Oracle® Construction and Engineering Intelligence

Administration Guide





Oracle Construction and Engineering Intelligence Administration Guide,

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About This Guide

This document describes the tasks that are performed by an administrator for Construction and Engineering Intelligence.

Audience

This document is intended for Construction and Engineering Intelligence Administrators.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Conventions

The following text conventions are used in this document.

Convention	Meaning	
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.	
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.	
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.	



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Using an Identity Domain

All Oracle Construction and Engineering Intelligence customers whose environments are provisioned on Oracle Cloud Infrastructure (OCI) have access to an identity domain account. If you're the tenant administrator, you can access the identity domain to manage password security for the users added to your environment. Managing password security from your identity domain console is not necessary for you or other users to log in to Construction and Engineering Intelligence, so the following actions are optional based on your organization's security needs. The information for how to access your company's identity domain console is included in your welcome email. You can choose to change the password policies for your environment users. Some examples of password policies that the tenant administrator can manage in an identity domain include the number of days until passwords expire, the required password complexity, and how many unique new passwords a user must use before they can reuse an old password, among other criteria. To learn more about your identity domain and password policies, see the documentation for your identity domain.

- Oracle Cloud Infrastructure Identity and Access Management users: see Managing Password Policies.
- Oracle Identity Cloud Service users: see Manage Oracle Identity Cloud Service Password Policies.

An identity domain might also provide the ability to set up an external identity provider to handle user credentials, with the identity domain acting as the service provider. To learn more about managing identity providers in your identity domain, visit the documentation for your identity domain.

- Oracle Cloud Infrastructure Identity and Access Management users: see Manage Identity Providers.
- Oracle Identity Cloud Service users: see Manage Oracle Identity Cloud Service Identity Providers.

If your tenant administrator needs to be replaced for any reason, or if you have questions about your identity domain or would like to explore further actions in your identity domain, contact Oracle Support.

Administration Overview

Construction and Engineering Intelligence is managed using the Administration module.

As a Construction and Engineering Intelligence administrator, you can manage data from source applications and manage user's access to the application.

Construction and Engineering Intelligence currently supports data from the following sources:

- Procore
- Autodesk Construction Cloud
- Autodesk BIM 360
- P6 EPPM cloud service
- Primavera Unifier cloud service

Accessing the Administration Module

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

To sign in as an administrator to Construction and Engineering Intelligence:

1. In your Welcome email, click the application URL.



For a list of supported browser versions, see Client System Requirements.

- 2. In the **Username** field, enter the user name of the application administrator.
- 3. In the **Password** field, enter your password.
- Select Sign In.

The Construction and Engineering Intelligence Overview page is displayed.

5. From the Navigation Menu, 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 Construction and Engineering Intelligence.

For details, see Administering Users.

Data Management: Select to manage data from source applications.
 For details, see Administering Construction and Engineering Intelligence Data.

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 that includes the URL to access Construction and Engineering Intelligence.

Tip:

- 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 Construction and Engineering Intelligence administrator.
- In case you miss the activation window to activate your Construction and Engineering
 Intelligence account, visit the URL listed in the initial welcome email and select the Forgot
 Password? link.

Resetting Your Password

You can reset your password for Construction and Engineering Intelligence at any time.

To reset your password:

- Navigate to the Oracle Cloud Account Sign In page.
- 2. Select the Need help Signing in? Click here link.
- On the Forgot your password page, enter your user name, and then click Next.
- Review the on-screen message, and click Submit.
- 5. Select **Password Reset** in the email you receive.
- On the Reset Your Password page, complete the New Password and Confirm New Password fields.



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.

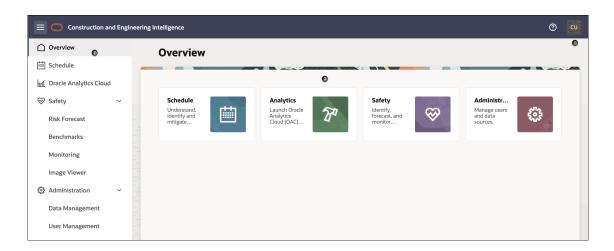


To allow time for system processing, it is recommended that you wait a few minutes before logging in with your new password.



