Field View Integration Reference Guide

Version: 1.2

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
V1	05/07/2017	AT	Include Timesheet Integration
V1.0	26/10/2017	BA	Reformat and Rework Commence Defect Integration
V1.1	15/03/2018	AT	Add PO Integration and Organisation Mapping
V1.2	17/05/2018	AT	Update to Remove Organisation Mapping Notes

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Introduction

Scope

The purpose of this document is to assist users and consultants in setting up and using the Jobpac Connect - Field View Integration. Integration Setup steps are covered in this document that are common to all Field View integrations. Operational usage that specifically relates to the Timesheets Interface, the Defects/Site Instructions Interface and the PO Interface is also covered.

The Document Sections include…

- Integration Setup. Including Recommended Setup steps and also Setup details.
- Integration Operations. Including how various integrations between Field and Office are used.
- An Appendix that includes Technical configuration steps that are normally carried out by a Jobpac Consultant.

Document conventions

The following table contains the naming conventions, typographical conventions and symbols used in this document.

example.dat	Filenames are displayed in courier font to identify the filename from the body of the text.
[Enter]	Square brackets and bold typeface are used to indicate a specific key to press on the keyboard.
Type in 'XYZ' into the Name field.	Field names are highlighted by the use of bold text.
Select the *File* menu	All buttons, field icons, menus and checkboxes are displayed in italics.
Type in 'ABC' in the XYZ field	Single quotes are used to identify information in the instructions that is to be entered by the user.
Value between '1' and '99'.	Single quotes are used to identify possible field values.
One to nine, 10 to 1,000.	All numbers below ten are written as text unless a value to be entered. Numbers 10 or greater are written as numerals unless starting a sentence. Numeric field values are displayed in single quotes.
File>Save As>Filename>OK	Command paths are displayed using italic typeface and forward chevrons (>).
The *Register Invoices* screen displays.	Bolded Italic typeface is used to refer to all screens, modules and windows. The first appearance of a screen is referred to in the present tense and the sentence finished with the word 'displays'.
(field) ►	Signifies that a pop-up window is associated with a field.
►(action)	Signifies an action undertaken in a screen *Actions* menu or a menu selection.

Terms and definitions

The following table contains the terms and definitions used in this document.

Term	Definition
C	This denotes a non-enterable field.
E	This denotes an enterable field.

Terms and Definitions table

Overview

Using Integrations between Jobpac Connect and Field View, data can be captured in Tasks and Forms in Field View and interfaced to Jobpac Connect where an Interface Point has been defined.

Conceptually, for any Project that is to be integrated with Field View, the Field View Forms and Tasks for that project are firstly mapped where an integration of that Form or Task is desired. In the case of time capture for example, Field View Time Card Forms are mapped to the Jobpac TIMESHEET Interface Point for that Job. Form mapping ensures that mandatory fields are interfaced but allowing Form flexibility in Field View Form creation at the same time. Ie the Field View Time Card Form, in which data is collected in this example, can be customized to suit the customer but must at minimum contain mandatory fields for the Interface. Currently there are Interface Points for TIMESHEETS, DEFECTS, SI (Site Instructions), NCR (Non Conformance Reports) and PO (Purchase Orders).

When the Integration is activated data is captured in Forms and Tasks in Field View and interfaced through the defined interface point to Jobpac Connect where the data is processed as desired. It is the *Interface Point* that defines the nature of the processing in Jobpac Connect. And as mentioned, currently there are Interface Points for TIMESHEETS, DEFECTS, SI (Site Instructions), NCR (Non Conformance Reports) and PO (Purchase Orders).

Forms and Tasks will be pulled from Field View using web services at the touch of a [FV Refresh] button at the appropriate place in the Jobpac Connect application or automatically interfaced either by program trigger or by Scheduled Jobs.

Integration Setup

The following Integration Setup section will firstly outline some recommended setup workflows for…

- First Time Setup and Testing Steps – How to setup and test your integration for the first time.
- New Job Setup Workflow – What you need to consider when adding a new Job.
- New User Setup Workflow – What you need to consider when adding a new User.

Subsequently, the Integration Setup section will describe Field to Office Mapping Processes in detail, including…

- Mapping Projects and Interface Points – Used to link Jobs in Jobpac to Jobs in Field View
- User Mapping – Used to link Field View Users to Jobpac Users
- Exporting Jobpac Data to Pre-Defined Answer Lists in Field View. – useful to create valid list box selections on forms in field view based on the data in Jobpac Connect

Recommended Setup Workflows

First Time Setup and Testing Steps

When setting up any new Field View to Jobpac Connect Integration for the very first time the following steps are recommended in sequence.

1. Set up the Interface back end as per Appendix 1 in this document. These steps will normally be performed by the Jobpac Consultant and should be completed as a first step before the operational setup steps.
   It is advised that you replicate the set up in a Test Environment in Jobpac for your testing.
   Note: Refer to Appendix 1 in this document

2. Set up Pre Defined Answer Lists (PDA's) at enterprise Level in Field View as required. The Jobpac Interface mapping can export data to these PDA Lists. You may find it helpful to Include one dummy Pre Defined Answer in each to assist with set up. These dummy entries can be deleted after first load and are not required if it is not a first time setup.
   Note: PDA Setup is not covered in this document Refer to Field View Training guides.

   - Employee PDA Lists can be used for Time Capture in the field.
   - Cost Centre Lists can be used for Field Time and PO's and should be project based PDA's
   - Supplier PDA Lists can be used in Field PO's

3. Setup the Field View Forms and Tasks as required. You can use the suggested Form and Task templates as described later in this document as a starting point. Forms and Tasks can however be customised to suit the use-case providing that the mandatory interface point fields are included.
   Note: Setup of Field View Forms and Tasks is not covered in this document Refer to Field View Training guides.

   For example,
   - PO Requisition Form
   - Time Card Form

- Defects, Site Instructions, NCR's are more likely to be Tasks.

These Forms may include the PDA Lists already defined in step 2.

4. Set up your Test Project in Field View and a set up a new test project in Jobpac Connect or use an old one in the test environment if preferred. It is highly recommended that you use a test database in Jobpac.
Note: Setup of Projects is not covered in this document Refer to Field View and Jobpac Connect Training guides.

5. Allocate your FV Forms and Tasks to the Test Project in Field View.
Note: Refer to Field View Training guides for assistance in Allocating Forms and Tasks to Projects in Field View

6. Add one of each Form and Task to be used to the Test Project and ensure that all Fields are populated on each Test Form. Flag them as Complete. It is important on first time setup of a new form that all fields are populated to enable Interface point mapping.
Note: Refer to Field View Training guides for assistance in Adding Forms and Tasks to Projects in Field View

7. In Jobpac map the Test Project in Field View to the Test Project in the Jobpac Connect Testing environment.
Note: Refer to the Section below on Mapping Projects and Interface Points

8. Map the required Interface Points in Jobpac Connect.
Note: Refer to the Section below on Mapping Projects and Interface Points

9. Export data as required to the PDA Lists in Field View.
Note: Refer to the Section below on Exporting to PDA Lists

10. Import Users from Field View. Noting that importing Users from Field View and mapping them to Jobpac Users will only bring down Users who have been allocated to projects in Field View that have been mapped already in Jobpac. Therefore this step will need to be carried out multiple times if users are new or new projects are mapped.
Note: Refer to the Section below on User Mapping

11. Test the import of Test forms to Jobpac through the relevant interface point. It is recommended that you test from end to end including full operational testing in Jobpac paying particular attention to PO approval workflow testing based on the customers' required Approval matrixes.
Note: Refer to the Section below on Integration Operations

12. Test the Integration using Manual Refresh Options first and then Activate Auto refresh jobs if desired. It is recommended that you test again after the Auto refresh jobs are activated.
Note: Refer to Appendix 1 in this document for set up of Auto refresh jobs. This is a technical consulting exercise.

Should the testing above prove successful you will be ready to demonstrate and start rolling out the various Integrations to your projects and teams in a controlled fashion.

New Job Setup – What Mapping Steps should be considered?

When a new Job is created in Jobpac and a corresponding new Job is created in Field View, if there are Field to Office integration requirements then the Jobpac Job and the Field View Job will need to be mapped. This section describes the recommended steps to include in your new Job setup Workflow.

1. Map the New Project in Field View to the New Project in the Jobpac Connect. *Note: Refer to the Section below on Mapping Projects and Interface Points*

2. Map the required Interface Points for the new Project. Ie will this project be using PO's, Time Capture, Defects etc. You may want to utilize the Copy Job Mapping features to speed up the process
   Note: Refer to the Section below on Mapping Projects and Interface Points

3. Export data as required to the PDA Lists in Field View. You may want to upload Project Cost centre lists for the new Job or new suppliers or Employees.
   Note: Refer to the Section below on Exporting to PDA Lists

4. Import Users from Field View. If new users have been added in Field View and been given access to Jobs you may need to Import those new users from Field View and Map them to Users in Jobpac Connect. This is of particular importance if the PO Integration is used so that the correct PO Approval Limits are used for that User.
   Note: Refer to the Section below on User Mapping

New User Setup - What Mapping Steps should be considered?

When a new User is created in Jobpac and a corresponding new User is created in Field View and given access to projects that are integrated to Jobpac, if there are Field to Office integration requirements then the Jobpac User and the Field View User will need to be mapped. This section describes the recommended steps to include in your new User setup Workflow.

