

Oracle
**Construction Intelligence Cloud
Administration Guide**

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Oracle Construction Intelligence Cloud Administration Guide

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Getting Started

This document describes the tasks that are performed by an administrator for Construction Intelligence Cloud (CIC).

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Construction Intelligence Cloud Administration Overview

Construction Intelligence Cloud (CIC) is managed using the **Administration** module. The **Administration** module allows you to configure and manage data sources, and user access to the application.

Construction Intelligence Cloud currently supports data from the following source applications:

- ▶ Procore
- ▶ Autodesk

The administration application is packaged and delivered with the Construction Intelligence Cloud user interface.

Administrator Privileges

As a CIC administrator, you can:

- ▶ manage data from source applications.
- ▶ manage users access.

Accessing the CIC Administration Module

When your organization is provisioned with Construction Intelligence Cloud, as an administrator, you will receive the Construction Intelligence Cloud Administration Application URL in a Welcome email.

To sign in as an administrator to CIC:

- 1) In your Welcome email, click the Administration application URL available in the format:

https://<host>:<port>/cicadmin

where

<host>: Enter the host name or the server IP address of CICadministration application.

<port>: Enter the unique port number associated with the CIC administration application.

Note: For a list of supported browser versions, see the *Client System Requirements* document.

- 2) In the **Username** field, enter the user name of the cloud administrator.
- 3) In the **Password** field, enter a unique alphanumeric password.
- 4) Select **Sign In**.
The **Construction Intelligence Cloud Overview** page is displayed.
- 5) Select **Administration**.
The **Administration** page is displayed.
- 6) On the **Administration** page, select any of the following tiles:
 - ▶ **User Management:** Select to manage users accessing CIC.
For more details, see *Administering Users English/admin/admin_guide/89025.htm*.
 - ▶ **Data Management:** Select to manage data from source applications.
For more details, see *Administering Construction Intelligence Cloud Data* (on page 13).

About Your Login Credentials

New customers receive an initial email from no-reply@oracle.com to activate their Oracle Cloud account. The link has an expiration date mentioned at the bottom of the email. Make sure to activate your account before the link expires.

You will receive a separate welcome email from no-reply@primavera.oraclecloud.com that includes the URL to access CIC Analytics.

All other email communications coming from your CIC Analytics environment will be sent from no-reply@primavera.oraclecloud.com.

Tips

- ▶ If you do not receive either email, check the spam or junk folder in your email account, or reach out to your customer success manager or CIC administrator.
- ▶ In case you miss the activation window to activate your CIC Analytics account, reach out to your customer success manager or CIC administrator.
- ▶ Add no-reply@oracle.com and no-reply@primavera.oraclecloud.com to your address book or list of approved contacts.

Reset Your Password

You can reset your password for CIC at any time.

To reset your password:

- 1) Navigate to the **Oracle Cloud Account Sign In** page.
- 2) Select the **Need help Signing in? Click here** link.
- 3) On the **Forgot your password** page, enter your username, and then click **Next**.

- 4) Review the on-screen message, and click **Submit**.
- 5) Select **Password Reset** in the email you receive.
- 6) On the **Reset Your Password** page, complete the **New Password** and **Confirm New Password** fields.

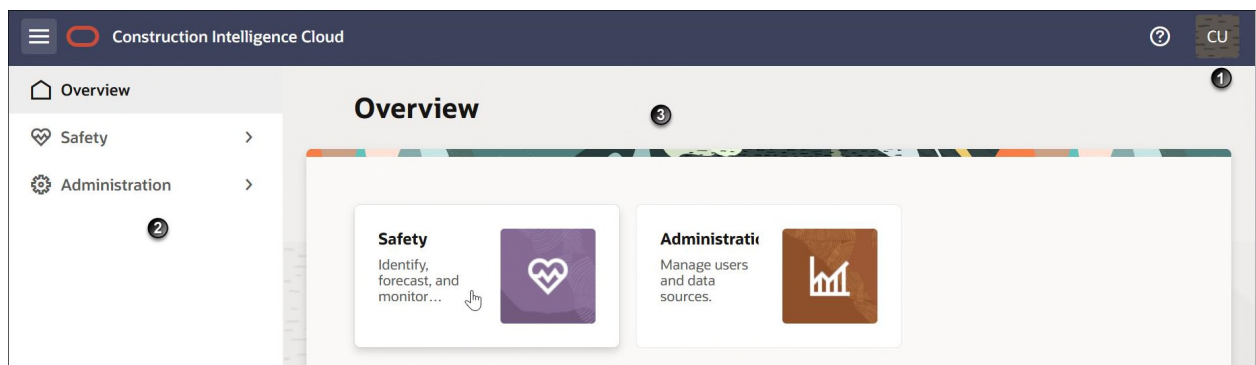
Note: The **Confirm New Password** field will not be active until your new password meets the specified criteria.

- 7) Click **Submit**.
- 8) Select **Click here** to continue to navigate back to the **Oracle Cloud Account Sign In** page, and log in with your new password.

Note: To allow time for system processing, it is recommended that you wait a few minutes before logging in with your new password.

Navigation Overview

The **Home** page of the Construction Intelligence Cloud displays the following menu and options.




Menu / Option	Description
Navigation Menu	Select to expand or collapse the Navigator pane.
Help	<p>The Help menu displays the following options:</p> <ul style="list-style-type: none"> ▶ Oracle Help Center: Select this option to access all guides in the CIC library. ▶ Training: Select this option to access training resources available for CIC. ▶ Support: Select this option if you need information on how to contact Oracle Support (see "Support" on page 30). ▶ About: View the product version and build information of CIC.

Menu / Option	Description
1	Displays the initials of the signed-in user. Select this option to sign out of the application.
2	Navigator The Navigator displays the modules you can access based on your role and the modules your organization has purchased. <ul style="list-style-type: none">▶ Overview: This is the main landing page.▶ Safety: Select this option to view the safety dashboards.▶ Administration: This option is available only if you are an administrator for Construction Intelligence Cloud. The following options display under Administration:<ul style="list-style-type: none">Data Management: Select this option to set up and manage data sources.User Management: Select this option to set up and manage users.
3	The selected module page is displayed. You can select the tiles displayed on the page to navigate within the selected module.

Navigating within the Application

You can navigate within the application using either the Navigator or the tiles on the page.

Using the Navigator:

- 1) Click the  **Navigation Menu** to display the **Navigator** pane.
- 2) In the **Navigator** pane, select a module.

Examples:

- ▶ To access the Administration module: In the **Navigator** pane, select **Administration**.
- ▶ To access the Benchmarks dashboard in the Safety module: In the **Navigator** pane, select **Safety**, and then select **Benchmarks**.

Using tiles

From the **Overview** page or from any of the module pages, select the tiles displayed on the pane.