Navigation Overview

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



Menu / Option	Description
Navigation	Select to expand or collapse the Navigator pane.
① Help	 The Help menu displays the following options: Oracle Help Center: Select this option to access all guides in the Construction and Engineering Intelligence library. Training: Select this option to access training resources available for Construction and Engineering Intelligence. Support: Select this option if you need information on how to contact Oracle Support. About: View the product version and build information of Construction and Engineering Intelligence.
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. Overview: This is the main landing page. Safety: Select this option to access the safety module. Analytics: Select this option to connect, build, and view visualizations in Oracle Analytics Cloud. This module is displayed only if your organization has purchased the license for Construction and Engineering Analytics. Administration: This option is available only if you are an administrator for Construction and Engineering Intelligence. The following options display under Administration: 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 \equiv Navigation Menu to display the Navigator pane.
- 2. In the Navigator pane, select a module.

Examples:

- To access the Administration module: From the Navigation Menu, select Administration.
- To access the Analytics module: From the Navigation Menu, select Analytics. A new tab
 opens with Oracle Analytics Cloud.
- To access the Benchmarks dashboard in the Safety module: From the **Navigation Menu** pane, select **Safety**, then select **Benchmarks**.
- To access the Monitoring dashboard in the Safety module: From the **Navigation Menu** select **Safety**, then select **Monitoring**.

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 select the Analytics module: From the **Overview** page, select the **Analytics** tile. A new tab opens with Oracle Analytics Cloud.
- To access the Benchmarks dashboard in the Safety module: From the Overview page, select the Safety tile, then select the Benchmarks tile.
- To access the Monitoring dashboard in the Safety module: From the Overview page, select the Safety tile, then select Monitoring 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



Action	Keys
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	Windows: Alt+Up arrow
column header	Mac: Option+ Up arrow
Sort ascending on the current column in addition to the	Windows: Shift+Alt+Up arrow
existing search columns, when focus is on the column header	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	Windows: Alt+F1
viewed and focus is on the column	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
	When the Display Mode is set to popup and the last element is focused, pressing Tab moves focus to the first element.



Action	Keys	
Focus the previous element	Shift+Tab	
	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 and Engineering Intelligence Data

Data for Construction and Engineering Intelligence 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 Construction and Engineering Intelligence.

Accessing the Data Management Module

To administer applications that connect with Construction and Engineering Intelligence, and manage their data, access the **Data Management** module as follows:

- From the Navigation Menu, select Administration and then select Data Management.
- 2. Proceed to view the status of ingestion runs or set up connections to other applications in Construction and Engineering Intelligence as outlined in the following topics:
 - Connecting with Applications
 - Administering Ingestion Tasks

About Data Management

The Data Management module enables you to manage data fetched from multiple source applications into Construction and Engineering Intelligence.

As a Construction and Engineering Intelligence 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 ingestion for a connection.

If your organization has purchased Construction and Engineering Analytics module, you can configure the following data sources:

- P6 EPPM cloud service
- Primavera Unifier cloud service

Connecting with Applications

As an administrator, you can set up connections to fetch images and related data from Procore, Autodesk Construction Cloud, and Autodesk BIM 360.

If your organization has purchased Construction and Engineering Analytics module, you can configure the following data sources:

- P6 EPPM cloud service
- Primavera Unifier cloud service

Connecting with Procore

To set up a connection with Procore, complete all the steps in sequence using the **Add New Connection** wizard.

Adding a Procore Connection

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



Construction and Engineering Intelligence can have more than one connection to Procore. However, each administrator user can have only one connection with Procore.

To add a connection to Procore:

- 1. From the Navigation Menu, select Administration, then Data Management.
- 2. On the Data Source page, from the Add New Connection drop-down list, select Procore.
- Click Connect.

The Procore login page is displayed.

- 4. Sign in with your Procore credentials and click **Continue**.
- 5. 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.

Notes:

- When you successfully connect to Procore, only the **Disconnect** button is enabled and the **Connection Status** now displays *Connected as* Procore User <username>.
- 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.
- d. Do one of the following:
 - Select Continue to Configuring Procore Settings, or
 - Select **Cancel** to discontinue setting up the connection at any time, and return to the **Data Management** page.



Configuring Procore Settings

As a Construction and Engineering Intelligence 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.