1. Export data as required to the PDA Lists in Field View. You may want to upload and refresh Employee PDA lists in Field view as new employees are on boarded.
   Note: Refer to the Section below on Exporting to PDA Lists

2. Import Users from Field View. If new users have been added in Field View and been given access to Jobs you may need to Import those new users from Field View and Map them to Users in Jobpac Connect. This is of particular importance if the PO Integration is used so that the correct PO Approval Limits are used for that User.
   Note: Refer to the Section below on User Mapping

Mapping Projects and Interface Points

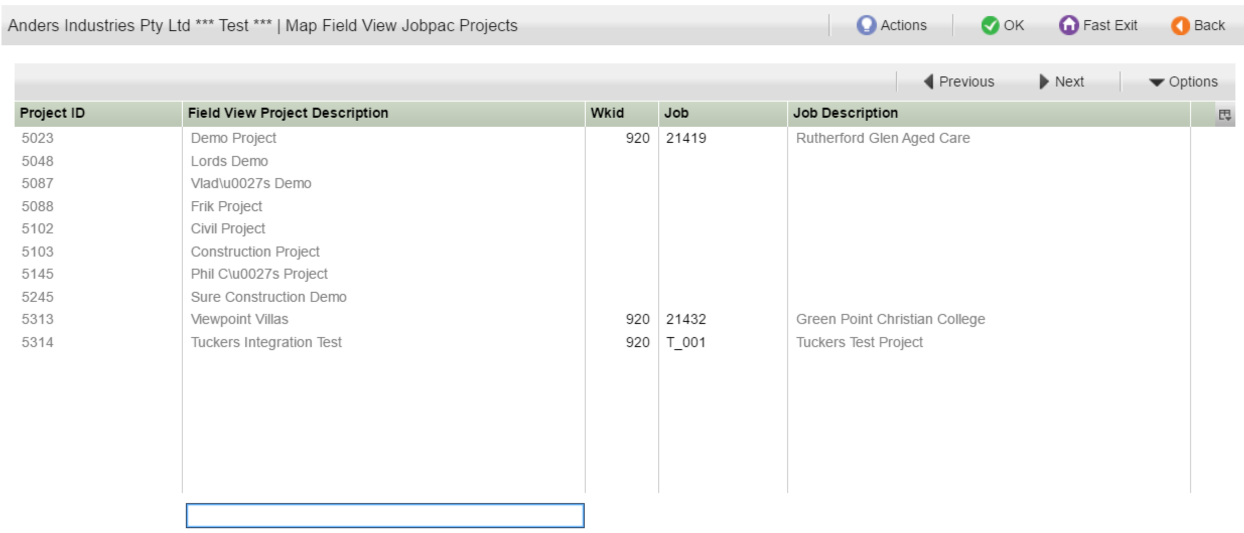
Follow the 3 step Mapping process below to activate Field to Office Integration on a Project

- ✔ Step 1 – Link Field View Projects to Jobpac Projects
- ✔ Setp 2 – Map Field View Tasks & Forms to Project Interface Points
- ✓ Step 3 – Map Form Field Names

Link Field View Projects to Jobpac Projects

The first step in setting up the Integration mapping is to link Field View Projects to Jobpac Projects. A one-to-one project mapping is required for all Jobpac Projects wishing to integrate with Field View. Field View Projects can be mapped to Jobpac Projects in any Work ID.

After navigating to the FV Project & Form Mapping menu option via *System Administration →Configure Modules →Field View Interface …* you will be taken to a screen as shown below.



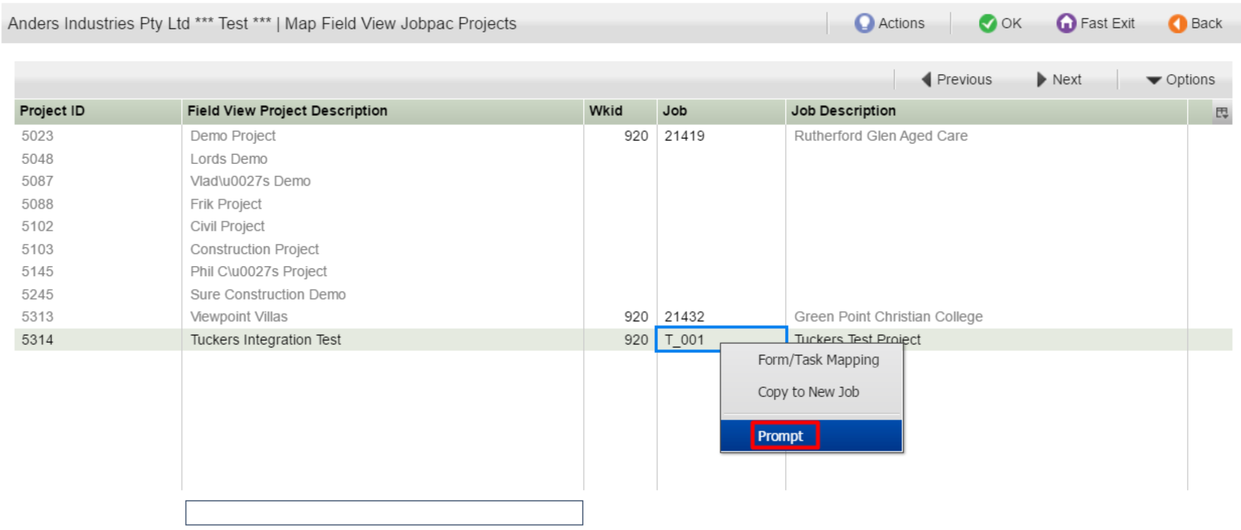
Field Name	Description	Type
Project ID	This is the Field View Project ID. This field is a hidden field in Field View and the user will not recognize it however it is used for reference in the interface back end	C
Field View Project Description	This is the Project description from the Project in Field View and the user of Field View will recognize this description	C
Wkid	This is the Jobpac Work ID or Company Code	E
Job	This is the Jobpac Job Code	E
Job Description	This is the Jobpac Job Description	C

Import from Field View

Firstly refresh the Field View Project List from Field View by clicking on the action option to ► *"Import from Field View"* as shown below. This is required to import new projects that have recently been setup in Field View that have not already been mapped to Jobpac Projects.

Map Jobpac Project to Field View Project

Then find the Field View project you wish to map to in the list and prompt on the Job column using F4 (or Right click Prompt) in the relevant field, as shown below. From the Job scan select the Jobpac project with a double click and then click [OK] to complete the first step of mapping.



Map Field View Tasks & Forms to Project Interface Points

The next step is to map Field View Tasks/Forms for the Project to predefined Interface Points in Jobpac Connect.

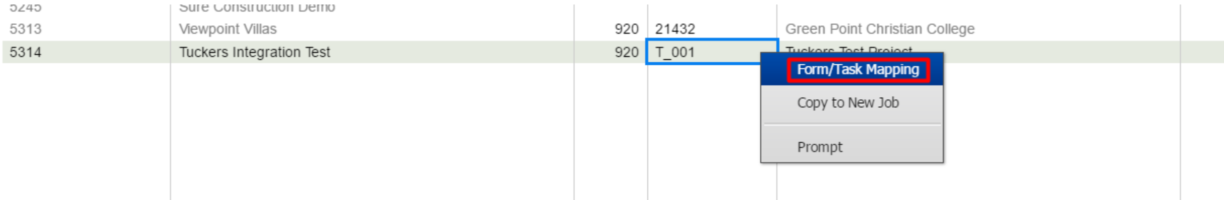
Note that it is possible to have multiple Tasks/Forms mapped to the same Interface Point. Eg there may be two time collection Forms in Field View that should all map to Jobpac's ETS function.

It is possible to copy an existing projects entire mapping if you do not anticipate any different forms or tasks to be used on the new project. This will save time and will be described in the relevant section below.

We will now describe how to create a new mapping which will be required if you have a new form or task for a Job or if you are mapping a new interface point.

Creating a New Mapping

Tasks and Forms can be mapped from scratch by right click on a project after the projects have been linked as described above, and selection of the ► *Form/Task Mapping* option as shown below

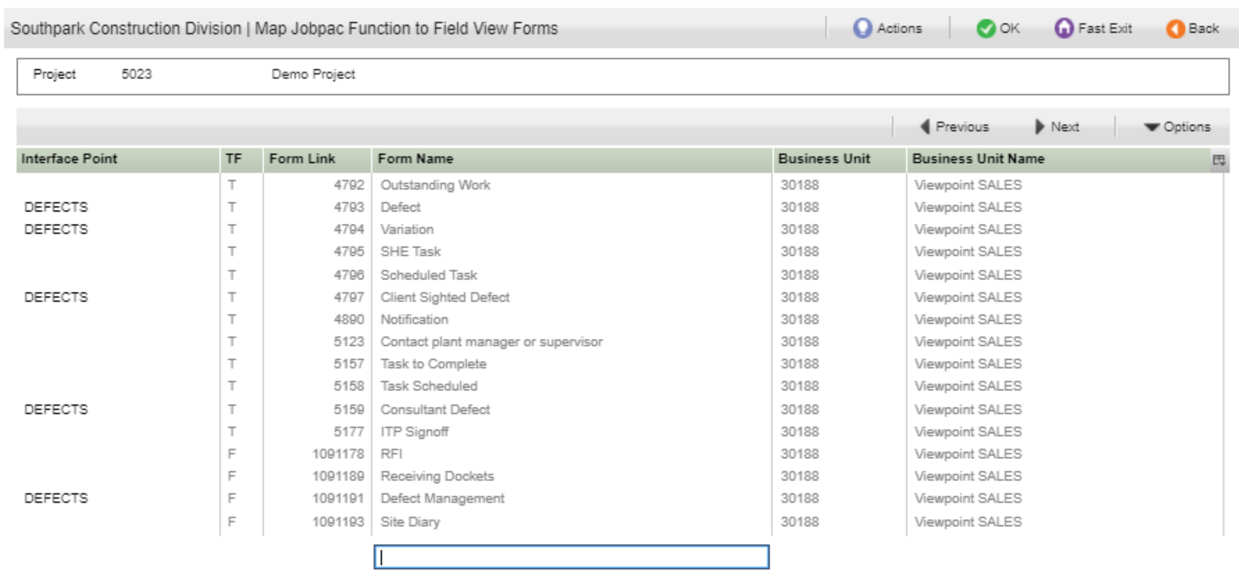


Mapping a Task/Form to a Jobpac Interface Point.