Examples:

- ▶ To select the Administration module: From the **Overview** page, select the **Administration** tile.
- ▶ To access the Benchmarks dashboard in the Safety module: From the **Overview** page, select the **Safety** tile, and then select the **Benchmarks** tile.

Keyboard Shortcuts

General Interactive Keyboard Shortcuts

Action	Keys
Move to the next tab stop	Tab
Move to the previous tab stop	Shift+Tab
Toggle between row selection and cell selection	F8
Open the column header menu, when focus is on the column header	Enter or Space
Increase column width, when focus is on the column header	Windows: Ctrl+Right arrow Mac: Ctrl+Cmd+Right arrow
Decrease column width, when focus is on the column header	Windows: Ctrl+Left arrow Mac: Ctrl+Cmd+Left arrow
Move column to next column position, when focus is on the column header	Shift+Right arrow
Move column to the previous column position, when focus is on the column header	Shift+Left arrow
Sort ascending on the current column, when focus is on the column header	Windows: Alt+Up arrow Mac: Option+ Up arrow
Sort ascending on the current column in addition to the existing search columns, when focus is on the column header	Windows: Shift+Alt+Up arrow Mac: Shift+Option+ Up arrow
Sort descending on the current column, when focus is on the column header	Windows: Alt+Down arrow Mac: Option+ Down arrow
Sort descending on the current column in addition to the existing search columns, when focus is on the column header	Mac: Shift+Option+Down arrow
Move to next tab stop in column header menu, when column header menu is open	Tab
Move to previous tab stop in the column header menu, when column header menu is open	Shift+Tab
Close the column header menu, when the column header menu is open	Escape

Show help (if defined) for an item, when a single row is viewed and focus is on the column	Windows: Alt+F1 Mac: Option+F1
--	-----------------------------------

Date Picker

Action	Keys
Open the popup, when the input has focus and Display Mode is set to popup	Down arrow
Close the popup and focus the input, when Display Mode is set to popup	Escape
Focus the next element	Tab Note: When the Display Mode is set to popup and the last element is focused, pressing Tab moves focus to the first element
Focus the previous element	Shift+Tab Note: When the Display Mode is set to popup and the first element is focused, pressing Tab moves focus to the last element
Move focus to the same day of the previous week	Up arrow
Move focus to the same day of the next week	Down arrow
Move focus to the previous day	Left arrow
Move focus to the next day	Right arrow
Move focus to the first day of the current week	Home
Move focus to the last day of the current week	End
Change the grid of dates to the previous month	Page Up
Change the grid of dates to the next month	Page Down
Change the grid of dates to the previous year	Shift+Page Up

Change the grid of dates to the next year	Shift+Page Down
Select the focused date, when Show Time is off	Enter or Space
Select the focused date, when Show Time is on	Enter or Space, then Done

Administering Construction Intelligence Cloud Data

Data for Construction Intelligence Cloud can be sourced from multiple applications. To fetch data from each application, you can set up connections with each source application and select the data to be fetched into CIC.

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About Data Management


The Data Management module of Construction Intelligence Cloud enables you to manage data fetched from multiple source applications into CIC.

As a CIC administrator, use the Data Management module to:

- ▶ Set up new connections with data sources such as Procore and Autodesk
- ▶ view status of ingestion runs
- ▶ Run on-demand data ingestions for a connection

Accessing the Data Management Page

To administer applications that connect with CIC, and manage their data, access the **Data Management** page as follows:

- 1) Sign in to CIC.
- 2) From the  **Navigation Menu** select **Administration** and then select **Data Management**.
- 3) Proceed to view the status of ingestion runs or set up connections to other applications in CIC as outlined in the following topics:
 - ▶ **Connecting with Applications** (on page 14).
 - ▶ **Standard Tasks** (on page 19).

Connecting with Applications

As an administrator, you can set up connections to fetch images, project data, and user data from the following applications into CIC Advisor:

- ▶ **Procore** (see "**Connecting With Procore**" on page 14)
- ▶ **Autodesk** (see "**Connecting with Autodesk**" on page 17)

Connecting With Procore

To set up a connection with Procore, complete the following step sequence using the **Add New Connection** wizard:


- 1) **Adding a Procore Connection** (on page 14)
- 2) **Configuring Procore Data** (see "**Configuring Procore Settings**" on page 15)
- 3) **Creating an Initial Ingestion Schedule** (on page 16)

Adding a Procore Connection

As an administrator, you can set up a connection to fetch image and related data from Procore.

Note: CIC can have more than one connection to Procore. However, each unique Admin user can have only one connection with Procore.

To add a connection to Procore:

- 1) Sign in to CIC.
- 2) From the  **Navigation Menu** select **Administration** and then select **Data Management**.
- 3) On the **Data Source** page, from the **Add New Connection** drop-down list select **Procore**.
- 4) Select **Connect**.
The Procore login page is displayed.
- 5) Sign in with your Procore credentials and select **Continue**.
- 6) On the **Connection Details** page sign in with your Procore credentials:
 - a. In the **Procore URL** field, enter the procore URL in the format:
`https://login.procore.com/?cookies_enabled=true`
 - b. In the **Username** field, enter your unique user name used in Procore.
 - c. In the **Password** field, enter your alphanumeric password.
 - d. Select **Validate** to connect with Procore.

Notes:

- When you successfully **Connect** to Procore, only the **Disconnect** button is enabled and the **Connection Status** now displays *Connected as Procore User <user name>*.
- Users can have only one connection for each data source. If the same login credentials are used to connect to the same data source again, an error message displays.

e. Perform any of the actions listed below:

- Select **Continue** to **Configure Procore Settings** (see "**Configuring Procore Settings**" on page 15), or
- Select **Cancel** to discontinue setting up the connection at any time, and return to the **Data Management** page.

Configuring Procore Settings

As a CIC administrator, select and fetch the following types of data from Procore:

- ▶ Company: The company in Procore containing project data.
- ▶ Projects: A list of projects associated with the selected company in Procore.
- ▶ Media data: The media data and user data associated with the selected project.

Prerequisite

You have successfully completed the step, **Adding a Procore Connection** (on page 14).

Procedure

On the **Procore Settings** page, select the historical media data to be fetched from Procore to CIC:

- 1) In the **Historical Data** field, select the length of the historical data, and click **Continue**.
Choices include:
 - ▶ All (default)
 - ▶ 60 Days
 - ▶ 30 Days
 - ▶ 7 days
 - ▶ None
- 2) Select the projects to fetch from Procore as follows:
 - a. Select a company from the **Select Procore Company** drop-down list. All projects display by default.
 - b. (Optional) Use the 🔍 **Search** bar to focus your search on a subset of Procore projects.
 - c. Select the check box corresponding to each Procore project to fetch its media data into CIC. You must select at least one project.
 - d. Select **Continue** to **create an ingestion schedule** (see "**Creating an Initial Ingestion Schedule**" on page 16) for Procore data.

You can also select **Cancel** to discontinue setting up the configuration and return to the **Data Management** page.

