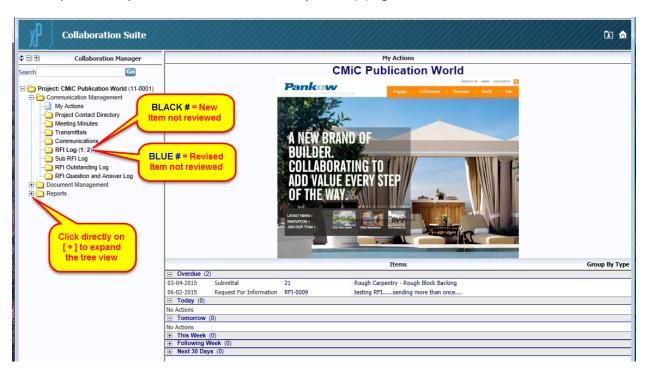




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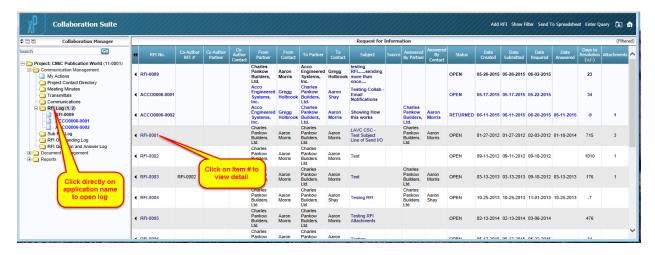
Upon logging in, CMiC will load the projects and tree view menu items you have been granted access to (this varies depending on your role on the project). The start page will default to "My Actions". This is a system generated to do list for items that you have been designated as the "To:" or "Responsible" person on applications, like RFI's.

The tree view is defaulted to have the Communication Management folder expanded, but all other folders are collapsed. To expand these folders, click directly on the [+] sign.



Launching an Application

To launch an application, click directly on the name of the application in the tree view menu. In the screen where "My Actions" is, a log view of that application will appear (Screen shot below, shows example of the RFI Log).





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To open an individual item, click on a blue text item – above example shows RFI # and Subject have blue text, by clicking on the blue text the RFI will open.

Communication folder applications will be Bolded and with black or blue numbers (Similar to Outlook) for items that are New (Black) or Updated (Blue) indicating you haven't looked at them. Once you view them, these will update automatically - RFI Log (3, 1)

Log View Header Buttons

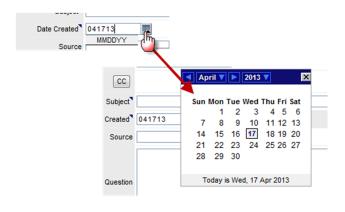
Each log view will have Header Buttons. Below are the most common



- [Add XXXX]: Add new record
- [Show Filter]: This shows the "Log View" Filter and allows the user to modify what is seen on the screen. User can save his own defaults.
- [Send to Spreadsheet]: This sends the "Log View" to excel. Only sends what is visible in the log.
 - o Scroll to bottom of the log to verify that all rows are showing
 - o If you want to show filtered items as well need to clear filter
- [Enter Query]: Opens the Query fields at the top of each column for filtering based on your criteria

Application Field Hints

• **Date fields:** To enter a date you can manually type it, format = MMDDYY or you can click on the calendar icon to pull a calendar then by clicking the day it will fill in this field



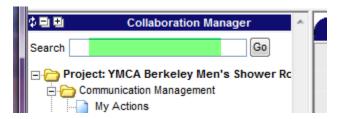
To^{*}

- Blue Up or Down Arrows:

 By clicking on the error, a popup widow will display a LOV (List of Values) specific to that field that can be selected.
- Search: You can search an application by key words and it will list the items in the log view



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Note: Need to make sure when done searching, to remove the key word

Filtering / Querying Information

CMiC Log views can be filtered, queried and exported to excel. Once you open the application, the view you see we call a "Log View". The column headers describe the information shown. Most logs are pre-filtered and this will be shown in the far right corner as (Filtered).