On selection, a new screen will be displayed listing available Tasks and Forms for the Field View Project selected as shown below. You will note if this is a new mapping the Interface Point Column will be blank. On this screen you can also maintain an existing mapping from this screen.

Technical Note: different "Versions" of Field View Forms will have the same Form Link ID. So it is not necessary to remap a form if a new version is created of the same form. Unless of course more fields have been added that you want to map.

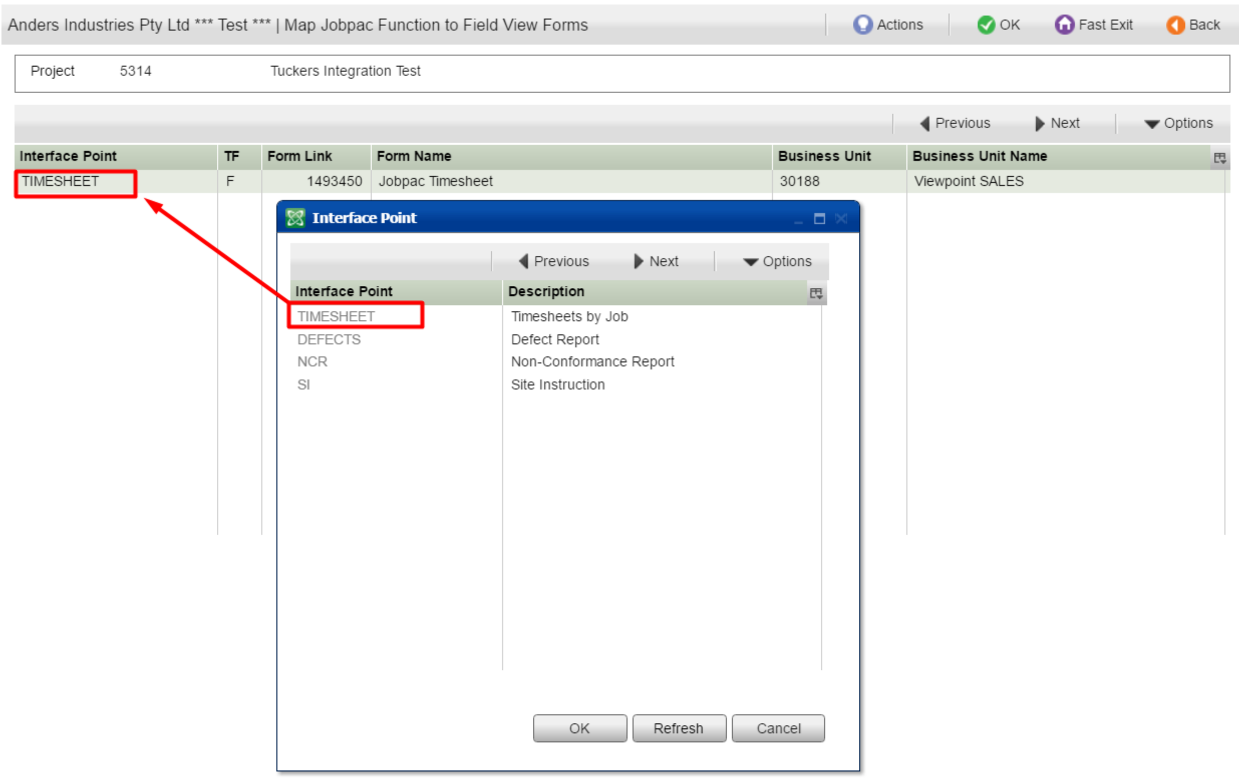
Also, note that the available form list will be dynamically updated from Field View so that new forms will be immediately available. If you can't find your form, check that it has been added to the Job in field view and refresh your list from the Actions option.



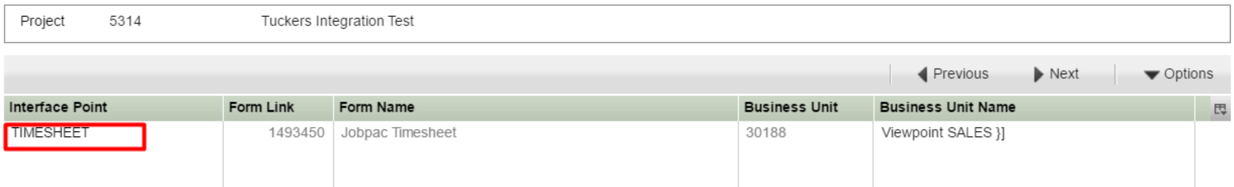
Interface Point	TF	Form Link	Form Name	Business Unit	Business Unit Name
	T	4792	Outstanding Work	30188	Viewpoint SALES
DEFECTS	T	4793	Defect	30188	Viewpoint SALES
DEFECTS	T	4794	Variation	30188	Viewpoint SALES
	T	4795	SHE Task	30188	Viewpoint SALES
	T	4796	Scheduled Task	30188	Viewpoint SALES
DEFECTS	T	4797	Client Sighted Defect	30188	Viewpoint SALES
	T	4890	Notification	30188	Viewpoint SALES
	T	5123	Contact plant manager or supervisor	30188	Viewpoint SALES
	T	5157	Task to Complete	30188	Viewpoint SALES
	T	5158	Task Scheduled	30188	Viewpoint SALES
DEFECTS	T	5159	Consultant Defect	30188	Viewpoint SALES
	T	5177	ITP Signoff	30188	Viewpoint SALES
	F	1091178	RFI	30188	Viewpoint SALES
	F	1091189	Receiving Dockets	30188	Viewpoint SALES
DEFECTS	F	1091191	Defect Management	30188	Viewpoint SALES
	F	1091193	Site Diary	30188	Viewpoint SALES

Field Name	Description	Type
Interface Point	This is the Jobpac Interface Point that you are mapping the Form or Task to	E
TF	Field View Form or Task. Both can be mapped	C
Form Link	This is the FV Form Link ID. It is a hidden field but in the back end each unique form has a unique ID and it is used for mapping	C
Form Name	This is the Field View Form/Task name	C
Business Unit	The Field View Business Unit ID. It is a hidden field but used in the back end as part of the Form Identifier	C
Business Unit Name	The Field View Business Unit name that the Form/Task is created under	C

To map a Task or Form to a Jobpac Interface Point position to the relevant field in the Interface Point column and scan using F4 or Prompt. A predefined list of available Interface Points will be shown in a scan window for selection as shown below. One only can be selected.

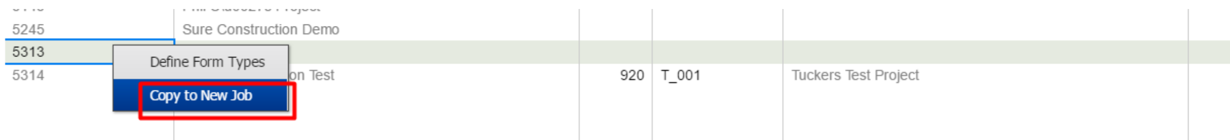


In this example we have selected the Jobpac TIMESHEET Interface point to map the Field View Form for time capture. Double click to select and you will be able to see the Interface point next to the Form as shown below. Then Click [OK] to save the selection.



Copy an Existing Project Setup

Tasks and Forms can also be mapped to a new project quickly by copying the full mapping from an existing project setup. This can be done by right click on the Project and selection of the ► *Copy to New Job* option as shown below



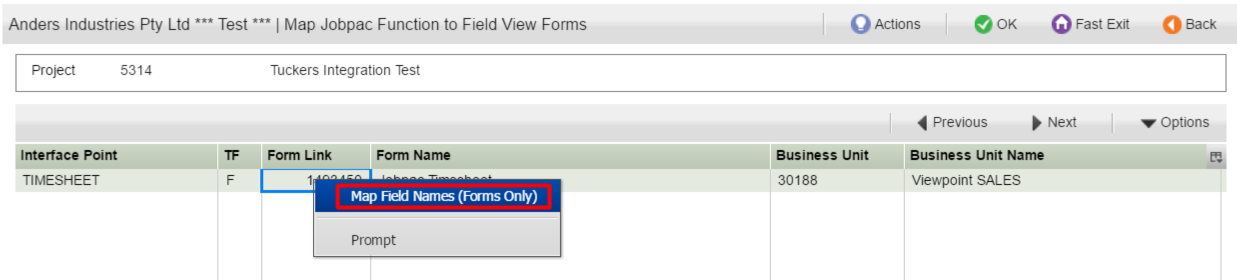
Map Form Field names

After linking a Field View Form (or Task) to an Interface point the next step in setup is to map the Field View Field Names to the mandatory Jobpac Interface fields. This step allows further flexibility in Field View Form creation and as long as the Field View Form has at least the mandatory interface fields, then it can be interfaced, while still capturing other information in Field View itself.

