 **Viewpoint**
Jobpac Connect[™]

Menu Maintenance
Function Guide
Version: 1.0

Document Control Table

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Approved or authorised by	
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Commercial in Confidence	

Change History

Version	Date	Author	Description of Changes
1.0	30/09/2021	DMB	Initial Release

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Introduction

A standard menu structure is provided to all new Jobpac Clients. This menu structure can be copied and then modified to meet the specific needs of clients. This should always be done, and users assigned the User Specific menu, not the original. Jobpac may update the standard menu from time to time with new or changed menu items. These new or changed items can then be transferred to the user specific menu by the client Jobpac Administrator, or by request to a viewpoint consultant.

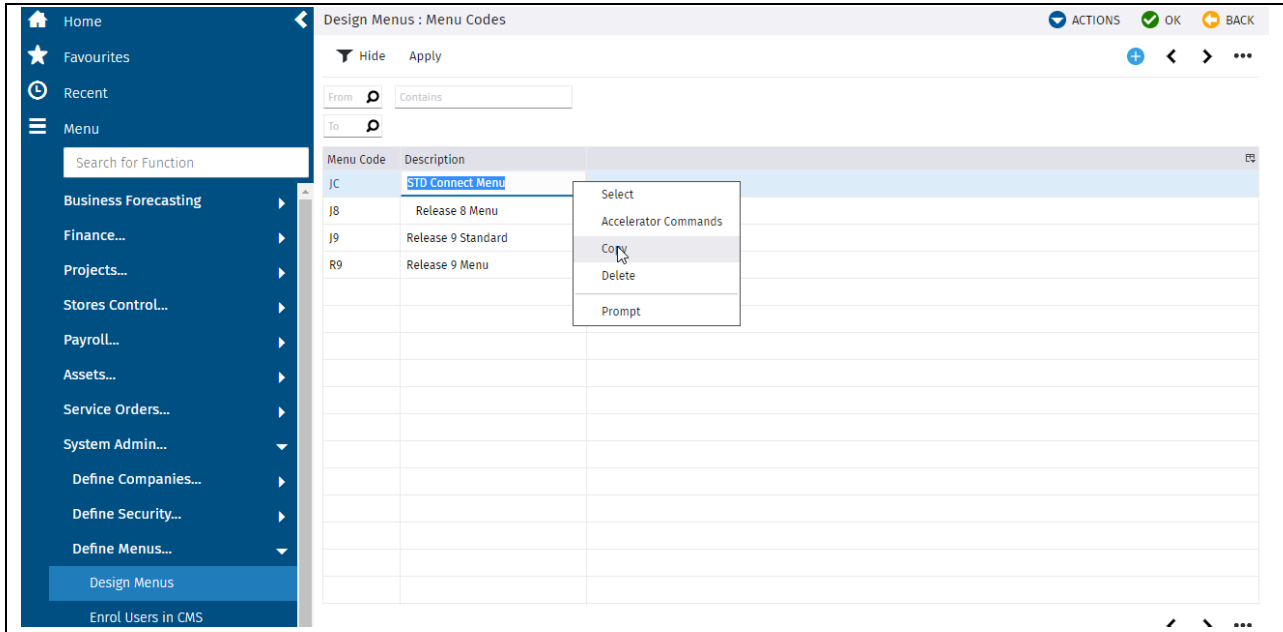
Each menu is assigned a two character code identifier. E.g. the Standard Jobpac Menu is JC. The client specific menu could be, say, JF.