Creating an Initial Ingestion Schedule

To complete the connection setup with Procore, you will need to create an initial ingestion schedule to fetch project data at predetermined frequency into CIC.

Note: The ingestion schedule created during initial connection setup cannot be deleted.

Prerequisites

You have completed the following steps successfully:

- ▶ **Adding a Procore Connection** (on page 14)
- ▶ **Configuring Procore Settings** (on page 15)

Procedure

To add your first ingestion schedule for Procore data:

- 1) On the **Ingestion Schedule** page, select **+Add Schedule**.
- 2) In the **Add Schedule** pane, enter the following required information to set up a schedule:
 - a. In the **Schedule Name** field, enter a name for the ingestion schedule. For example, *Weekly Run*.
 - b. In the **Start Date** field, select the **Calendar** icon and select a date for the first schedule run.
 - c. In the **Repeat** field, select the frequency of occurrence of the ingestion schedule.
 - d. In the **Every** field, quantify how often the ingestion schedule should run. For example, *every 2 days*.
 - e. In the **Time** field, set the start time of the ingestion schedule. The time format displays as per your preferences. For example, *14:00* hours.
- 3) Select **Add** to create an ingestion schedule.

If you click **Cancel**, the configuration setup is discontinued, and you will return to the **Data Management** page.
- 4) Select **Done** to:
 - ▶ complete the Procore configuration setup in CIC
 - ▶ run a data ingestion immediately
 - ▶ set an automatic data ingestion schedule daily at 12:00 AM UTC
- 5) Proceed to the **Ingestion Schedule** page to view the daily ingestion schedule automatically created for Procore.

Note: You cannot delete the ingestion schedule initially created using the wizard.

Connecting with Autodesk

To set up a connection with Autodesk, complete the following step sequence using the **Add New Connection** wizard:


- 1) **Adding an Autodesk Connection** (on page 17)
- 2) **Configuring Autodesk Settings** (on page 18)
- 3) **Creating an Initial Ingestion Schedule** (on page 18)

Adding an Autodesk Connection

As an administrator, you can set up a connection to fetch image and related data from Autodesk.

Note: CIC can have more than one connection to Procore. However, each unique Admin user can have only one connection with Autodesk.

To add a connection to Autodesk:

- 1) Sign in to CIC.
- 2) From the  **Navigation Menu** select **Administration** and then select **Data Management**.
- 3) On the **Data Source** page, select *Autodesk* from the **Add new connection** drop-down list and select **Continue**.
- 4) On the **Connection Details** page, sign in with your Autodesk credentials:
 - a. In the **Autodesk URL** field, enter the Autodesk application URL in the format: *https://login.autodesk.com/logon?*
 - b. In the **Username** field, enter your unique user name used in Autodesk.
 - c. In the **Password** field, enter your alphanumeric password.
 - d. Select **Validate** to connect with Autodesk.

Notes:

- When you successfully **Connect** to Autodesk, only the **Disconnect** button is enabled and the **Connection Status** now displays *Connected as Autodesk User <user name>*.
 - Users can have only one connection for each data source. If the same login credentials are used to connect to the same data source again, an error message displays.
- e. Perform any of the actions listed below:
 - Select **Continue** to **Configure Autodesk Settings** (see "**Configuring Autodesk Settings**" on page 18).
 - Select **Cancel** to discontinue setting up the connection, and return to the **Data Management** page.

Configuring Autodesk Settings

As a CIC administrator, select and fetch the following data from Autodesk:

- ▶ Account: The Autodesk account containing project data.
- ▶ Projects: A list of projects associated with an Autodesk account.
- ▶ Media data: The media data and user data associated with the selected project.

Prerequisite

You have successfully completed the step, **Adding an Autodesk Connection** (on page 17) .

Procedure

On the **Autodesk Settings** page, select the historical media data to be fetched from Procore to CIC:

- 1) In the **Historical Data** field, select the length of the historical data, and select **Continue**.
Choices include:
 - ▶ All (default)
 - ▶ 60 Days
 - ▶ 30 Days
 - ▶ 7 days
 - ▶ None
- 2) To select Autodesk projects:
 - a. Select an account from the **Select Autodesk Company** drop-down list.
All projects associated with the selected company display by default.
 - b. (Optional) Use the 🔍 **Search** bar to focus your search on a subset of Autodesk projects.
 - c. Select the checkbox corresponding to each Autodesk project to fetch its media data into CIC. You must select at least one project.
Projects that have already been selected for CIC by other administrators appear disabled.
 - d. Select **Continue** to **create an ingestion schedule** (see "**Creating an Initial Ingestion Schedule**" on page 16) for Autodesk data.
You can also select **Cancel**, to discontinue setting up the configuration and return to the **Data Management** page.

Creating an Initial Ingestion Schedule

To complete the connection setup with Autodesk, you will need to create an initial ingestion schedule to fetch project data at predetermined frequency into CIC.

Note: The ingestion schedule created during initial connection setup cannot be deleted.

Prerequisites

You have completed the following steps successfully:

- ▶ **Adding an Autodesk Connection** (on page 17)
- ▶ **Configuring Autodesk Settings** (on page 18)

Procedure

To set up the initial ingestion schedule for Autodesk project data:

- 1) On the **Ingestion Schedule** page, select **Done** to:
 - ▶ complete the Autodesk configuration setup in CIC
 - ▶ run a data ingestion immediately
 - ▶ set an automatic data ingestion schedule daily at 12:00 AM UTC

If you select **Cancel**, the configuration setup is discontinued, and you will return to the **Data Management** page.

- 2) Select any of the following actions:
 - ▶ View the daily ingestion schedule automatically created for Autodesk. on the **Ingestion Schedule** page.
 - ▶ View the new Autodesk connection created on the **Data Management** page.


Standard Tasks

You can perform the following tasks to manage data from any data source such as Procore or Autodesk.

- ▶ Run an ingestion schedule.
- ▶ Update ingestion schedule.

Running an Ingestion Schedule

To run an ingestion schedule on-demand:

- 1) Sign in to CIC.
- 2) From the  **Navigation Menu** select **Administration** and then select **Data Management**.
- 3) On the **Data Management** page, select the **Ingestion** icon for a specific data source **Connection Name**.
- 4) On the **Ingestion** page, select **Run**.
- 5) In the **Run a new Ingestion?** dialog box, select **Run** to reconfirm.
Select **Cancel** if you want to discontinue the configuration setup and the ingestion run.
The ingestion schedule run will be added to the queue.

Adding Ingestion Schedules

You can plan for additional ingestion schedules with differing frequencies to fetch data from one or more data sources as needed.