Map field Names

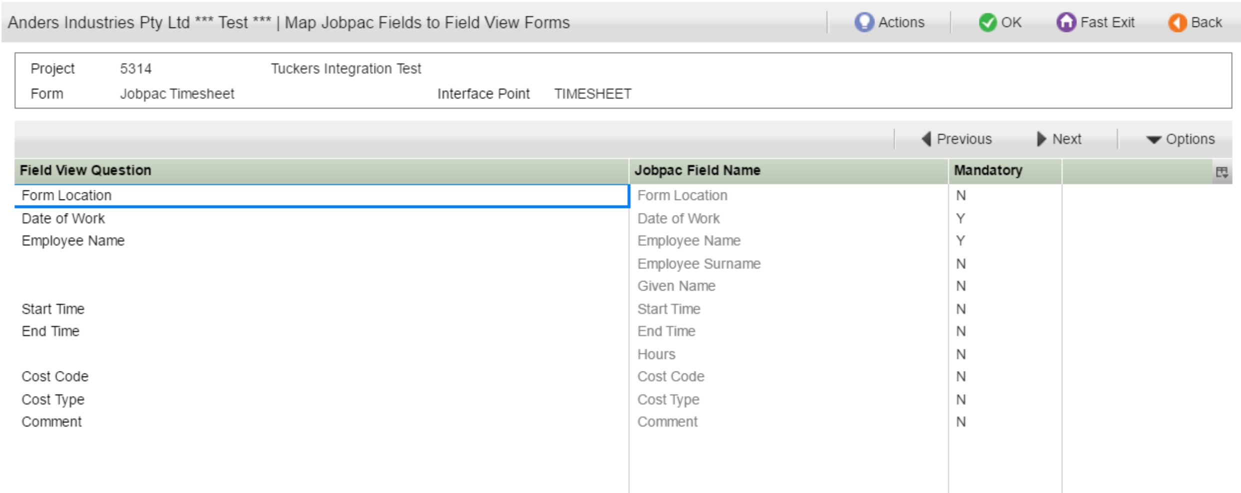
Continuing on from the previous section, this can be done by right click on the Interfaced Form and selecting ► *Map Field Names* as shown below.

This is only required for Form Mapping and not required for Task mapping.



The Field Mapping screen will be displayed (as shown below) showing the Jobpac Interface point field names and an indication of whether it is a Mandatory field for the Interface to Work. Fields can also be flagged as Alternate fields which may be mapped as an alternative to a mandatory field. Or Fields may simply be optional and not required for the Interface to work.

If you are setting up a new mapping then initially the Template Field name column will be blank and the next step is to map the Form field names to the Jobpac Field names as described below.



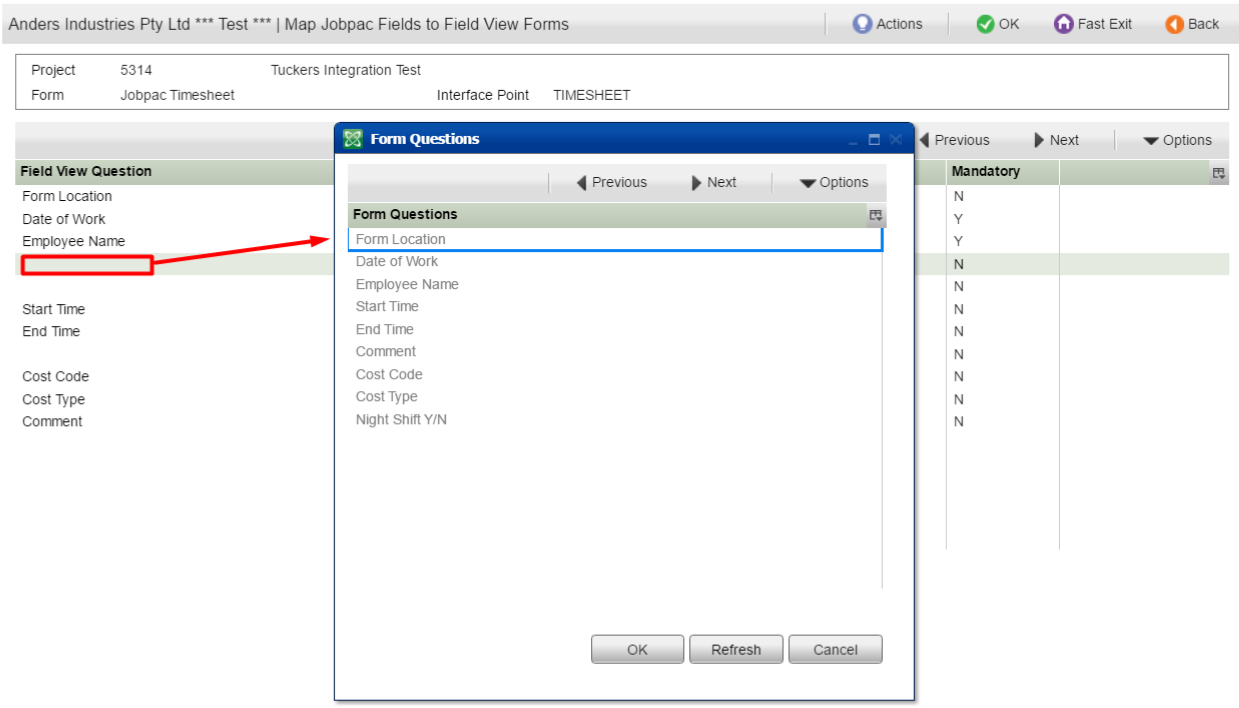
Field Name	Description	Type
Field View Question	This is the question on the Field View Form that you want to map to the Interface Field. The field can be scanned on and the scan will be dynamically populated by web services from the Field View Form itself. The Field View Question must match the form exactly otherwise an error will be displayed.	E
Jobpac Field Name	This is the Jobpac Field to be mapped to that is required for the Interface Point	C
Mandatory	Y = Mandatory, A = Alternative for Mandatory field, N= Optional	C

Mapping the Form Questions to the Interface Point

Position to the relevant field in the Field View Question Column and use F4 or Prompt to scan for the available Field View Form Questions as shown below.

Technical Note: Web services will dynamically build the list of Field View Form Questions available for selection from the relevant Form Link ID

Also note, You may need some guidance from a Jobpac Consultant when setting up your first mapping.



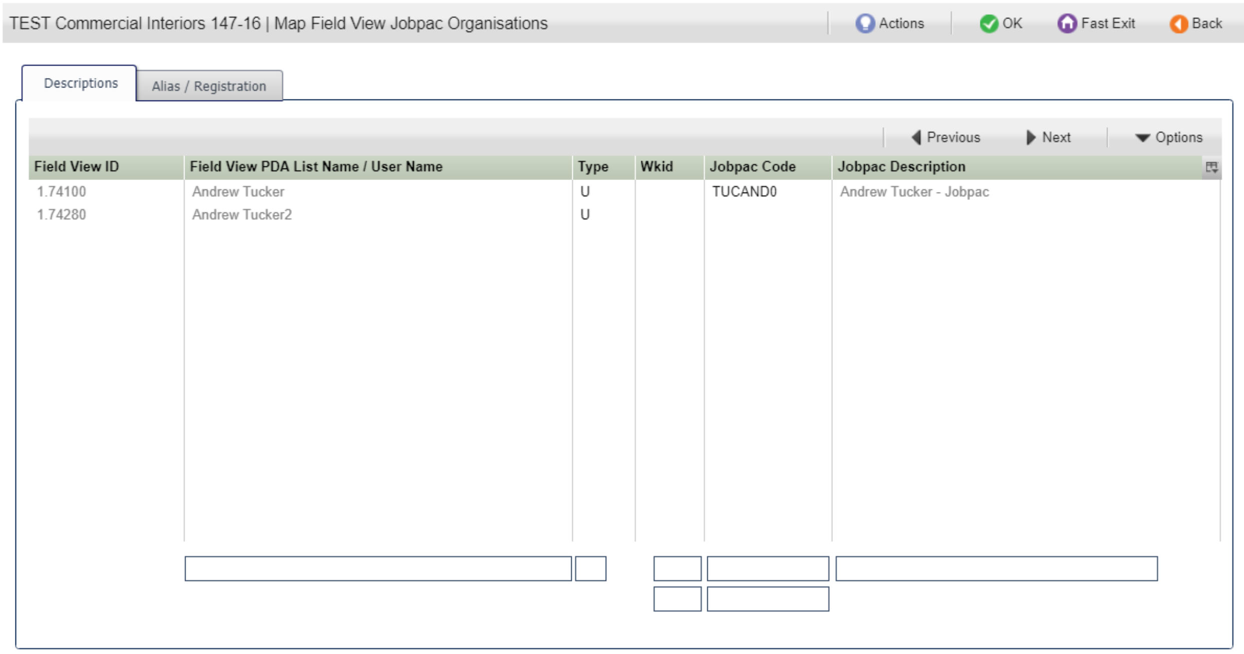
Then select with a double click the Field View Form Question that you wish to interface and it will be brought back and matched to the Jobpac Field name. Click [OK] to save selections. Once all relevant Form Questions have been mapped the 3 step Mapping process is complete and the Interface is ready to use!

User Mapping

Users in Field View can be mapped to Users in Jobpac Connect. This is essential if you are using the PO Integration as the User mapping will determine the link to the PO Approval Matrix.

Creditors, Project Cost Centres and Employees can also be exported from Jobpac Connect to Field View PDA Lists. This will be discussed in relevant sections of this document below.