Standard Action Buttons on Log Views



- [Add XXXX]: Add new record
- [Show Filter]: Shows the fields that are filtered. Also allows user to enter different filter requirements
- [Send to Spreadsheet]: User can send the log to Excel templates
- **[Enter Query]:** Adds a query line to the log view. The user can then query on each column. This query will pull all info that is in the log even if filtered out of the normal view.

Filtering

To display, clear and/or change the default filter for the Log View, click on "Show Filter" button. The filter will appear and show the items being filtered by default.



Action Buttons

- [Save as Default]: User can define, then save their own default filter that will remain in place till
- [Reset To System Defaults]: Resets filter to system defaults



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• [Show All Filters]: Shows all the columns that the user can filter by, even if the column doesn't show up in the on screen log view

• [Clear]: Clears the filter

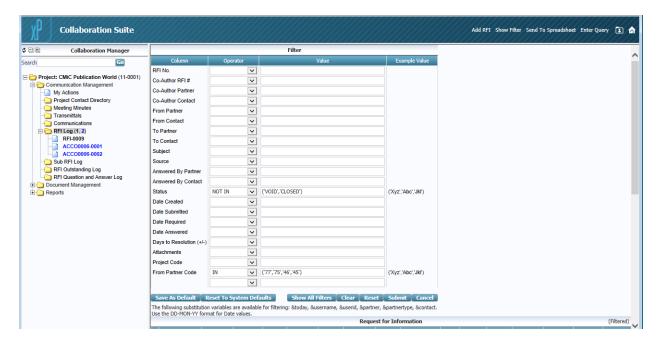
• [Reset]: Resets the filter

• [Submit]: Executes the filter

• [Cancel]: Cancels the request

Example of how to filter - This Example will show how to filter on the "Attachments" column

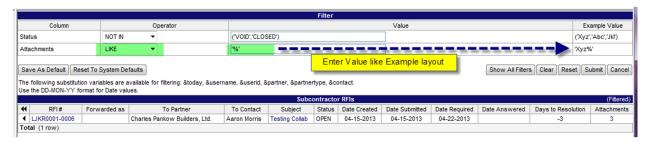
- **Column:** Shows the columns which the user can filter on
- **Operator:** Provides a LOV from which the user can choose the operator you want to filter that column on
- Value: Enter the filter criteria follow the "Example Value" Column on how to enter the criteria
- Example Value: Shows how the "Value" should be entered into CMiC
- 1. From the Log View, click "Show Filter" then click "Show All Filters" to show all the columns that can be filtered
- 2. To filter on the "Attachments" column, select the operator. Two different options for this example
 - a. Operator = IS NOT NULL no value is required and will filter out rows that do not have a value in them



b. Operator = Like – Value = '%' – filter rows with a value in them only



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Example of how to query - This Example will show how to query on the "Subject" column

- 1. Click "Enter Query" and the log view will add a row which will have blue highlighted fields. You can query on any combination of the columns
- 2. Enter the operator and the value to query by (See below for the different operators)
- 3. Once value is entered, click "Execute Query". The query will bring in ALL records even items filtered out by default
 - a. Example 1: Query using %????
 - b. Example 2: Query using ????%
 - c. Example 3: Query using %????%
- 4. Click "Clear Query" then "Execute Query" to take you back to default view

There are too many query combinations that can be used to show examples for each. Queries only filter data, so feel free to play around with different symbols and see what kind of results are shown

\triangleright	_	Underscore character represents a single character
\triangleright	%	Percent sign represents any combination of characters
	=	Equal To
	!=	Not Equal To
\triangleright	<>	Not Equal To
\triangleright	>	Greater Than
	>=	Greater Than or Equal To
\triangleright	<	Less Than
\triangleright	<=	Less Than or Equal To
\triangleright	Between	Between Two Values
	Not Between	Results will be outside of the "Not Between" values

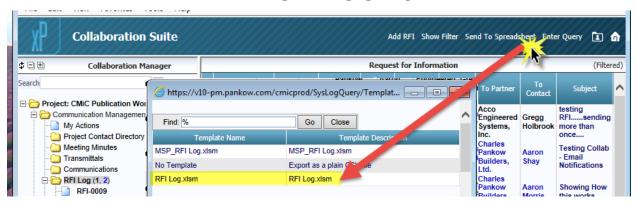
Export Log views to Excel

Log views have the ability for the items listed on the screen within the view to be "Sent to Spreadsheet" to preformatted Pankow excel spreadsheets.