Menu Maintenance

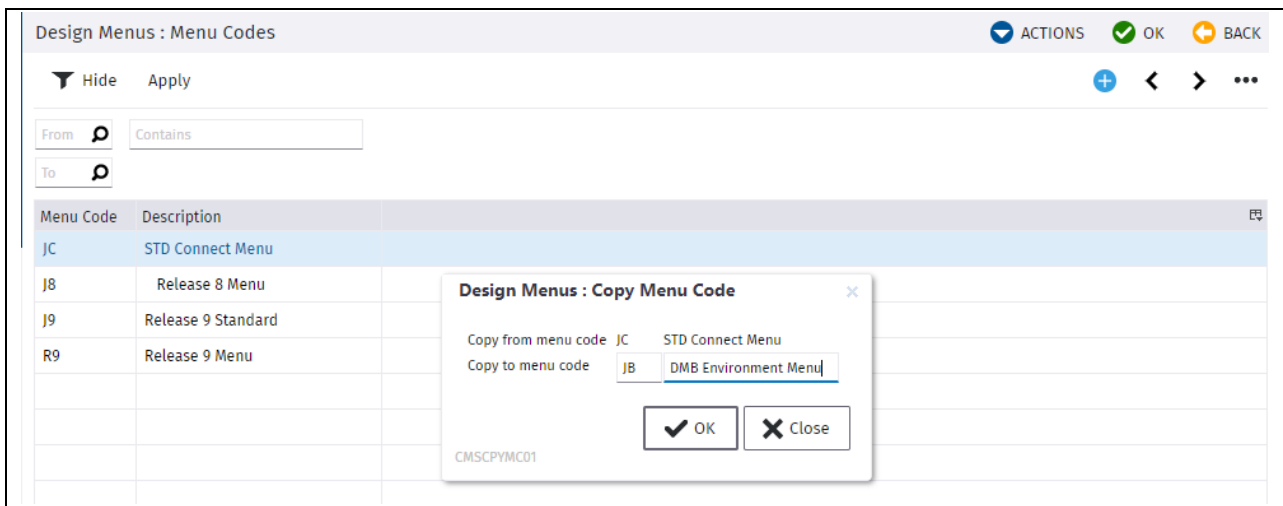
Copying, Viewing and Printing a Menu structure

Copying a Menu

To copy a menu in total, select menu option '**Design Menus**', then pick the one you want to copy, and select **Copy**.



Type in the new Menu Code, and a name for the menu. Select OK, and the menu is copied.



Menu Maintenance

This new menu is an exact copy of the old menu. It includes the same security levels as the original menu (for information on security levels see later in the document). It can be assigned to users.

Design Menus : Menu Codes

Hide Apply

From Contains To

Menu Code	Description
J8	DMB Environment Menu
JC	STD Connect Menu
J8	Release 8 Menu
J9	Release 9 Standard
R9	Release 9 Menu

Viewing a Menu

To see all options on a menu, perform a right mouse click on the menu you want to view and take Select. This displays the menu options. All menu have a three digit menu number. A further select using **Entries** of one of these displays the specific options for that menu.

Design Menus : Menus

Menu Code J8 DMB Environment Menu

Hide Apply

From Contains To

Size: Small Medium Large

Menu No.	Description	Level	Size	Security Level
100	Business Forecasting	1	M	
101	Contract Performance	1	M	
105	Taxable payments	3	M	
110	Enquiries & Aud.Reps	2	M	
125	Job Reports	3	L	
127	Cost Centre Reports	3	M	
128	Detail Cost Reports	3	M	
130	PAYMAS Interface	2	M	
150	Trading Summary	2	M	
160	BFM Reports...	2	M	
161	CPT Reports..	2	L	
170	BFM Consolidated Rep	3	L	
171	CPT Consolidated Rep	3	L	
180	BFM Utilities	2	L	
181	CPT Utilities	2	L	
182	More BFM Utilities	3	L	

Context menu for 'Cost Centre Reports':

- Entries
- Expand to Menu View
- Delete
- Prompt

Menu Maintenance

E.g. Say 127 Cost Centre Reports is selected, the following is displayed. This is where you can add or modify menu options.

Design Menus : Maintain Entries ACTIONS OK BACK

Menu Code JB DMB Environment Menu
Menu Number 127 Cost Centre Reports Level 3 Size L

Ent No	Type	Opt No	Description	Command	Parameters	Security Level
1	P	1	Cost Comparison & Forecst	JOBREPBC		
2	P	2	Cost Code Status	BAPRJCP		
3	P	3	Labour Summary	CLABRSMP		
4	P	4	Budget Analysis	CCBARPP		
5	P	5	Cost Centre List	CTRLSTP		
6	P	6	Project Control	PRCNRPP		
7						
8						
9	P	9	Projected Costing	CPRJCSTP		
10	P	10	Forecast Cost	CFRCSTP		
11	P	11	Cost Code Status incl Est	BCCSTSP		
12	P	12	Cost Summary - Periods	CCSMPERRPP		
13						

Printing a Menu Structure

Often the easiest way to see all on a menu structure is to display it as a pdf report. Go to 'List Menu Structure', enter a menu code, and display in a pdf.