Navigate in Jobpac Connect to the *FV User and Org. Mapping* menu option, via *System Administration* → *Configure Modules* → *Field View Interface …* you will be taken to a screen as shown below



Field Name	Description	Type
Field View ID	This is the Field View Organisation/User ID. This field is a hidden field in Field View and the user will not recognize it however it is used for reference in the interface back end	C
Field View PDA List Name / User Name	This is the User Description from the User in Field View and the user of Field View will recognize this description. Depending on the Type the column will also show the Field View PDA List name that Creditors and Employees may have been exported to.	C
Typ	U = User, C = Creditor, E = Employee	E
Wkid	This is the Jobpac Work ID and is used in combination with the Jobpac Code. This field will always be blank for User Mapping	E
Jobpac Code	This is the Jobpac Code that will be mapped to the Field View User or PDA List. It can represent the Jobpac Creditor, Employee or User Profile	E
Jobpac Description	This will contain the Jobpac Description that relates to the Jobpac Code. It could be different to the Field View User Name.	C
Jobpac ABN	On the Alias Tab. Will contain the Jobpac Creditor ABN for crossmatch to the Field View Organisation ABN	C
Field View Registration	On the Alias Tab. Will contain the Field View Organisation Registration number that is normally set up with an Organisation ABN.	C

Importing and Mapping Users from Field View

If the PO Interface is going to be used it is important that Users from Field View are mapped to User Profiles in Jobpac. This is important so that PO's captured in the field can be move down the correct Approval Workflows in Jobpac Connect, and so that Jobpac knows where to email the Purchase Orders back to after Approval in Jobpac.

Refer to the *FV User and Organisation Mapping* screen as shown above

Navigation path in Jobpac Connect via menu option, *System Administration → Configure Modules → Field View Interface → FV User and Organisation Mapping*

Import Users from Field View

Use the Action option to ► "Import Users from Field View" to refresh the list of Users from Field view.

Existing users will remain with their mapping. New users will be imported with the Type of "U" and a blank Jobpac Code. The Organisation column will reflect a hidden Field View code that the operator will not recognise but the Organisation Description will reflect the recognisable FV User name

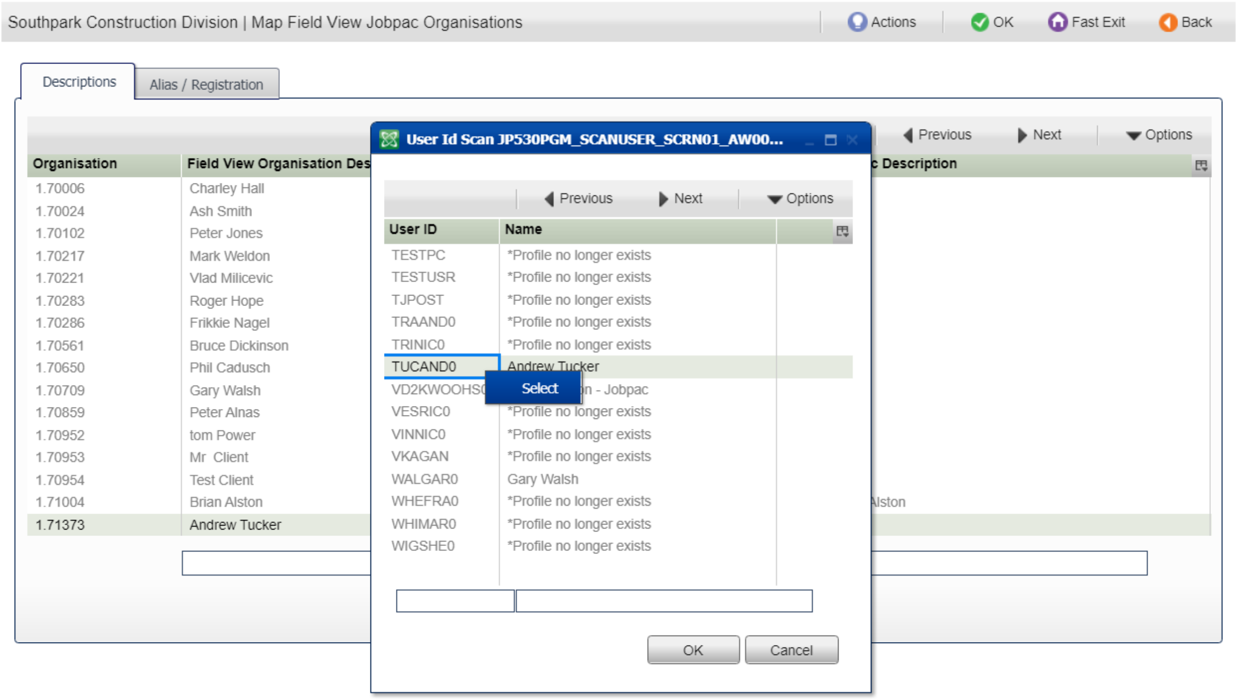
Note: Only Users from Projects already mapped will be imported from field view and therefore this step will need to be carried out multiple times whenever new users are assigned to projects or new projects are mapped. This step should be built into your on boarding and New Project setup workflow.

The next step is to map the FV Users to Jobpac User Profiles as described below

Mapping Jobpac Users to Field View Users

Position the cursor in the Jobpac Code field next to the Field View User that you wish to map.

Use [F4] or Right Click and Prompt in that field to open the Jobpac User ID scan window as shown below.



Right click and Select (or double click) the Jobpac User profile of choice.

You will be returned to the main mapping screen with the Jobpac user selected where you can continue mapping all remaining users or click OK to validate

Note: It is possible to map the same Jobpac User Profile to multiple Field View User names for special case circumstances.

Note: if you are using Jobpac PO Approval value matrix as part of Advanced Approvals workflow, it will be required that ALL Field View PO users are set up in Jobpac with approval limits and mapped to Field View users.

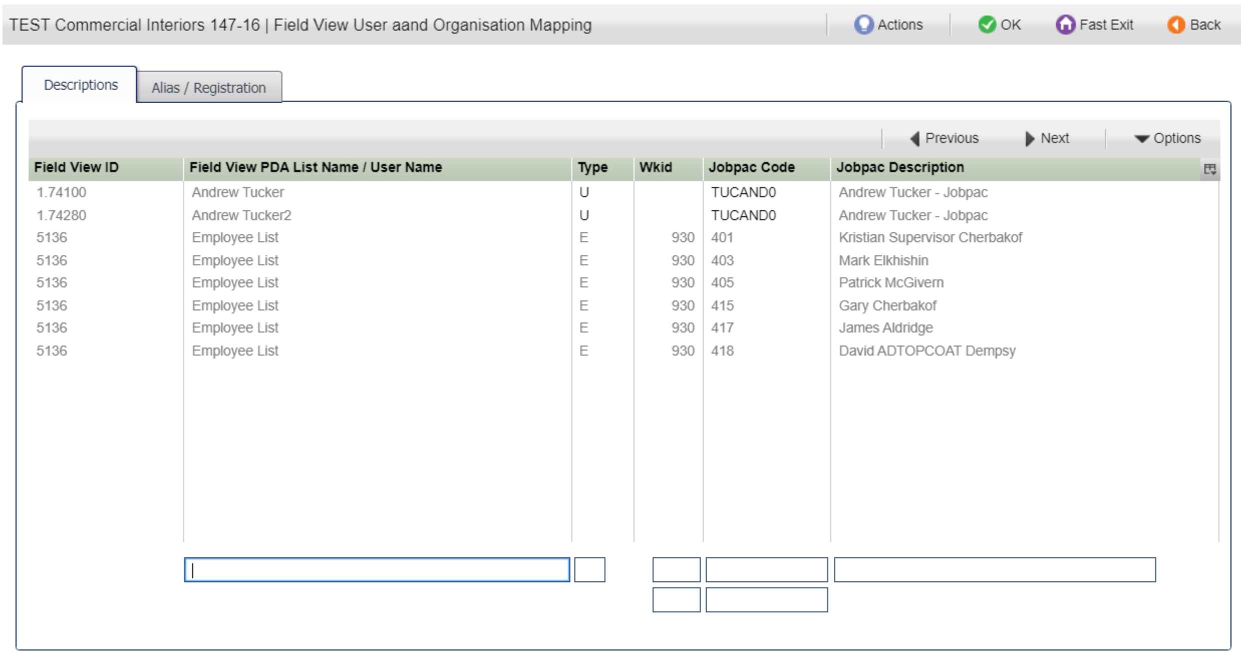
Exporting to Field View Pre Defined Answer Lists (PDA's)

Exporting Employees to Field View PDA's

It is possible to export Jobpac Employees to a Predefined Answer List (PDA) in Field View. This PDA will be at enterprise/Business Unit level in Field View and it will allow you to add PDA's to forms based on employees in Jobpac. This could be useful (but is not mandatory) for Time Capture if you are using the Field View to Jobpac Integration Timesheet Interface. You might also want different Employee lists for different Jobs in Field View and there is no restriction on this.

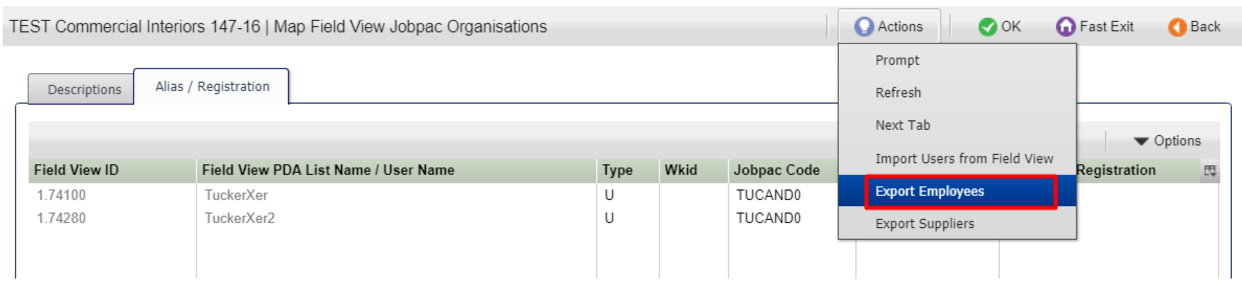
Follow the steps described below, referring to the *FV User and Org. Mapping* screen as shown below.