To set up additional ingestion schedules:

- 1) On the **Ingestion** page, click **+Add Schedule**.
- 2) In the **Add Schedule** pane, enter the following required information to set up a schedule:

- a. In the **Schedule Name** field, enter a name for the ingestion schedule. For example, *Weekly Run*.
 - b. In the **Start Date** field, click the **Calendar** icon and select a date for the first schedule run.
 - c. In the **Repeat** field, select the frequency of the ingestion schedule.
 - d. In the **Every** field, quantify how often the ingestion schedule should run. For example, *every 2 days*.
 - e. In the **Time** field, set the start time of the ingestion schedule. The time format displays as per your preferences. For example, *14:00* hours.
- 3) Click **Add** to create an ingestion schedule.

The **Ingestion Schedule** page displays a new tile with the specified **Schedule Name**.

Updating Ingestion Schedules

To update an ingestion schedule, contact Oracle Support and raise a service request. Alternately, you can run an ingestion on-demand, as needed.

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Administering Users

The **User Management** module of Construction Intelligence Cloud CIC allows you to:


- ▶ view, create, and manage roles.
- ▶ add CIC-Only users.
- ▶ edit user profiles.
- ▶ grant access to CIC by assigning a role.
- ▶ change access to a data source.

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Accessing the User Management Module

To access the User Management Module:

- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.

Note: The Administration module is displayed only for users with Admin role.

About the User Management Page

User Management CIC Users

This is the first page you will see when you select the **User Management** module. This page displays all users that have access to CIC.

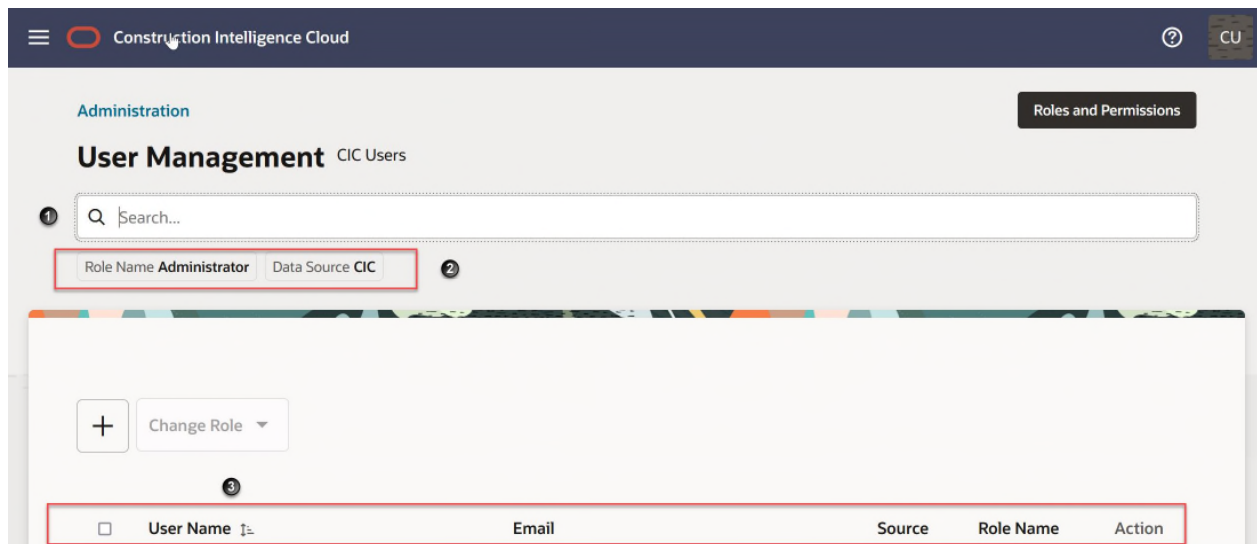
From this page you can:

- ▶ View users with access to CIC.
- ▶ Edit a user's profile.
- ▶ Create a CIC-only user.

- ▶ Change a user's role in CIC.
- ▶ Remove or add user access to a data source.

Note: All users who are brought over from various source applications via ingestion are by default given access to CIC, and are assigned the Consumer role.

Filtering, Sorting, and Searching for Users



Screen Elements	Description
1	Search Bar: Look up users by typing parts of their username or email ID in the Search Bar to find a specific user.

Screen Elements	Description
2	Smart Filters: Filter the table using smart filters for Role Name and Data Source . For example, select the Data Source filter to either view users from all sources, or from a specific configured sources. A drop down option allows you to choose from the available options. The table is refreshed to display the output based on your filter choices. The default option for the Data Source smart filter is All Sources .
3	Sort: You can sort the columns in ascending or descending order by selecting the column title.

About Standard Roles


Users in your organization may have varied needs when viewing and accessing data in CIC. By assigning roles to users you can give them access to CIC. Roles in CIC are used to specify what a user can do and the modules they can access. You can either assign users to one of the two pre-configured standard roles or create custom roles. For more information on creating custom roles, see topic ***Creating a Custom Role*** (on page 26).

The two pre-configured standard roles are:

- ▶ **Super Administrator:** User can access all Admin and CIC workspace modules.
- ▶ **Consumer:** User can access all CIC workspace modules.

Viewing Roles

To view the configured roles:

- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) Select **Roles and Permissions**.


All the configured roles are displayed.

- 3) Select the **View Role** button next to a role to view details of the selected role.

Creating a Custom Role

CIC is pre-configured with two roles (Consumer and Super Administrator).

To create additional roles:


- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) Select **Roles and Permissions**.
- 3) Select **Create Role**.
- 4) In the **Create Role** panel:
 - a. Enter a name and description for the new role.
 - b. Choose the Admin and CIC workspaces the user role can access. You can select multiple options.
- 5) Select **Create**.

Notes:

- For each role you create, you must have the role associated with at least one module from the Admin or CIC workspace.
 - You can create up to five custom roles.
-

Editing a Role


To edit a custom role:

- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) Select **Roles and Permissions**.
- 3) Select the **Edit Role** button next to the role you want to modify.
- 4) In the **Edit Role** panel, make the required changes.
- 5) Select **Apply Changes**.

Note: You cannot make changes to the pre-configured roles: Super Administrator and Consumer.

Deleting a Role

To delete a custom role:



- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) Select **Roles and Permissions**.
- 3) Select the **Edit Role** button next to the role you want to delete.
- 4) In the **Edit Role** panel, select the **Delete** icon.
- 5) In the confirmation dialog box, select **Delete** to confirm the deletion.

Note: You cannot delete the pre-configured roles.

Creating CIC-Only Users


CIC-Only users are users that are directly added in CIC and are not ported from any source application. Creating a CIC-Only user allows you to give users access to the data in CIC without giving them access to the source application.

To create a CIC-Only user:

- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) On the **User Management CIC Users** page, select  **Add User**.
- 3) In the **Add User** panel enter the following information:
 - a. In the **User Details** tab, enter the email ID, username, first name, last name and phone number.
 - b. Select **Next**.
 - c. In the **Role & Data Source** tab, select a **role** from the **Role** drop down list.
 - d. From the **Datasource** drop down list, select the data source the user can access. Note, you can select multiple options.
- 4) Select **Save**.