The following media is not fetched due to Oracle Integration Cloud security restrictions: photos greater than 60 MB, and photos without Content Type.

Prerequisite

You have successfully completed the step, Adding a Procore Connection.

Procedure

- 1. On the **Procore Settings** page, select the historical media data to be fetched from Procore to Construction and Engineering Intelligence:
- 2. In the **Historical Data** field, select the length of the historical data, and click **Continue**.
 - All (This option fetches all the historical data available in Procore for the chosen project.)
 - 60 Days
 - 30 Days
 - 7 days
 - None (Only the data captured after a successful connection is brought into Construction and Engineering Intelligence)
- Select the projects to fetch from Procore as follows:
 - a. Select a company from the Select Procore Company drop-down list. All projects accessible to you in Procore display by default.
 - b. Use the **Search** bar to focus your search on a subset of Procore projects.
 - c. Select the check box next to the required Procore project to fetch its media data into Construction and Engineering Intelligence. You must select at least one project.
 - d. Click **Continue**. The **Ingestion Schedule** page is displayed.
- 4. On the Ingestion Schedule page, click Done to:
 - complete the Procore configuration setup in Construction and Engineering Intelligence
 - run a data ingestion immediately.
 - set an automatic data ingestion schedule daily at 12:00 AM UTC.
- 5. Select any of the following actions:
 - View the daily ingestion schedule automatically created for Procore on the **Ingestion Schedule** page.



- Run on-demand ingestion. See Running an Ingestion Manually.
- View the new Procore connection created on the Data Management page.

Connecting with Autodesk

To set up a connection with Autodesk, complete all the steps in sequence using the **Add New Connection** wizard.

Adding an Autodesk Connection

As an administrator, you can set up a connection to fetch image and related data from Autodesk Construction Cloud and Autodesk BIM 360.



Each administrator user can have only one connection with Autodesk. Construction and Engineering Intelligence supports having more than one connection to Autodesk, but each connection must made by a different Construction and Engineering Intelligence administrator user.

To add a connection to Autodesk:

- 1. From the Navigation Menu, select Administration, then Data Management.
- 2. On the **Data Source** page, from the **Add new connection** drop-down list, select **Autodesk** and click **Continue**.
- On the Connection Details page, sign in with your Autodesk credentials:
 - a. In the **Username** field, enter your unique user name used in Autodesk.
 - b. In the **Password** field, enter your alphanumeric password.
 - c. Click Validate to connect with Autodesk.



When you successfully connect to Autodesk, only the **Disconnect** button is enabled and the **Connection Status** now displays *Connected as Autodesk User <username>*.

- **d.** Perform any of the actions listed below:
 - Select Continue to Configuring Autodesk Settings.
 - Select Cancel to discontinue setting up the connection, and return to the Data Management page.

Configuring Autodesk Settings

As an administrator, select Autodesk projects to fetch media and its associated data.

Prerequisite

You have successfully completed the step, Adding an Autodesk Connection.



Procedure

- On the Autodesk Settings page, select the historical media data to be fetched from Autodesk to CIC
- 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
- To select Autodesk projects:
 - a. Select an account from the **Select Autodesk Account** drop-down list.

All projects associated with the selected account and the projects that the logged in Construction and Engineering Intelligence administrator has access to are display by default.



You must have **Build** permission in Autodesk for the projects you select to successfully complete the integration.

- b. (Optional) Use the **Search** bar to focus your search on a subset of Autodesk projects.
- **c.** Select the check box corresponding to each Autodesk project to fetch its media data into Construction and Engineering Intelligence. You must select at least one project.

Projects that have already been selected for Construction and Engineering Intelligence by other administrators appear disabled.

d. Click Continue to Creating an Initial Ingestion Schedule 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 Construction and Engineering Intelligence.



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

Prerequisites

You have completed the following steps successfully:

- Adding an Autodesk Connection
- Configuring Autodesk Settings



Procedure

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

- On the Ingestion Schedule page, click Done to:
 - complete the Autodesk configuration setup in Construction and Engineering Intelligence
 - set an automatic data ingestion schedule daily at 12:00 AM UTC
- 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.