Navigation path in Jobpac Connect via menu option, *System Administration → Configure Modules → Field View Interface → FV User and Organisation Mapping*



Export Employees from Jobpac to Field View

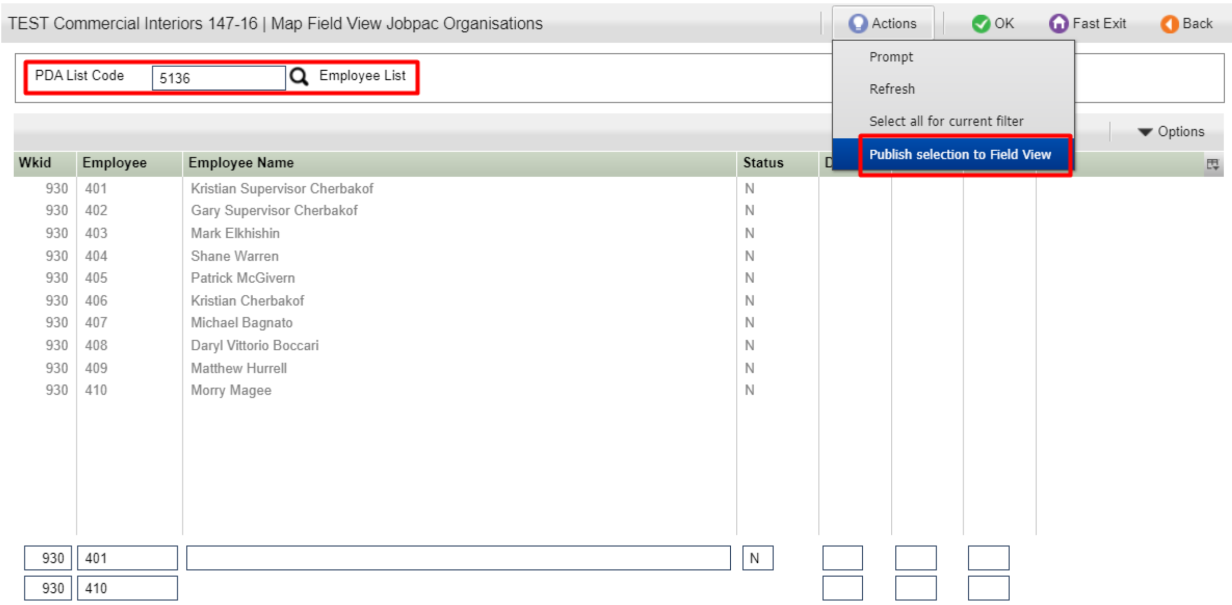
Using the Action option to ► "Export Employees" as shown below, to open the export control window



To export Employees from Jobpac to a PDA List in Field View, first ensure that the PDA List already exists in Field View. Then, referring to the screenshot below…

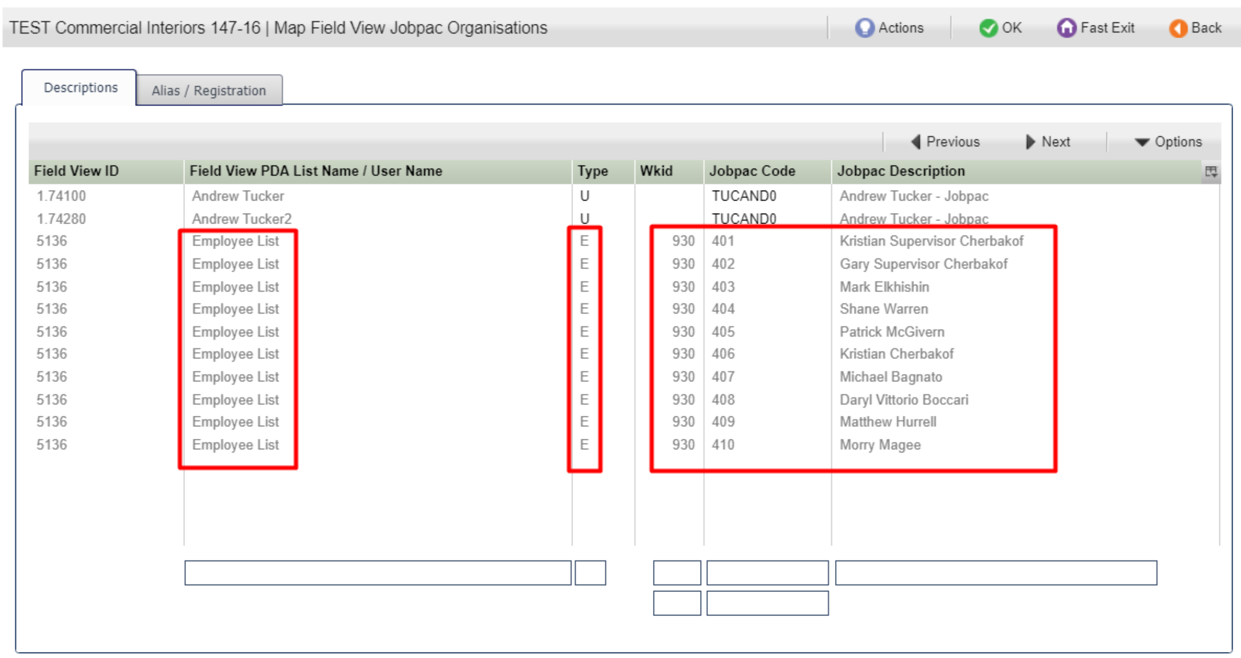
1. Scan and select the appropriate *PDA List Code* at the top of the screen.
2. Use the available filters to narrow down your selection of employees if required.
3. Use the Action option to ► "Select all for current filter"
4. You can also use Right click to deselect or individually select for fine tuning.
5. Use the Action option to ► "Publish Selection to Field View"

Note : All Employees not in a terminated status in Jobpac will be available to publish to the specified PDA list in Field View.



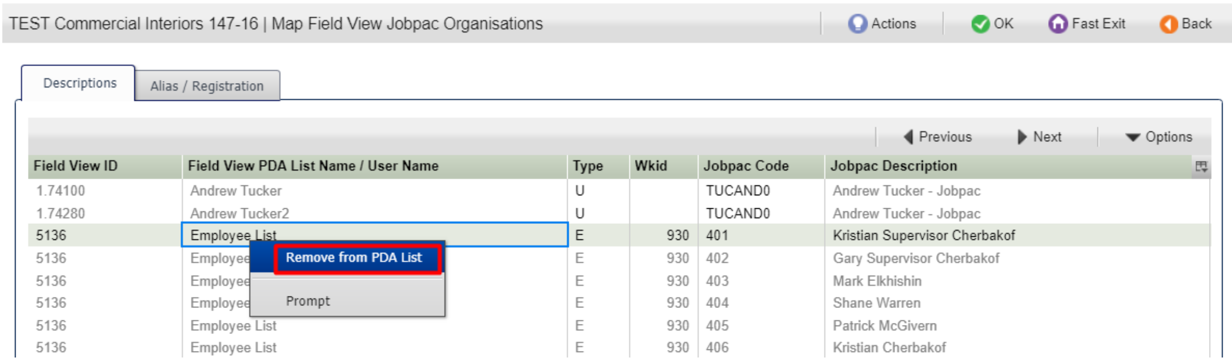
When you publish, the filtered selection of Employees will be pushed to the PDA List in Field View. You can do this multiple times and the PDA list will be updated with additional selections. The screen will revert to the Main User Mapping Screen and you will be able to see your new or refreshed PDA list entries as shown below.

Note, for Employee Exports the PDA List type will be "E"



Removing Entries from an Existing PDA List

It is possible to remove unwanted entries from a PDA list in Field View using the Right click option as shown below

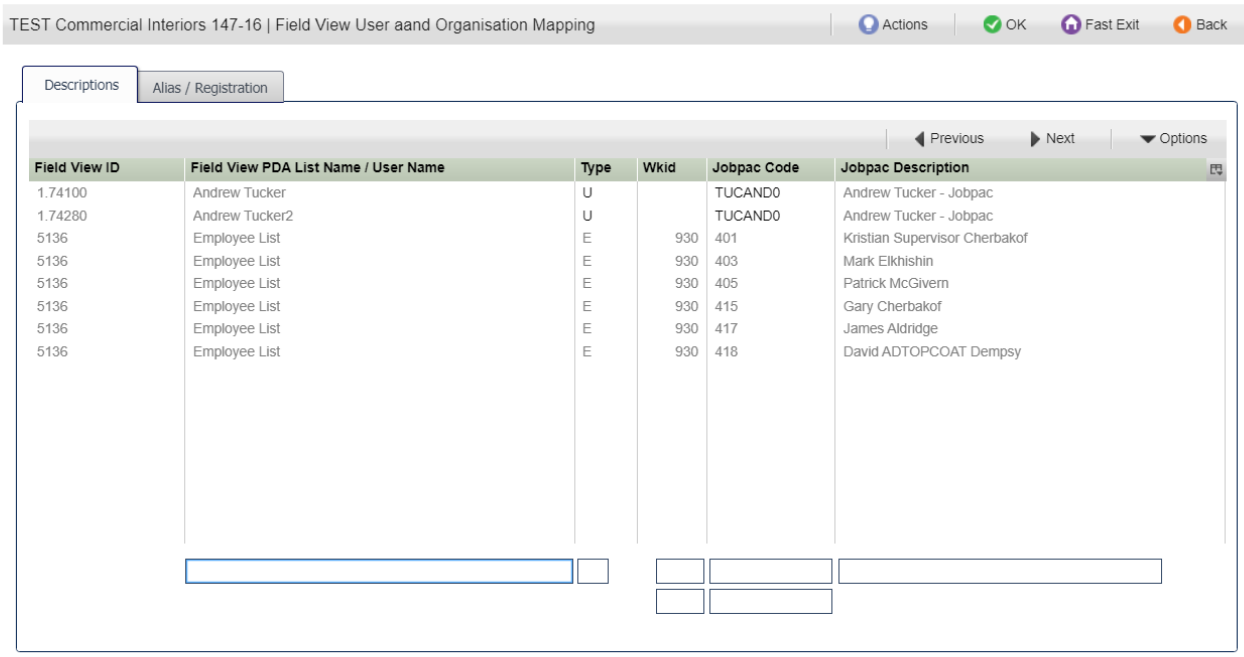


Exporting Jobpac Creditors to Field View PDA's

It is possible to export Jobpac Creditors to a Predefined Answer List (PDA) in Field View. This PDA will be at enterprise/Business Unit level in Field View and it will allow you to add PDA's to forms based on Creditors in Jobpac. This could be useful (but is not mandatory) for Field PO Requisitions if you are using the Field View to Jobpac Integration PO Interface. You might also want different Creditor lists for different Jobs or Business Units in Field View and there is no restriction on this.