Home Favourites Recent Menu

Search for Function

- Business Forecasting
- Finance...
- Projects...
- Stores Control...
- Payroll...
- Assets...
- Service Orders...
- System Admin...
- Define Companies...
- Define Security...
- Define Menus...
- Design Menus
- Enrol Users in CMS
- List Menu Systems

Menu System Listing

Menu System Code JB ALL

From Menu Number

To Menu Number

Report Option PDF Excel

View the report

First page of pdf displayed below

VIEWPOINT		QMS - Menu System Listing			Page 1	Sec Lv1
OMSLST MC No.	#	Description	Command	Parameters		
JB		DMB Environment Menu				
100		Business Forecasting				
	1	1 Contract Valuation	BFMJBMNTP			
	2	2 Unsecured works	USPRJMNT			
	3	3 Non Project Operation	BFMLVLMNTP			
	4	4 Trading Summary...	Menu 150			
	5	5 Reporting	Menu 160			
	6	6 Consolidated Reports...	Menu 170			
	7	7 BFM Utilities...	Menu 180			
	9	9 BFM Utilities...	Menu 180			
101		Contract Performance				
	1	1 Contract Valuation	BFMJBMNTP			
	6	6 Reporting...	Menu 161			
	7	7 Consolidated Reports...	Menu 171			
	9	9 Utilities...	Menu 181			
105		Taxable payments				
	1	1 Set TPR Year	TAXPAYTMP			
	2	2 TPR download of creditors	TAXPAYDWLP			
	3	3 TPR Upload of creditors	JUUPLOADIP	'TAXPAYMNT'		
	4	4 TPR Enquiry/Main-Job	TAXPAYMNP	'Y'		
	5	5 TPR Enquiry/Maint	TAXPAYMNP	'Y'		
	6	6 TPR Payer Maintenance	TPRPYRMNP			
	7	7 TPR ATO Extraction	TPROUTSELP			
110		Enquiries & Aud.Reps				
	1	1 GL Enquiry	GLENQP			
	2	2 AP Enquiry	APTRIQP			
	3	3 AR Enquiry	ARTRIQP	*NONE		
	4	4 S/C Enquiry	SOENQP			
	5	5 Job Enquiry	JOENQP			
	6	6 Site based AP Enquiry	SITENQP			
	7	7 P/O Enquiry	POENQP			
	8	8 Variation Enquiry	HVRENQP			
	9	9 Creditors Audit Report	CREDAUDRPP			
	10	10 System Audit Reports	SAUBNDP			
125		Job Reports				
		Recommended				
	1	1 Project Summary Report	PRJSMRPTP			
	2	2 Summary Project Status	SMPRSDP			
	3	3 Project Costs - Cost Type	PRSTRAP			
	4	4 Project Status Report	PRSTRPP			
	5	5 Client Forecast Cost	CFFCSTRPTP			
		Other Reports				
	6	6 Job Projected Costing	JPRJCSTP			
	7	7 Contract Control	JCONCTP			
	8	8 Job Liquidity	JLIQIDP			
	9	9 Liquidity and F/C Margin	JLIQMRGP			
	10					
	11					

Menu Maintenance

Giving Users Access to Menus

Every User of Jobpac must have access to a menu. To assign access go to 'Enrol Users in CMS'

Menu User Maintenance ACTIONS OK BACK

License Type: *NAMED

	Full	BI
Licenses	999	999
Users	3	

Hide Apply + < > ...

From: Contains: Frm From Frm From Frm From Frm From Y

To: To To To To To To To To To To To (Y/N/) (Y/N/)

User Id	Name	Sec Level	Menu Code	Opt 1	Opt 2	Opt 3	Opt 4	Opt 5	Opt 6	Opt 7	Opt 8	BI User	Base On User	Inc In Lic
BOUDAM2	Damien Bourke 2	9	JC	100	200	300	400	500	600	800	900	N		Y
BOUDAM3	Damien Bourke 3	9	JC	100	200	300	400	500	600	800	900	N		Y
KWOOHS1	Oh Soo Kwon - Jobpac	9	JC	100	200	300	400	500	600	800	900	N		Y

Add their Userid and name at the bottom of the list, add a security level (see later), add the menu Code, and then add the Specific Modules a user has access to.