Configuring P6 Connection

Before scheduling ingestion runs for P6 data, you will need to select codes, User Defined Fields (UDF)s, configure P6 settings and select an ingestion schedule.



This topic is applicable only if your organization has purchased the Construction and Engineering Analytics module.

Configuring Codes

- 1. From the Navigation Menu, select Administration, then Data Management.
- On the Data Source page, from the Actions Menu associated with the P6 connection, select Edit.
- 3. From the Edit P6 Connection page, click Start.
- On the Codes page, click Add Code and select Project Code, Activity Code, or Resource Code.
- From the Add Project Codes, Add Activity Codes, or Add Resource Codes drawer, select the codes you want to add and click Add.
 - You can search for a specific code using the search bar.
 - Use the Move Up and Move Down buttons to change the order of the codes.
 - Use the Remove button to remove codes.
- 6. Click **Continue** to move to the next step in the workflow to add User Defined fields.

Selecting User Defined Fields

On the **User Defined Fields** page, you can select the User Defined Fields (UDF) you want to include.

- 1. From the User Defined Fields page, select a tab:
 - Project Activity



- Resource Assignment
- Resource
- WBS
- 2. Click Add UDF, and select the UDF type you want to include: Cost, Date, Text, Indicator, or Number.
 - You can search for a specific UDF using the search bar.
 - Use the Move Up and Move Down buttons to change the order of the UDF.
 - Use the Remove button to remove UDFs.
- 3. Select the UDF you want to migrate and click Add.

Note:

A maximum of 240 codes is supported for each area (Project, Activity, and Resource). A limit of approximately 220 UDFs for each supported level (Project, WBS, Activity, Resource, and Resource Assignment) and data type (Cost limit is 220, Non-Cost limit is 220, and a combination comprising Date, Text, and Integer of 220) is allowed. The limit for Indicator type UDFs for each level is 40. For example, you can select a total of 220 UDFs that includes Project Cost UDFs, WBS Cost UDFs, Activity Cost UDFs.

Click Continue to configure settings.

Configuring Settings

On the **Settings** page you can choose the settings for the P6 data source.

- 1. From the **Setting** page, select each checkbox to choose your settings:
 - Turn on all history checkbox: Enabled by default. Controls the history tables.
 - Enable spread snapshot history checkbox: Controls the use of spread snapshot history in the advanced analytics dashboard.
 - Enable slowly changing dimensions: Enabled by default. Slowly changing
 dimensions (SCDs) are used to capture the change history of dimension fields. If SCD
 is enabled, any change to the field will add a new row to capture the change in the
 data warehouse. If SCD is disabled, a new row will not be added if a change is made
 to that field.
 - Enable relationship load: Enabled by default. Controls the ETL from processing
 activity relationships. De-select the checkbox to run the ingestion without processing
 activity relationship load.
 - Load all hierarchy codes: Enabled by default. Builds code hierarchies. When enabled, the code hierarchies are built with all codes that come from the source. When the checkbox is de-selected, the hierarchies are built with codes from configStar.
 - Include inactive resources: Controls resource filtration. When the checkbox is selected, Primavera Data Warehouse tables will not filter out inactive resources. If inactive resources are included, then spread data and other dimension tables will also be included. You may not need to process this extra resource assignment information.



- Enable resource and role limits: Enabled by default. Controls resource and role
 utilization scripts. When the checkbox is selected, the role and resource utilization
 scripts is turned on.
- Enable resource assignment period actuals: Enabled by default. Controls the display of past period actuals for resources.
- Click Continue to move to the next step in the workflow to create an ingestion schedule.

Setting up an Ingestion Schedule

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

To set up ingestion schedules:

- 1. On the Ingestion Schedule page, click Add Schedule.
- 2. In the Add Schedule drawer, 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 and Time field, click the Calendar icon and select a date for the first schedule run. Click on the hours and minutes to select a time.
 - c. In the **Frequency** 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*.
- Click Add Schedule to create an ingestion schedule.

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

Configuring Unifier Connection

Before scheduling ingestion runs for Primavera Unifier data, you will need to configure Unifier settings and select an ingestion schedule.



This topic is applicable only if your organization has purchased the Construction and Engineering Analytics module.