- 1. After opening the application Click "Send to Spreadsheet" a pop-up window will appear that allows the user to select a template
- 2. Click on the template name or description to open the file in this example RFI Log is selected.



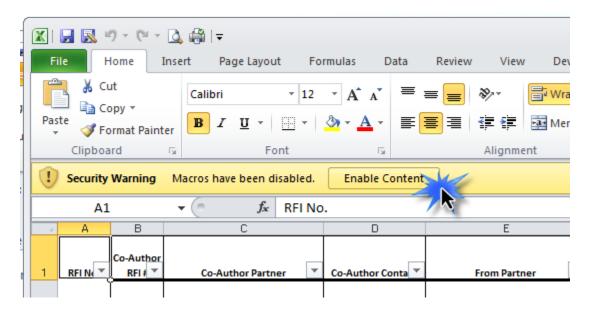
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- The Named Templates are preformatted reports (Logo, Print Area, Formatted Rows & Columns, etc.)
 - If you select "No Template" the file will dump into excel as raw data excel will not be preformatted and will be in file type csv.
- 3. If this dialog box appears click "Open"



4. The file will open in excel, click on "Options" to enable Marcos.



Change Password / Set Email Notifications

Once logged into CMiC you can change your password and set your email notifications you receive from the system.

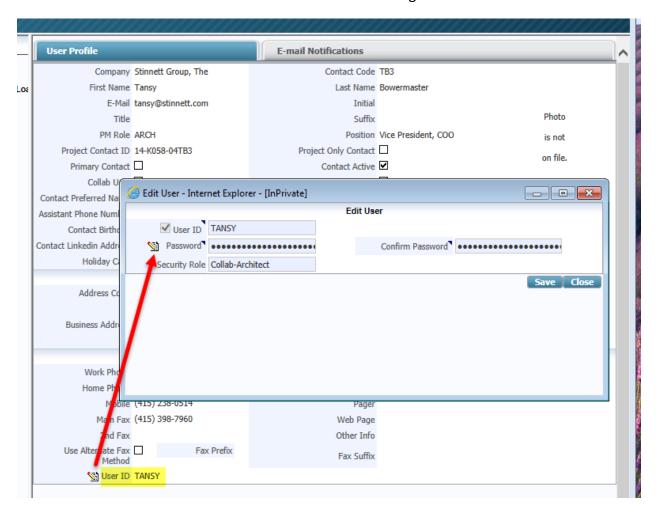


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Change Password:

Click on contact name via Project Contact Directory, and click on your name to open up contact info screen. At the bottom of the info section you will see "User ID". Next to that is a "Note Pad Icon". Click on this Icon to update change your password.

Password must be min of 6 characters with at least one being a number.



E-mail Notifications

Click on contact name via Project Contact Directory, and click on your name to open up contact info screen. Then click on E-mail Notifications. Once here, place a check mark in the box of the action you would like to receive an email on.

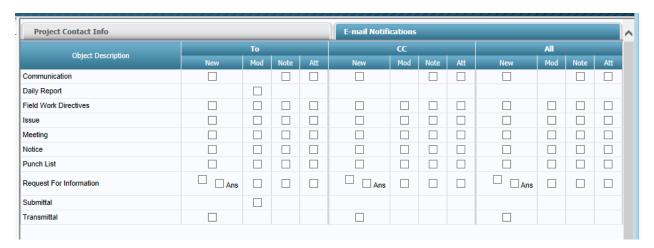
Once you receive the email, there will be a link that you can click on that will take you to the login page, then directly to the item.

TO = you will be notified if you have been selected as the "To" person



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- CC = you will be notified if you have been add as a cc
- ALL = you will be notified on ALL item regardless of whether or not you are the "To" person or on the cc list



Place a check mark by clicking in the box of which item you would like to receive an email notification from

- New = a new record is added to the system
 - o Ans = answer only
- Mod = if an existing record is modified (once user clicks on edit, then saves this is a modification)
- Note = if a note is added to an existing record
- Att = if an attachment is added