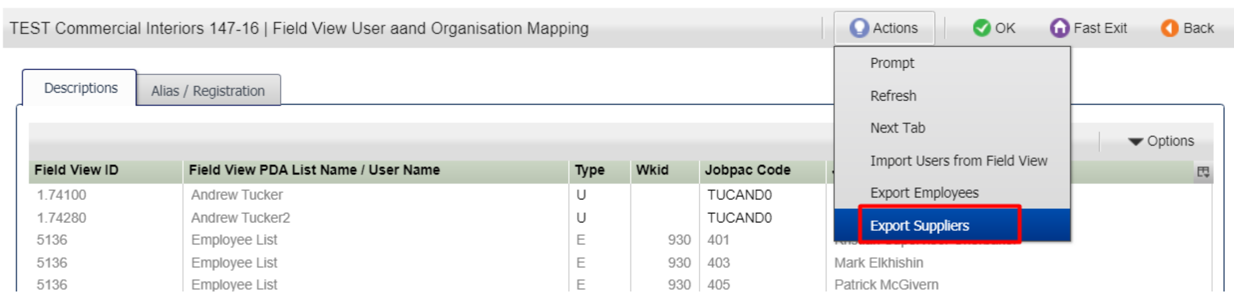
Follow the steps described below, referring to the *FV User and Org. Mapping* screen as shown below.

Navigation path in Jobpac Connect via menu option, *System Administration* → *Configure Modules* → *Field View Interface* → *FV User and Org. Mapping*



Export Suppliers from Jobpac to Field View

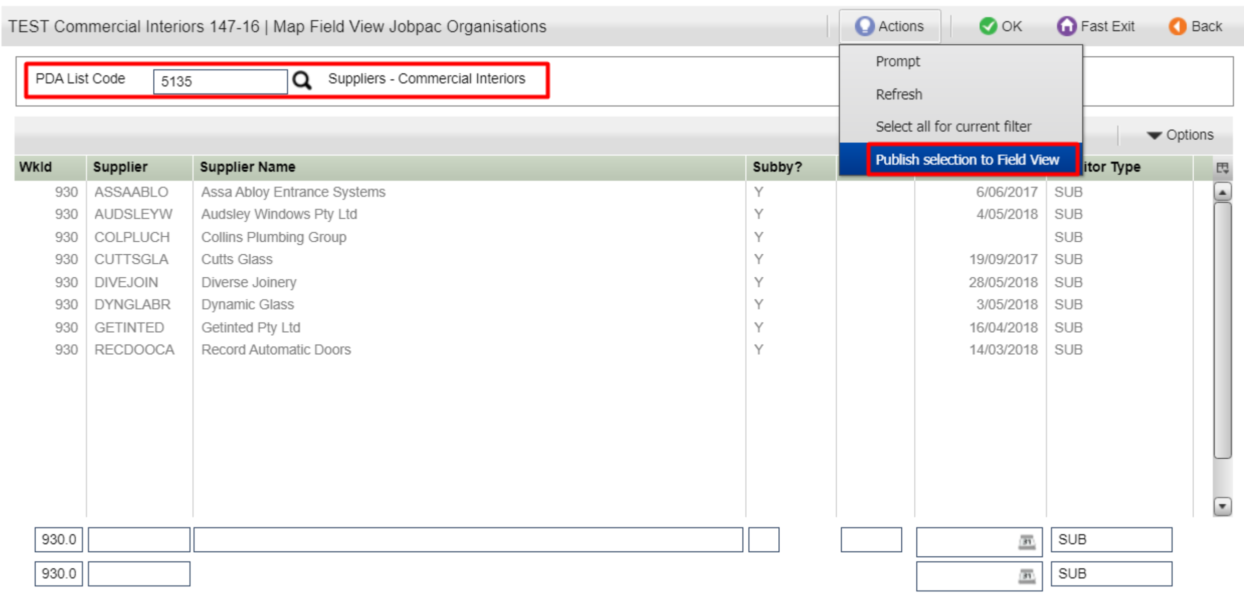
Using the Action option to ► "Export Suppliers" as shown below, to open the export control window



To export Creditors from Jobpac to a PDA List in Field View, first ensure that the PDA List already exists in Field View. Then, referring to the screenshot below…

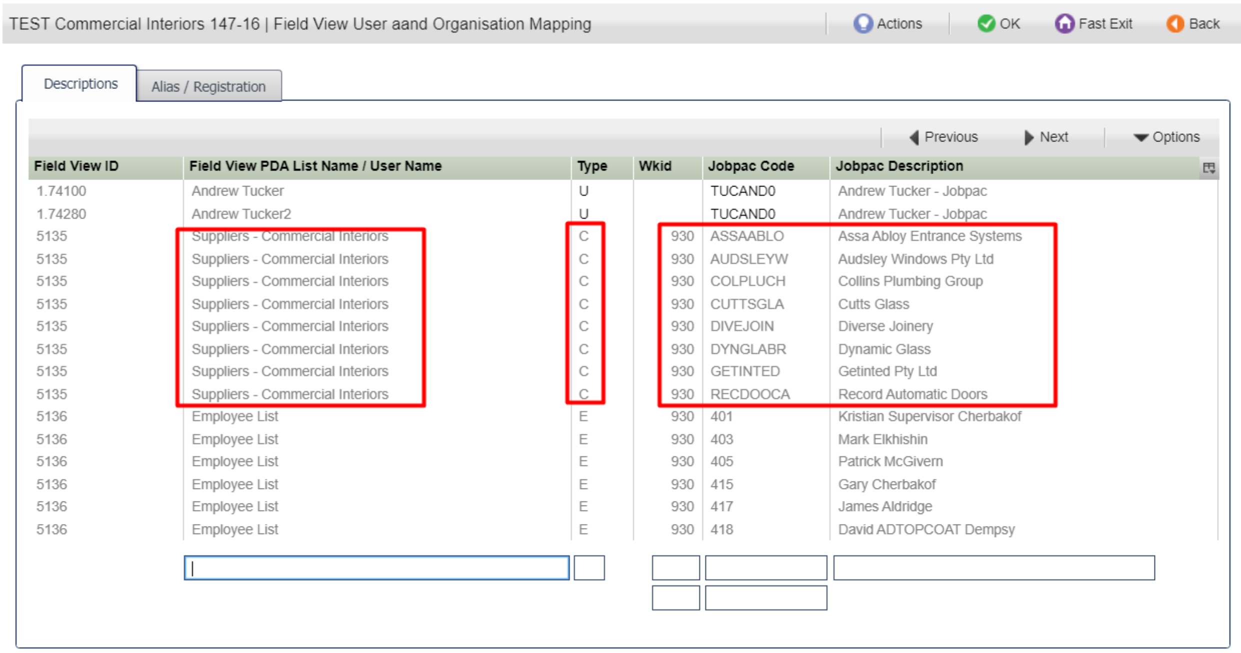
1. Scan and select the appropriate *PDA List Code* at the top of the screen.
2. Use the available filters to narrow down your selection of Creditors if required.
3. Use the Action option to ► "Select all for current filter"
4. You can also use Right click to deselect or individually select for fine tuning.
5. Use the Action option to ► "Publish Selection to Field View"

Note : The default filtered selection will be that of the current WorkID that you are in. But you could export creditors from a central WorkID if you are using a centralised setup.



When you publish, the filtered selection of Creditors will be pushed to the PDA List in Field View. You can do this multiple times and the PDA list will be updated with additional selections. The screen will revert to the Main User Mapping Screen and you will be able to see your new or refreshed PDA list entries as shown below.