- 1. From the \equiv Navigation Menu, select Administration, then Data Management.
- On the Data Source page, from the Actions Menu associated with the Unifier connection, select Edit.
- From the Edit Unifier Connection page, click Start.
- 4. Select each checkbox to choose your settings:
 - Project Shell History Level: Controls project shell history levels.
 - BP Data History Level: Controls business process (BP) data history level. Select the frequency of BP history tables to capture the history of BP dimensions.
 - Level Data History Level: Controls level history for (Facility and Asset Management).



- Cash Flow and Cost Sheet Data History Level: Controls the cash flow history and cost sheet history tables.
- Space Data History Level: Controls space history tables.
- Store Unifier history: Controls Unifier history tables. When the checkbox is selected, the system keeps the history tables running. To disable all history tables, leave the checkbox deselected.
- Advanced Settings: Enable Unifier slowly changing dimensions: Controls the
 capability to see how business process has changed over time. A business process
 history can then be generated weekly or monthly. Select the checkbox to captures
 history for all projects and business processes. This includes non-dynamic business
 process related dimensional data, and dynamic dimensional data for business process
 (UDFs) metadata. Deselect the checkbox to disable business process history.
- Use P6 project name for Unifier project: Controls the source that will be used for naming a Unifier project. If the Unifier project ID is identical in P6 and Unifier, then the project name from P6 will be used for the Unifier project. If the checkbox is deselected, the system uses the project name from Unifier.
- 5. Click **Continue** to proceed to the next step in the workflow where you can configure the ingestion schedule. See Setting up an Ingestion Schedule.

Administering Ingestion Tasks

You can add or update ingestion schedules, or run ingestions manually

Running an Ingestion Manually

To run the ingestion immediately:

- From the Navigation Menu, select Administration and then select Data Management.
- 2. On the **Data Management** page, click the **Action Menu** for a specific data source, and select **Ingestion**.
- 3. On the **Ingestion** page, click **Run**.
 - For P6 data source, you can choose Run On-Demand to refresh the data for the Activity On-Demand subject area in between schedule ingestions.
- 4. In the Run a new Ingestion? dialog box, click Run to reconfirm.

Select **Cancel** if you want to discontinue the configuration setup.

The ingestion run will be added to the queue.



Publication services must run in the data source prior to any changes being captured by the ingestion process.



Adding Ingestion Schedules

Adding ingestion schedules for a data source.



This topic is applicable only if your organization has purchased the Construction and Engineering Analytics module. You can create a maximum of three schedules for each data source.

- 1. From the Navigation Menu, select Administration and then select Data Management.
- On the Data Source page, from the Actions Menu associated with your data source, select Ingestion.
- 3. On the Ingestion page, click Add Schedule.

The Add Schedule drawer is displayed.

- a. In the **Schedule Name** field, enter a name for the ingestion schedule. For example, *Weekly Run*.
- **b.** In the **Start Date and Time** field, click the **Calendar** icon and select a date for the first schedule run. Click on the hours and minutes to select a time.
- c. In the **Frequency** 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*.
- Click Add Schedule to create an ingestion schedule. The Ingestion page displays a new tile with the specified Schedule Name.

Editing an Ingestion Schedule

Modify an ingestion schedule for a data source.



This topic is applicable only if your organization has purchased the Construction and Engineering Analytics module.

- From the Navigation Menu, select Administration and then select Data Management.
- On the Data Source page, from the Actions Menu associated with your data source, select Ingestion.
- On the Ingestion page, click Edit Schedule displayed on the schedule tile you want to modify.

The **Edit Schedule** drawer is displayed.



- **a.** In the **Schedule Name** field, enter a name for the ingestion schedule. For example, *Weekly Run*.
- **b.** In the **Start Date and Time** field, click the **Calendar** icon and select a date for the first schedule run. Click on the hours and minutes to select a time.
- c. In the **Frequency** 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*.
- 4. Click **Update** . The tile on the **Ingestion** page is updated with the new schedule.



4

Administering Users

The **User Management** module allows you to grant users access to Construction and Engineering Intelligence, and manage their roles.

Accessing the User Management Module

To access the User Management Module:

- 1. From the Navigation Menu, select Administration.
- 2. Click User Management.



The Administration module is displayed only for users with Administrator role.

About the User Management Page

User Management CEI 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 Construction and Engineering Intelligence.