The Standard Ones are:

- 100 Business Forecasting
- 200 Finance
- 300 Projects
- 400 Stores
- 500 Payroll
- 600 Assets
- 700 Human Resources
- 800 Service Orders
- 900 System Administration

There are only 8 main options available on this screen, if more are required, use RMB and Select 'More Details'. This provides a further 8 options

Menu User Maintenance More Details ACTIONS

User: KWO0HS1 Oh Soo Kwon - Jobpac
Menu Code: JC STD Connect Menu

Menu 01	100	Business Forecasting
Menu 02	200	Finance...
Menu 03	300	Projects...
Menu 04	400	Stores Control...
Menu 05	500	Payroll...
Menu 06	600	Assets...
Menu 07	800	Service Orders...
Menu 08	900	System Admin...
Menu 09		
Menu 10		
Menu 11		
Menu 12		
Menu 13		
Menu 14		
Menu 15		
Menu 16		

Status: Active Deactivated

Content Viewer Administrator
 Content Viewer Replacement Capability
 Enforce MFA
 SSO User

There are additional options on this screen

1. Content Viewer Administrator
If Yes is ticked, then this user can delete any document from the Content Viewer. Without this a user can only delete documents they added to the Content Viewer.
2. Content Viewer Replacement Capability
If Yes is ticked, then this user can replace documents in the content viewer with an updated version of the document.
3. Enforce MFA.
If Yes is ticked, this user must use Multi Factor Authorization every time they sign on to Jobpac.

SSO User is for later use regarding Single Sign on.

Adding New Items to a Menu

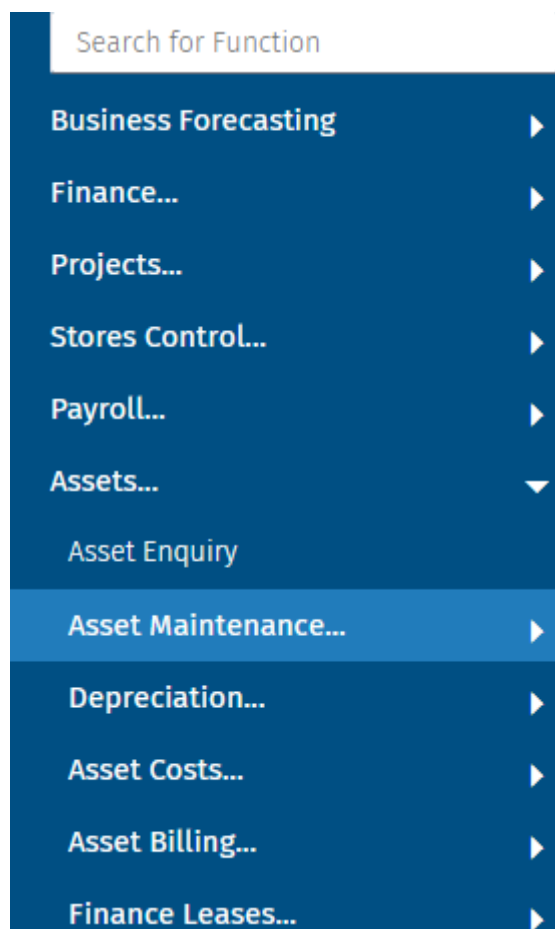
Sometimes Viewpoint make new menu options available to clients. The release notes will provide information on the new program name and any parameter information.

Assessing Where to Put the New Menu Item(s)

Review you own menu structure or run a report to display the full menu structure for the menu code you are using.




Remember, if your company is using more than one menu code you may need to add the items to multiple menu codes.

As an example two new menu options for Asset uploads were made available. Go to the Asset menu structure and decide where you want the new item to go. There is a menu called Asset Maintenance, this seem like a likely place.



Menu Maintenance

Go to 'Asset Maintenance' menu item for the menu code you are using and find that menu. See Menu 670.

Design Menus : Maintain Entries




Menu Code JB DMB Environment Menu
Menu Number 600 Assets... Level 1 Size L

Ent No	Type	Opt No	Description	Command	Parameters	Security Level
1	P	1	Asset Enquiry	FAMAINTP	"	
2	M	2	Asset Maintenance...	670		
3	M	3	Depreciation...	620		
4	M	4	Asset Costs...	630		
5	M	5	Asset Billing...	612		
6	M	6	Finance Leases...	650		
7	M	7	Operating Leases...	640		
8	M	8	End of Month...	690		
9	M	9	Other Asset Reports...	682		
10	M	10	Asset Configuration...	605		

Go to menu 670 and display it. Add the new menu item.