Modifying Access to a Data Source

To modify user access to a data source.



- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) On the **User Management CIC Users** page, use the check box to select users.
- 3) From the **Change Role** drop down list, select a new role.

Tip:

You can also change a user's role from the **Edit User** panel by selecting the  **Edit** icon next to the user's name.

Editing User Profile

You can use the **Edit User** panel to change a user's profile information, role, and their access to a data source.

- 1) From the  **Navigation Menu**, select **Administration**, and then select **User Management**.
- 2) On the **User Management CIC Users** page, select the  **Edit** icon next to a user's name to open the **Edit User** panel.
- 3) In the **User Details** tab, modify the email ID, user name, first name, last name and phone number.
- 4) Select **Next**.
- 5) In the **Role & Data Source** tab, select a role from the drop-down.
- 6) Modify the data sources the user can access.
- 7) Select **Save**.

Managing Personal Information

This chapter describes how to manage your personal information (PI) in Construction Intelligence Cloud.

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About Consent Notices

Consent notices inform users how personal information (PI) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PI. Oracle Construction and Engineering products help you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PI your organization holds as part of any source application that can be configured with Construction Intelligence Cloud.

You may be asked to provide consent to show that you understand the need to treat PI as secure data. You may also be asked to provide consent for your organization to collect, process, store and transmit your PI. If you refuse consent, you will be denied access to Construction Intelligence Cloud.

You can withdraw your consent at any time by contacting your administrator of your source application such as Procore or Autodesk.

About Personal Information

Personal information (PI) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example, a person's IP address, phone IMEI number, gender, and location at a particular time could all be personal information. Depending on local data protection laws, organizations may be responsible for ensuring the privacy of PI wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

Caution: Personal information (PI) may be at risk of exposure. Depending on local data protection laws, organizations may be responsible for mitigating any risk of exposure.

Configuring Consent Notices for Construction Intelligence Cloud

Construction Intelligence Cloud consumes data from source applications and makes it available to CIC users. End-users must give their consent in the *source* application to read and agree to the consent message to ensure they:

- ▶ have access to the data in CIC
- ▶ understand the responsibilities with regard to data protection and security

Cookies Policy in Construction Intelligence Cloud

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

For more information on Oracle's data collection processes and privacy commitments, see:

- ▶ Oracle Cloud Services Agreement
<http://www.oracle.com/us/corporate/contracts/saas-online-csa-us-1894130.pdf>
(<http://www.oracle.com/us/corporate/contracts/saas-online-csa-us-1894130.pdf>)
- ▶ Oracle Privacy Policy <https://www.oracle.com/legal/privacy/services-privacy-policy.html>
(<https://www.oracle.com/legal/privacy/services-privacy-policy.html>)
- ▶ Oracle Data Processing Agreement
<https://www.oracle.com/corporate/contracts/cloud-services/>
(<https://www.oracle.com/corporate/contracts/cloud-services/>)

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations which do not adequately protect PI they gather and store. Data visible to an CIC user depends on the consent notices configured and accepted by users in the source applications.

If these laws apply to your organization, it is your responsibility to ensure consent notices are configured in the source applications before they are required.

Support

If you have a question about using Construction Intelligence Cloud that you cannot resolve with information on Oracle Help Center, visit My Oracle Support (MOS).

Note: If you have an account at **Construction and Engineering Support Portal** <https://cegbu.custhelp.com/>, you can log in to the

portal to create a service request. For more information see section **Oracle Support Portal** (on page 36).

My Oracle Support

Visit our support website for the latest information on contacting Oracle Global Customer Support and accessing our knowledge articles: [**https://support.oracle.com/**](https://support.oracle.com/) ([**https://support.oracle.com/**](https://support.oracle.com/)).

Once registered, you can search the Knowledge Base and communities, and learn our tips and best practices for using MOS. Note that you must be granted access by your organization's CUA to create SRs.

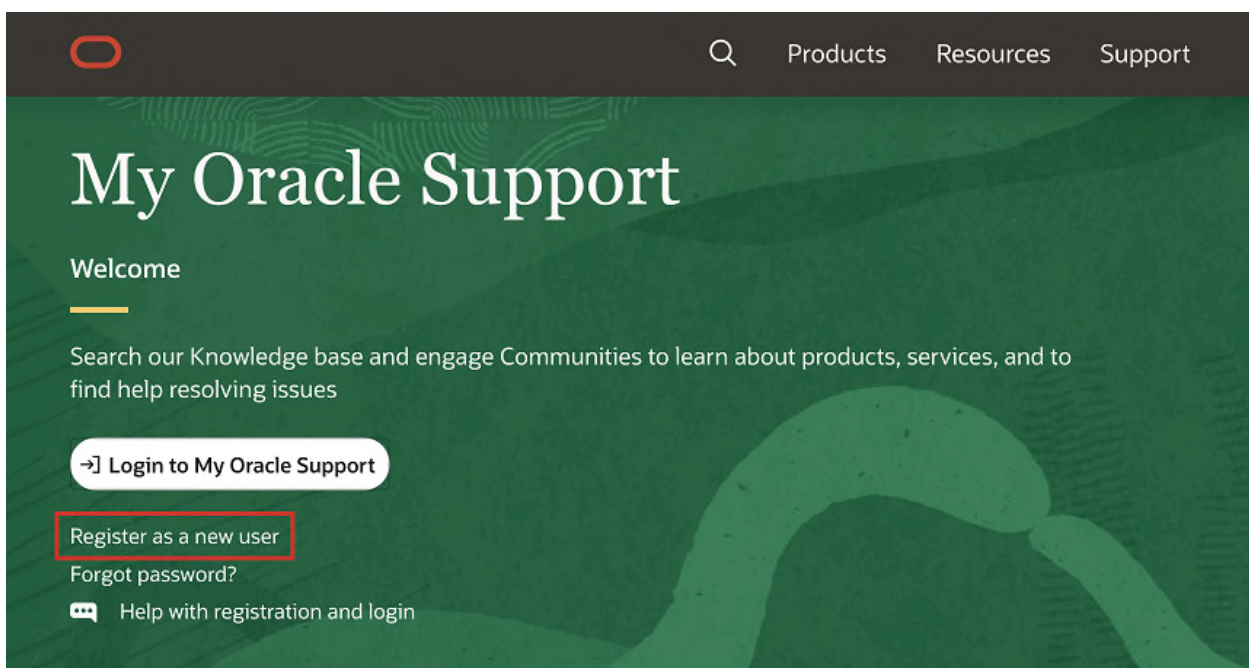
Oracle customers who have purchased support have access to electronic support through MOS. For information, visit:

- ▶ My Oracle Support
- ▶ **Oracle Accessibility Learning and Support**
[**https://www.oracle.com/corporate/accessibility/learning-support/**](https://www.oracle.com/corporate/accessibility/learning-support/) (if you are hearing impaired)

How to Register

Note: The steps below may be different if using the Cloud Portal.