From this page you can:

- View users with access to Construction and Engineering Intelligence.
- Edit a user's profile.
- Create a Construction and Engineering Intelligence-only user.
- Change a user's role in Construction and Engineering Intelligence.
- Remove or add user access to a data source.



All users who are brought over from various source applications via ingestion are by default given access to Construction and Engineering Intelligence, and are assigned the **Consumer** role.

User Management Non-CEI Users

It displays all users who have been brought over from various source applications via ingestion.

Note:

This section is applicable only if your organization has purchased the Construction and Engineering Analytics module.

To access the **Non-CEI Users** view: from the **CEI Users** drop-down list, select **Non-CEI Users**.

From this page you can:

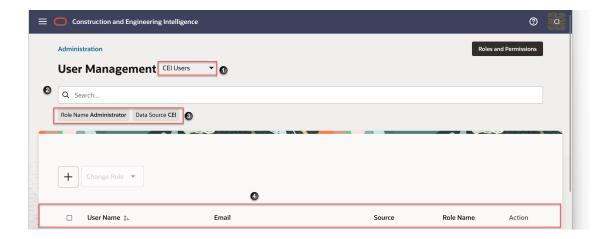
- View users who have not yet been granted access to Construction and Engineering Intelligence. View the username, email ID and the data source the user can access.
- Search for users, or use the smart filters to view users from a specific data source. For more information, see topic Filtering, Sorting, and Searching for Users
- Grant users access to Construction and Engineering Intelligence by assigning them to a role.

As a cloud administrator, you can assign users from P6 EPPM, and Primavera Unifier access to Construction and Engineering Intelligence.

User-level data access for Construction and Engineering Intelligence is governed by the following criteria:

- User must be granted access to at least one Construction and Engineering Intelligence Data Source Cloud Service.
- For each applicable Construction and Engineering Intelligence Data Source Cloud Service granted access, the following applies:
 - If the user is licensed in the source application, Construction and Engineering
 Intelligence data access matches the source application data access privileges of each
 user unless further restricted within Construction and Engineering Intelligence.
 - If the user is not licensed in the source application, the user has access to all source application data transferred to Construction and Engineering Intelligence unless further restricted in Construction and Engineering Intelligence.

Filtering, Sorting, and Searching for Users





Screen Elements	Description
1	Toggle between the CEI Users view and the Non-CEI Users view.
	Note: This option is displayed only if your organization has purchased the Construction and Engineering Analytics module.
2	Search Bar: Look up users by typing parts of their user name or email ID in the Search Bar to find a specific user.
3	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 source. 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.
4	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 Construction and Engineering Intelligence. By assigning roles to users you can give them access to Construction and Engineering Intelligence.

Roles are used to specify what a user can do and the modules they can access. You can either assign users to one of the preconfigured standard roles or create custom roles.

The preconfigured standard roles are:

- Administrator: User can access all Admin and Construction and Engineering Intelligence workspace modules.
- Consumer: User can access all Construction and Engineering Intelligence workspace
 modules. Users with access to the Construction and Engineering Analytics module can
 view all content, workbooks, and dashboards in Construction and Engineering Analytics.
 Security is applied to the data seen for users coming from a source application
- Creator: User can access the Analytics workspace module and is configured with a creator role in Oracle Analytics Cloud (OAC). This role is displayed only if your organization has purchased Construction and Engineering Analytics.

Viewing Roles

To view the configured roles:

From the Navigation Menu, select Administration, and then select User Management.



Click Roles and Permissions.

All the configured roles are displayed.

Click the View Role button next to a role to view details of the selected role.

Creating Construction and Engineering Intelligence-Only Users

Construction and Engineering Intelligence-only users are users that are directly added in Construction and Engineering Intelligence and are not ported from any source application.

Creating a Construction and Engineering Intelligence-only user allows you to give users access to the data in Construction and Engineering Intelligence without giving them access to the source application.



Users can see all the data in the data sources they are given access to.

To create a Construction and Engineering Intelligence-only user:

- From the Navigation Menu, select Administration, and then select User Management.
- On the User Management CEI Users page, click Add User.
- 3. In the Add User panel enter the following information:
 - a. In the User Details tab, enter the email ID, user name, first name, last name, and phone number.
 - b. Click 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. Click Save.