Type = P




Opt No = 9

Menu description

Command – As provided by Viewpoint

Parameter – As provided by Viewpoint. (Most menu item do not have a parameter.)

Click OK to Save.

Design Menus : Maintain Entries




Menu Code JB DMB Environment Menu
Menu Number 670 Asset Maintenance Level 2 Size L

Ent No	Type	Opt No	Description	Command	Parameters	Security Level
1	P	1	Add an Asset	FANXE1R	"	
2	P	2	Add a Managed Asset	FARPE1R	"	
3	P	3	Change Asset Classific'n	FAYZDFR	" "	
4	P	4	Delivery Dockets	FAVMDFR	"	
5	P	5	Return Dockets	FAVWDFR	"	
6	P	6	Valuation Bulk Entry	FAXXEFR	"	
7	M	7	Asset Renumbering...	673		
8	P	8	Upload Meter Readings	JUUPLOAD2	'METERREAD' 'E'	
9	P	9	Upload New Assets	JUUPLOAD1P	'FAASSET'	
10						

Menu Maintenance

Menu Security

Each menu item or a whole menu can be assigned a security level of 0 to 9. Each user can be assigned a security level. If the security level of a user is higher than or equal to that of a menu item, then they will see that item, otherwise they will not see the item.

Below BOUDAM2 is assigned a security level of 4. He can only see menu items with a level of 4 or less.

DMB Holding company

Menu User Maintenance ACTIONS OK BACK

License Type *NAMED

	Full	BI
Licenses	999	999
Users	3	

Hide Apply + < > ...

From Contains Frm From Frm Frm Frm Frm Frm Frm = Y
To To To To To To To To To To (Y/N /) (Y/N /)

User Id	Name	Sec Level	Menu Code	Opt 1	Opt 2	Opt 3	Opt 4	Opt 5	Opt 6	Opt 7	Opt 8	BI User	Base On User	Inc In Lic
BOUDAM2	Damien Bourke 2	4	JC	100	200	300	400	500	600	800	900	N		Y
BOUDAM3	Damien Bourke 3	9	JC	100	200	300	400	500	600	800	900	N		Y
KWOOHS1	Oh Soo Kwon - Jobpac	9	JC	100	200	300	400	500	600	800	900	N		Y

For Example, the menu options 2 and 3 have a security level of 7. So BOUDAM0 will not see those menu items

DMB Holding company

Design Menus : Maintain Entries ACTIONS OK BACK

Menu Code JB DMB Environment Menu
Menu Number 100 Business Forecasting Level 1 Size M

< > ...

Ent No	Type	Opt No	Description	Command	Parameters	Security Level
1	P	1	Contract Valuation	BFM BMNTP		
2	P	2	Unsecured Works	USPRJMNT		7
3	P	3	Non Project Operation	BFMLVLMNTP		7
4						
5	M	5	Trading Summary...	150		
6	M	6	Reporting...	160		
7	M	7	Consolidated Reports...	170		

Menu Maintenance

Licence Counts

At the top of the Menu User Maintenance screen are listed licence counts for the various modules that client has.

Menu User Maintenance
ACTIONS OK BACK

License Type	*NAMED	Full	BI	Field
Licenses		6	6	7
Users		6	6	

Hide Apply
+ < > ...

From Contains Frm From Frm Frm Frm Frm Frm Frm Frm Frm Frm =

To To To To To To To To To To To (Y/N/) (Y/N/)

User Id	Name	Sec Level	Menu Code	Opt 1	Opt 2	Opt 3	Opt 4	Opt 5	Opt 6	Opt 7	Opt 8	BI User	Base On User	Inc In L _{eq}
ALNPETO	Peter Alnas - Jobpac	9	JC	100	200	300	400	500	600	800	900	N		N
BADLES0	Lesley Badelles - Jobpac	9	JC	100	200	300	400	500	600	800	900	N		N

Some users, e.g. Viewpoint Support Staff have userids, but they are no part of the licence count. They have column 'Inc In L' set to N.