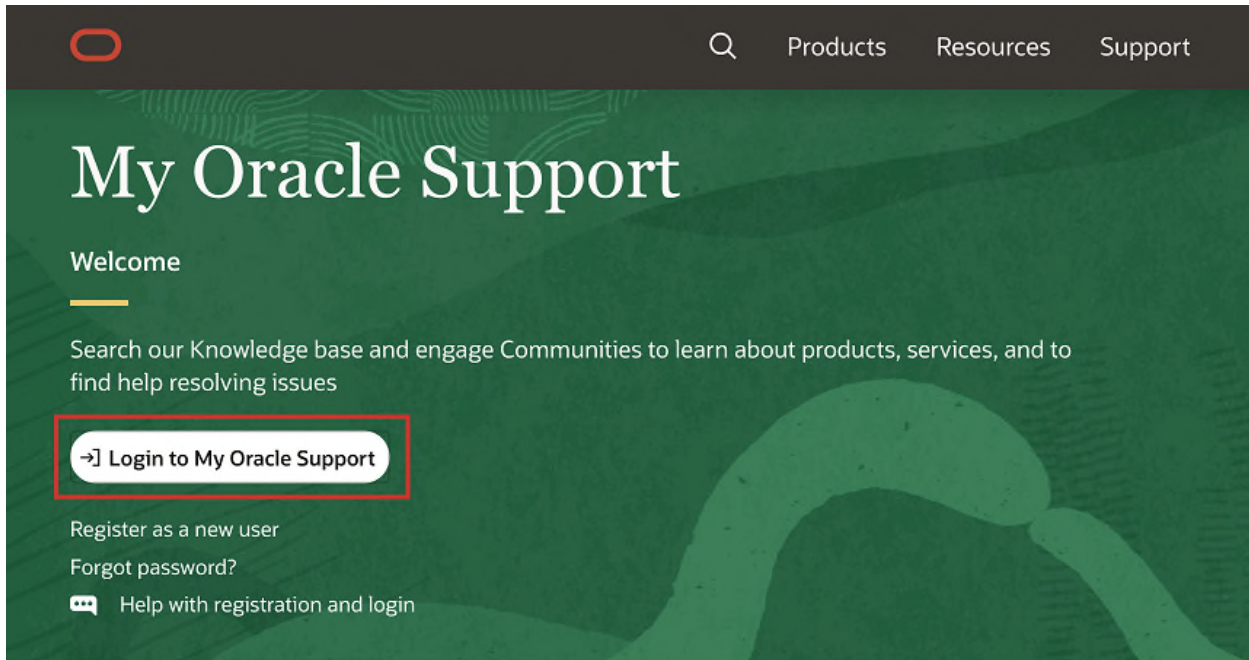
- 1) Go to My Oracle Support and select **Register as new user**.



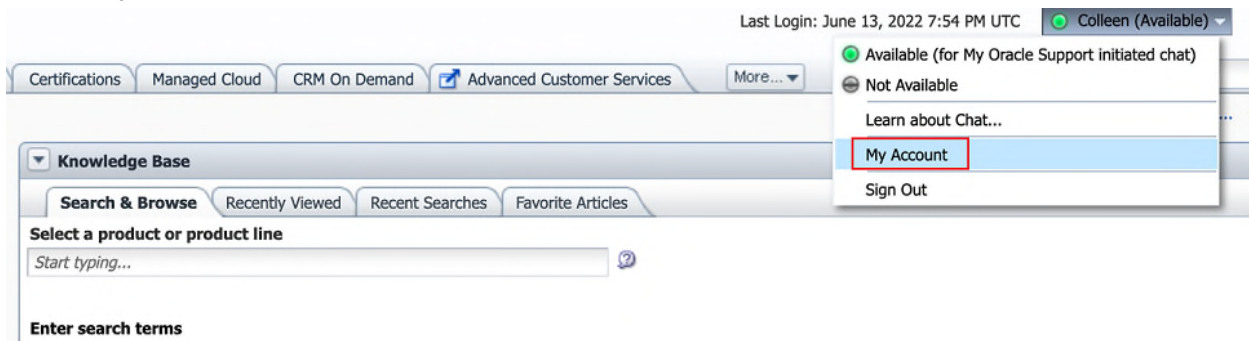
- 2) Fill out the form and select **Create Account**. Oracle will send you an email to verify your email address.

The screenshot shows the 'Create Your Oracle Account' page on the Oracle My Oracle Support website. At the top, the Oracle logo and 'My Oracle Support' text are displayed. Below this is the main heading 'Create Your Oracle Account' and a link 'Already have an Oracle Account? Sign In'. The form contains several input fields: 'Email Address' (with a note 'Your email address is your username.'), 'Password' (with a note 'Passwords must have upper and lower case letters, at least 1 number and special character, not match or contain email, and be at least 8 characters long.'), 'Retype password', 'Country' (a dropdown menu showing 'USA'), 'Name' (split into 'First or Given Name' and 'Last Name'), 'Job Title', 'Work Phone', 'Company Name', 'Address', 'City', 'State/Province' (a dropdown menu showing '-Select-'), and 'ZIP/Postal Code'. At the bottom of the form, there is a link 'You may opt-out of all marketing communications: Unsubscribe.' and a paragraph of terms and conditions. A green 'Create Account' button is highlighted with a red rectangle.

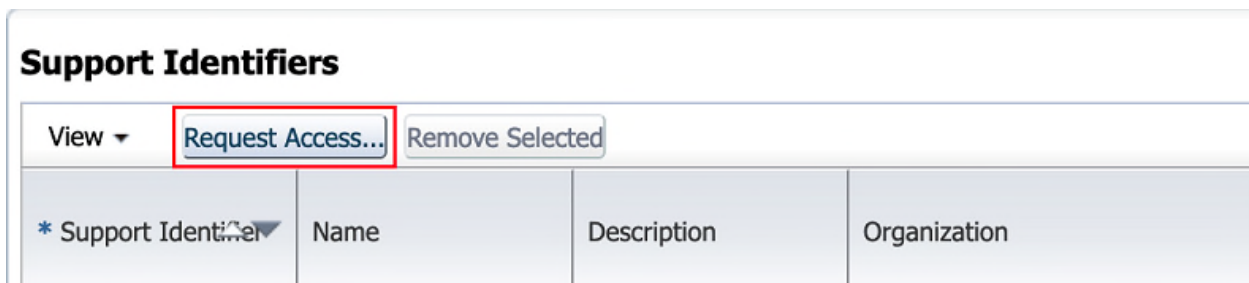
- 3) Once your email address is verified, go back to My Oracle Support. Select **Login to My Oracle Support**. Use the account credentials you just created to log in.



- 4) Once logged in, locate the dropdown featuring your name along the upper-right and select **My Account**.



- 5) In the **Support Identifiers** section, select **Request Access**.