Modifying Access to a Data Source

To modify user access to a data source.

- From the Navigation Menu, select Administration, and then select User Management.
- On the User Management CEI Users page, use the check box to select users.
- 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.

- From the Navigation Menu, select Administration, and then select User Management.
- 2. On the **User Management CEI 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.
- Click Next.
- 5. In the Role & Data Source tab, select a role from the drop-down list.
- Modify the data sources the user can access.
- Click Save.



About Managing Personal Information

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 and Engineering Intelligence.

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 and Engineering Intelligence.

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

Construction and Engineering Intelligence consumes data from source applications and makes it available to Construction and Engineering Intelligence 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 Construction and Engineering Intelligence
- understand the responsibilities with regard to data protection and security

Cookie Policy in Construction and Engineering Intelligence

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/saasonline-csa-us-1894130.pdf
- Oracle Privacy Policy https://www.oracle.com/legal/privacy/services-privacy-policy.html
- Oracle Data Processing Agreement https://www.oracle.com/corporate/contracts/cloudservices/

Your Responsibility

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 Construction and Engineering Intelligence 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.



6

Environment Status

The Oracle Construction and Engineering Intelligence Status Page provides updates on the events occurring in the data center where your Construction and Engineering Intelligence instance is hosted.

You can view events and updates directly on the status page or by subscribing to alerts. You can access the Status Page here:

https://statuspage.gbucnss.oci.oraclecloud.com/status/cegbu_cic_ng_prod_status/

What events do we communicate?

We communicate the following events:

- Planned maintenance announcements.
- Reductions in system responsiveness.
- Unplanned outages resulting in an instance becoming unavailable.

What does an event's status indicate?

Maintenance announcements will typically have the following status:

Scheduled: The maintenance event is scheduled for a specific date and time. Any
outages or performance impact will be communicated to customers ahead of time.

An unplanned performance issue or outage will typically move through the following statuses:

- Investigating: Teams are actively investigating but the cause has not yet been identified.
- Identified: The cause and resolution action have been identified.
- Monitoring: A fix has been applied and is being monitored to ensure the system is operating as expected.
- Resolved: The service is back online and operating normally.

After each unplanned event is resolved, our teams will conduct an investigation to determine the cause, assign corrective actions, and ensure efforts are made to prevent the issue from happening in the future.

At what frequency is the service updated?

See Planned Maintenance Periods.

For all other events, we notify the customers as soon as the information is available and provide updates as necessary.

How can I Subscribe to et Updates

To subscribe to the Status Page to receive updates in email or text messages:

- On the Status page, click Subscribe to updates.
- On the Subscribe to updates dialog box, select the Email or SMS tab, complete the fields, and then select Subscribe to updates.

- Depending on your selection, open the email or text message and confirm your subscription.
- 4. 4) For email subscriptions, the **Confirm** button in the email opens the **Manage Subscriptions** page, ensure only the data center where your instance of Construction and Engineering Intelligence is hosted is selected, and then select **Update Subscription**.

To manage or cancel your subscription:

- Email: Select Manage your subscription from a Status Page email alert. On the Manage Subscriptions page, make changes to your data center selections and select Update Subscription, or select Cancel Subscription.
- **SMS**: Send the unsubscribe code you received in the last text message you received for the Status Page.

Planned Maintenance Periods

Oracle reserves specific maintenance periods for changes that require the Cloud service to be unavailable to customers. These maintenance periods are divided into two main types: Application maintenance and Core system maintenance.

Application Maintenance

Construction and Engineering Intelligence may be updated up to four times a month. New features and improvements are typically released at the end of the first week of every other month. Service packs that contain additional fixes are typically released at the end of each remaining week. Exceptions to this schedule may occur. These updates take place during planned maintenance windows. For all other events, we notify the customers as soon as the information is available and provide updates as necessary.

Core System Maintenance

For any Core system maintenance announcements please, refer to the Construction and Engineering Intelligence Status page:

https://statuspage.gbucnss.oci.oraclecloud.com/status/cegbu cic ng prod status/

For additional information on maintenance, see the Oracle Cloud Hosting and Delivery Policies and the Global Business Units Cloud Services Pillar documents.