- 6) Enter your **Support Identifier (SI)**, along with the first five letters of your organization name if prompted. Your SI is included in the Oracle welcome email; ask your Customer User Administrator (CUA) to provide the information if needed.

The screenshot shows a web form titled "Request Access to a Support Identifier" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "Request Access to a Support Identifier" (which is selected) and "Find a Support Identifier". The main content area contains the following elements:

- Text: "Use this page to connect your user account to a Support Identifier."
- Text: "Don't know your Support Identifier?" followed by a blue link icon and the text "Visit the Registration Help".
- A text input field labeled "Note to Approver" in orange text.
- A text input field labeled "* Support Identifier" in orange text, which is highlighted with a red rectangular border.
- A blue button labeled "Request Access..." in the bottom right corner.

7) Select **Request Access**. The request will then be sent to the CUA for approval.

Note: You will be assigned as the CUA if you are the first person from your organization to request access using your organization's SI. See **Customer User Admin (CUA)** (on page 34) for more details.

Once registered, you can search the Knowledge Base and communities, and learn our tips and best practices for using MOS. Note that you must be granted access by your organization's CUA to create SRs.

Oracle customers who have purchased support have access to electronic support through MOS. For information, visit:

- ▶ My Oracle Support
- ▶ **Oracle Accessibility Learning and Support**
<https://www.oracle.com/corporate/accessibility/learning-support/> (if you are hearing impaired)

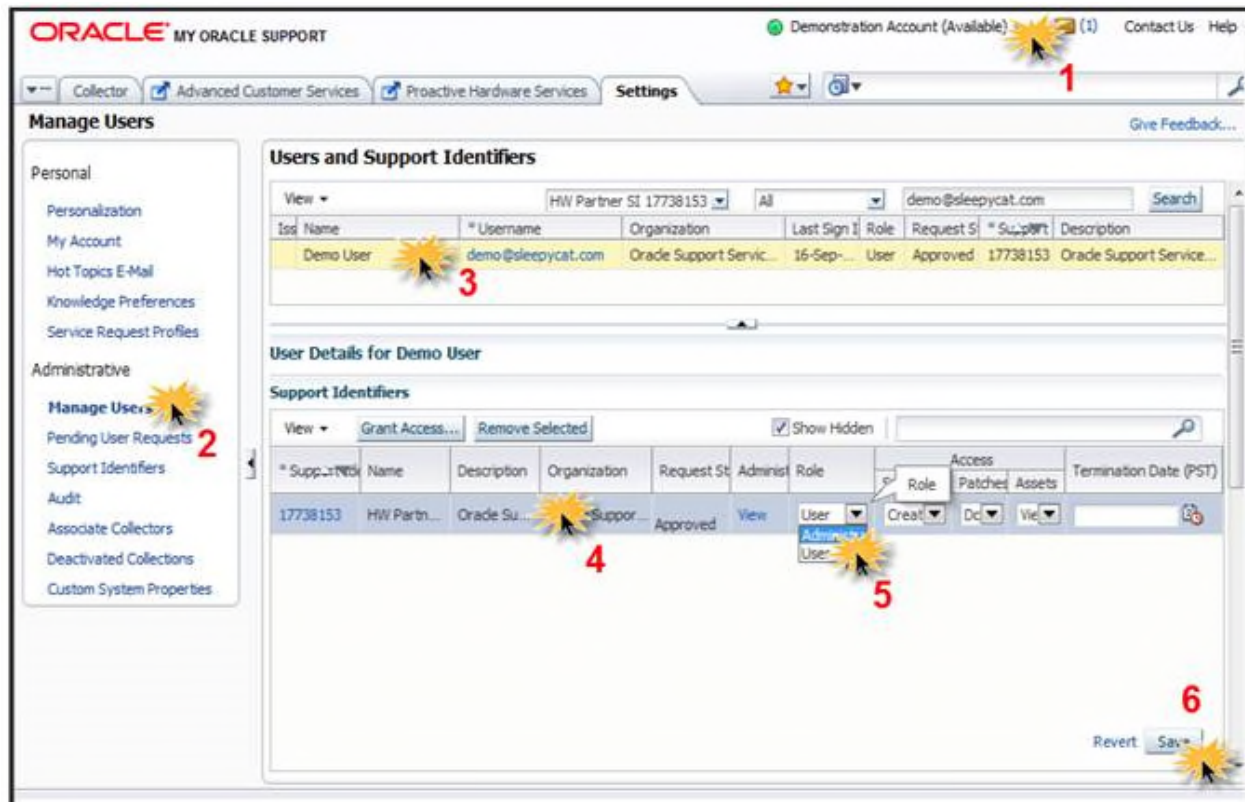
Customer User Admin (CUA)

The Customer User Admin (CUA) manages all users for their SI. The CUA can approve or deny user access, assign user privileges, and more.

Oracle recommends having at least two CUAs for every SI. The CUA can assign the role to other users by following the steps below.

To assign a user as a CUA:

Note: The steps below may be different if using the Cloud Portal.



- 1) Log in to My Oracle Support. Select the drop-down menu next to your display name, and then choose **My Account**.
- 2) Select **Manage Users** under the **Administrative** category on the left.
- 3) Select the row of the user you want to modify.
- 4) Their user details will display below. Select the row.
- 5) In the **Role** list, select **Administrator**.
- 6) Select **Save**.

For more information on the CUA role, select the **Customer User Administrator** tab on our How-to Video Training Series page.

Create a Service Request (SR)

To access tutorials on how to create an SR, select the **Service Request Management** tab on our How-to Video Training Series page. Note that you must be granted access by your organization's CUA to create SRs.

When you create an SR, be sure to enter the correct product information and problem details so that the request is assigned to the proper Oracle Support team.

Information Centers

Information centers organize documents found on My Oracle Support (MOS) and provide access to:

- ▶ Important support and product information, such as links to recently created knowledge base articles and product announcements
- ▶ Oracle University training
- ▶ Communities where industry peers share best practices

Access the information center for your product here.

Support Renewals Process

If it's time to renew support for your Oracle products, or if you would like to sign up for auto-renewal of your support services, visit My Support Renewals.

Additional MOS Help

- ▶ Learn our tips and best practices for using our support services.
 - ▶ Watch the How-to Video Training Series
 - ▶ Read our Working Effectively With Oracle Support - Best Practices guide
- ▶ Visit the My Oracle Support Communities to collaborate with peers and share best practices.

Oracle Support Portal

If you have a question about using Construction Intelligence Cloud that you cannot resolve with information on Oracle Help Center, visit the **Oracle Construction and Engineering Support Portal** (<https://cegbu.custhelp.com/>).

First time users can create an account at the **Oracle Construction and Engineering Support Portal** (<https://cegbu.custhelp.com/>) by selecting **Sign In/Sign Up** or by going directly to <https://cegbu.custhelp.com/app/createContact> (<https://cegbu.custhelp.com/app/createContact>). After signing up, log in to start using the portal.

To learn more about getting support, review the Related Topics below or watch our video on **Using the Oracle Support Portal** (<https://www.oracle.com/ce-help/support-portal/>).

Access to Oracle Support

Oracle customers have access to electronic support through Support Cloud. Contact Oracle Global Customer Support using the **Oracle Construction and Engineering Support Portal** (<https://cegbu.custhelp.com/>), or give us a call using the support phone number for your region.

For information about Oracle's commitment to accessibility, visit **Oracle Accessibility Program** (<https://www.oracle.com/corporate/accessibility/learning-support/>).

How to Ask a Question

The Oracle Construction and Engineering Support Portal allows you to easily ask our Support Team questions.

To ask a question and create an Oracle Service Request (SR):

- 1) Select **Ask A Question** (<https://cegbu.custhelp.com/app/ask>) in the **Oracle Construction and Engineering Support Portal** (<https://cegbu.custhelp.com/>).
- 2) On the **Contact Form**, enter the following details for your Oracle service request:
 - ▶ **Product:** Select Construction Intelligence Cloud.
 - ▶ **Service Type:** Select the option that best describes your request.
 - ▶ **Subject and Description:** Enter details for your request. The more information you provide, the quicker we can respond to your inquiry.
 - ▶ **Contact Information:** Enter details for all required fields and include the email addresses of any additional contacts.
- 3) Select **Submit Request**.

What happens next?

You will receive an email confirming that we have received your request. This email will include your SR reference number, which can be used for your reference. You can reply to this email if you would like to provide an update on your question.

A member of our Support team will review your question and respond as soon as possible. If you would like to speak to our Support team, please call us and quote your SR reference number. See the Support page for phone numbers.

If you would like to keep track of or update your question on the Support Portal, you may log in or register as a new user. See **How to Log In or Register on the Support Portal** (on page 37).

How to Log In or Register on the Support Portal

Registering an account and logging in to the Oracle Construction & Engineering Support Portal allows you keep track of and update the Oracle Service Requests (SRs) you have raised with our Support team. This is optional, as you can still ask a question using the Ask A Question form and communicate with our Support team by email.

To log in as an existing user:

- 1) Go to **Sign In** (<https://cegbu.custhelp.com/app/utils/login>).
- 2) Enter your Oracle account Username. This is typically your email address.
- 3) Enter your Password. If you have forgotten your password, select the information icon next to the password field and enter your email address to receive a password reset link.

To register as a new user:

- 1) Go to **Sign Up** (<https://cegbu.custhelp.com/app/createContact>).
- 2) Enter your First Name, Last Name, and Email.
- 3) Select **Create an Account**.
- 4) Check your email for instructions on how to complete registration.

Note: If you get a message stating that an account already exists with your email address, this could be because:

You may have an existing Oracle account. If so, please proceed to **Sign In** (<https://cegbu.custhelp.com/app/utills/login>).

You may have been pre-configured on the Support Portal at the time of registering your Oracle Cloud Service and would have received a 'Welcome Email' with instructions on how to complete setup. If you missed this, please proceed to **create an Oracle account** (<https://cegbu.custhelp.com/app/createContact>). Once your Oracle account is created, you will be ready to log in to the Support Portal.

After you are logged in, you can:

- ▶ Review and update the Oracle service requests you have previously logged
- ▶ If you are an Admin user, you can also review and update the Oracle service requests your organization has logged.

How to Review and Update Oracle Service Requests (SRs)

Upon logging in to the Oracle Construction & Engineering Support Portal, you will be able to review, and update Oracle service requests (SRs) raised with our Support team. This is optional, as you can still raise questions using the **Ask A Question** (<https://cegbu.custhelp.com/app/ask>) form and communicate with our Support team by email.

To view your Oracle SRs:

- 1) **Sign in** (<https://cegbu.custhelp.com/app/utills/login>) to Support Portal.
- 2) Once you have signed in, you will see your dashboard. You can select one of the tile options, depending on what you would like to see:
 - ▶ **My Open SRs**: Shows questions that you have logged that are currently open with our Support Team.
 - ▶ **SRs Pending My Action**: Shows questions that you have logged that require your response.
 - ▶ **My Past SRs**: Shows questions that you have previously logged, which have been solved.

If you are an Admin user, you will also see:

- ▶ **My Org Open SRs**: Shows questions logged by users in your organization that are currently open with our Support Team.
 - ▶ **My Past Org SRs**: Shows questions that your organization has previously logged which have been solved.
- 3) In the selected view you will find the Report Filters panel on the left, which you can use to search your SRs by **Reference #**, **Severity**, **Status**, **Sub-Status**, and by **Organization**.
 - 4) Selecting the blue hyperlinked **SR Reference #** will open the **Communication History** page, from where you can view all communication with our Support Team, as well as additional info such as the current status of the question.

To Update your questions:

- 1) Navigate to **My Open SRs**. (see instructions above on how to view your questions).

- 2) Select the blue hyperlinked **SR Reference #** to open up the request you'd like to update.
- 3) Answer the question 'Do you want a response?' with:
 - ▶ **Yes, please respond to my question:** If you are adding additional information to the question and would like a response from our Support Team
 - ▶ **No, I don't need this question answered now:** If you are requesting the question to be closed and do not require additional support
- 4) Add additional information to your question and attach any additional files as required.
- 5) Select **Submit**.

Note: You can also update an open question by simply replying to emails our Support Team send you. When doing so, please ensure the email subject is not changed so that it correctly routes to our team.

User Access Levels and Adding New Users

There are two types of access levels on the Oracle Construction & Engineering Support Portal, Basic and Admin.

Basic User

Can create, view, and update their own questions.

Admin User

- ▶ Can create, view, and update their own questions.
- ▶ Can view and update all questions logged by users within their organization.
- ▶ Can add users from their organization to the Support Portal.

To add a new user from within your organization:

- 1) After you have signed in, select your email address at the top right corner of your dashboard and select **User Provisioning**.
- 2) Fill out the first name, last name, and email fields in the form.
- 3) At this point, you can decide whether to add someone as a basic or admin user.
 - ▶ If you want to add someone as a basic user, select **Submit**.
 - ▶ To create an admin user, select the applicable organization from the **Assign Organization(s)/Instance(s)** dropdown.

Your organization might be listed across more than one instance, so you can select each occurrence in the dropdown list if you like, depending on what access you want the new user to have.

- ▶ Each organization is listed with the product name, organization name, and the Instance/server it is registered on.
- 4) After you have made your selection, select **Submit**.

Note: If you need to revoke access for an existing user or if you need to change a user from an Admin user to a Basic user, please contact Support.

What happens next?

The new user will receive an email verifying their details along with instructions to complete setting up their account.

Product Accessibility

For information about Oracle's commitment to accessibility, visit the **Oracle Accessibility Program website** (<https://www.oracle.com/corporate/accessibility/>).