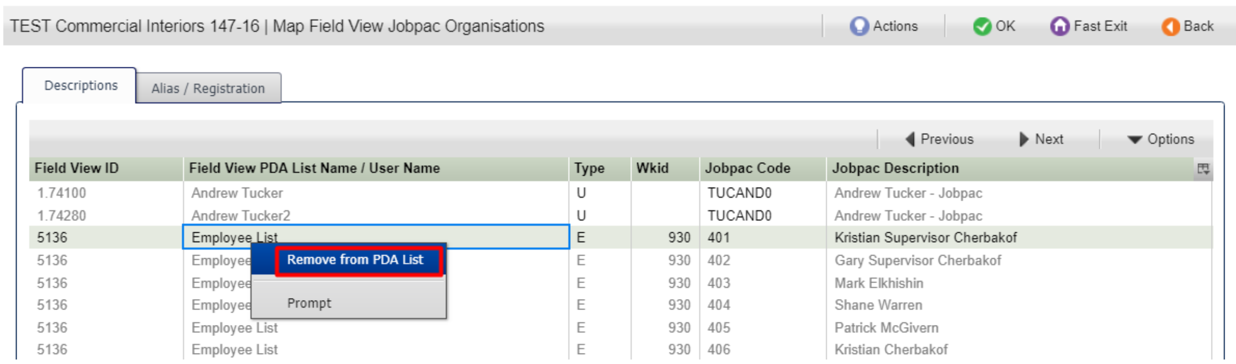
Note, for Creditor/Supplier Exports the PDA List type will be “C” as shown below



Field View ID	Field View PDA List Name / User Name	Type	Wkid	Jobpac Code	Jobpac Description
1.74100	Andrew Tucker	U		TUCAND0	Andrew Tucker - Jobpac
1.74280	Andrew Tucker2	U		TUCAND0	Andrew Tucker - Jobpac
5135	Suppliers - Commercial Interiors	C	930	ASSAABLO	Assa Abloy Entrance Systems
5135	Suppliers - Commercial Interiors	C	930	AUDSLEYW	Audsley Windows Pty Ltd
5135	Suppliers - Commercial Interiors	C	930	COLPLUCH	Collins Plumbing Group
5135	Suppliers - Commercial Interiors	C	930	CUTTSGLA	Cutts Glass
5135	Suppliers - Commercial Interiors	C	930	DIVEJOIN	Diverse Joinery
5135	Suppliers - Commercial Interiors	C	930	DYNGLABR	Dynamic Glass
5135	Suppliers - Commercial Interiors	C	930	GETINTED	Getinted Pty Ltd
5135	Suppliers - Commercial Interiors	C	930	RECDOOCA	Record Automatic Doors
5136	Employee List	E	930	401	Kristian Supervisor Cherbakof
5136	Employee List	E	930	403	Mark Elkhishin
5136	Employee List	E	930	405	Patrick McGivern
5136	Employee List	E	930	415	Gary Cherbakof
5136	Employee List	E	930	417	James Aldridge
5136	Employee List	E	930	418	David ADTOPCOAT Dempsy

Removing Entries from an Existing PDA List

It is possible to remove unwanted entries from a PDA list in Field View using the Right click option as shown below



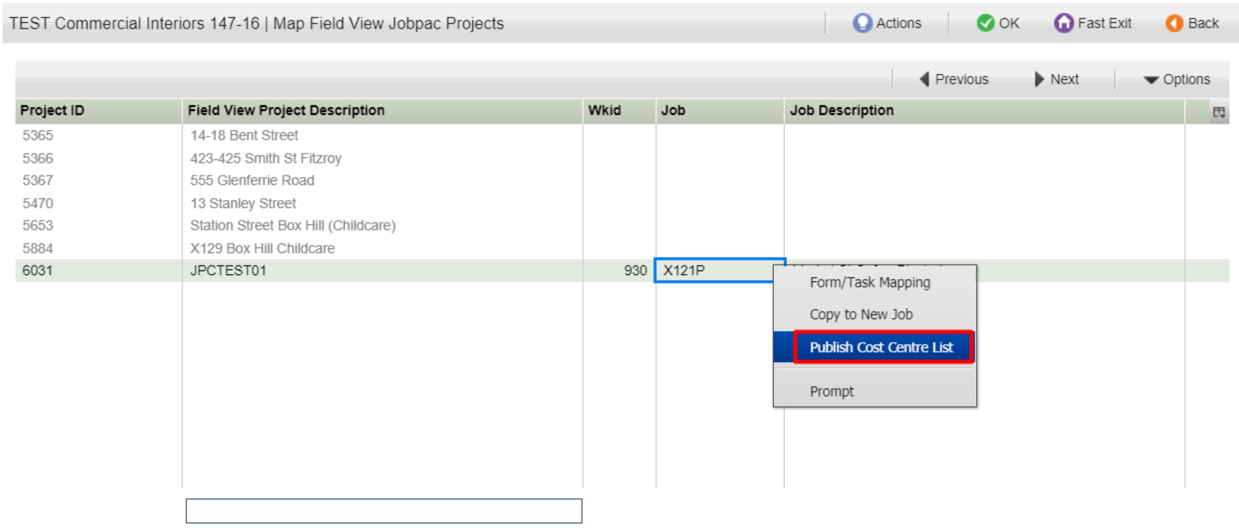
Field View ID	Field View PDA List Name / User Name	Type	Wkid	Jobpac Code	Jobpac Description
1.74100	Andrew Tucker	U		TUCAND0	Andrew Tucker - Jobpac
1.74280	Andrew Tucker2	U		TUCAND0	Andrew Tucker - Jobpac
5136	Employee List	E	930	401	Kristian Supervisor Cherbakof
5136	Employee	E	930	402	Gary Supervisor Cherbakof
5136	Employee	E	930	403	Mark Elkhishin
5136	Employee	E	930	404	Shane Warren
5136	Employee List	E	930	405	Patrick McGivern
5136	Employee List	E	930	406	Kristian Cherbakof

Exporting Cost Centre Lists to Field View PDA's

Once you have mapped your project, it is also possible to publish the Cost Centre list for that project to a Project level Pre Defined Answer List in Field View. This is very useful for Time collection and PO Requisition Integration (though not mandatory.)

Navigation path in Jobpac Connect via menu option, *System Administration → Configure Modules → Field View Interface → FV Project & Form Mapping*

From the main Mapping screen find the Project ID to which you wish to export. Then use the right click option and select ► *"Publish Cost Centre List"* as shown in the screen shot below



You will be presented with a PDA selection window as shown below.

Note : The PDA list must already exist in Field View and if it does it will show in the scan. PDA Lists for Cost Centres should be created in Field View as being Project Based

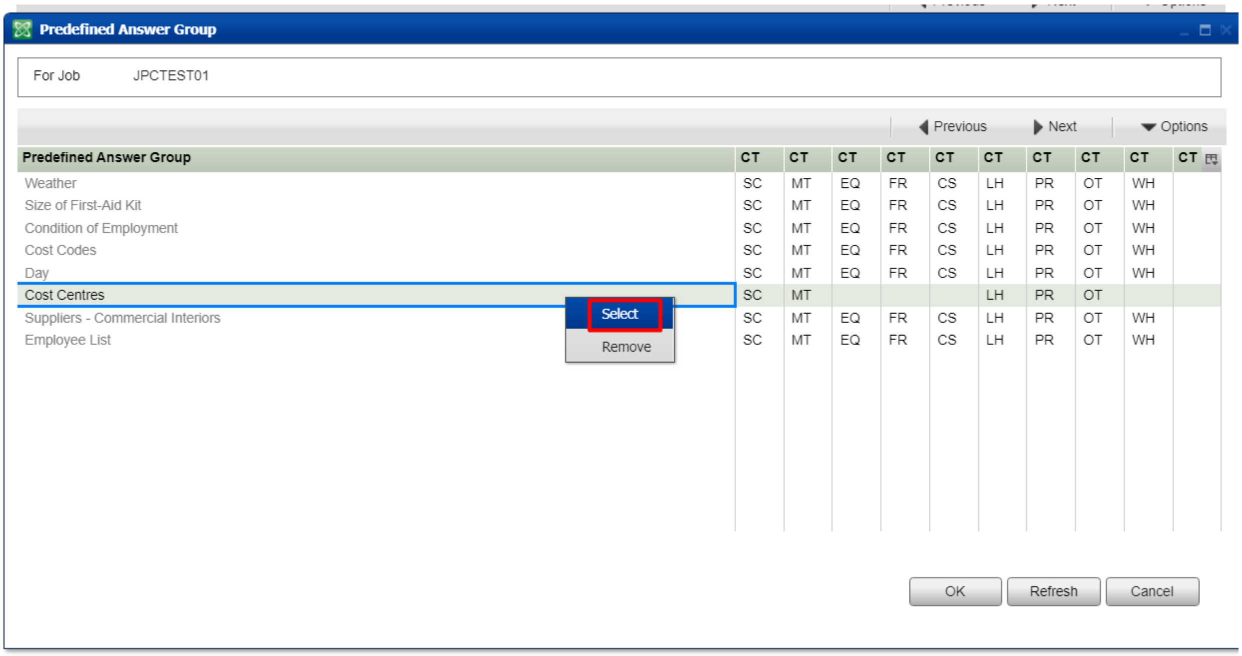
Note : Previously exported lists for the project will show as already selected.

Find the desired project based PDA list and select the Cost Types that you wish to export on this project. This can be useful for example if you want to create a Cost Centre PDA list for time capture and you only want to publish Cost Centres with Labour Cost Types. Or for PO Requisition PDA lists you may only want to export Material Cost Types. All Cost Types will be selected by default but to exclude a Cost Type double click on the cell and blank out the cost type to remove it from export.

Next, use Right Click and Select, on the PDA list that you wish to export to, as shown in the screenshot below.

Once you have selected the list and selected the Cost Types to publish, click [OK] or press [Enter] to proceed and publish.

[Cancel] the pop up window and a publish success message will be displayed.


Predefined Answer Group
For Job JPCTEST01
Previous
Next
Options
Predefined Answer Group CT CT CT CT CT CT CT CT CT CT
Weather SC MT EQ FR CS LH PR OT WH
Size of First-Aid Kit SC MT EQ FR CS LH PR OT WH
Condition of Employment SC MT EQ FR CS LH PR OT WH
Cost Codes SC MT EQ FR CS LH PR OT WH
Day SC MT EQ FR CS LH PR OT WH
Cost Centres SC MT LH PR OT
Suppliers - Commercial Interiors SC MT EQ FR CS LH PR OT WH
Employee List SC MT EQ FR CS LH PR OT WH
Select
Remove
OK
Refresh
Cancel

Integration Operations

Timesheet Integration

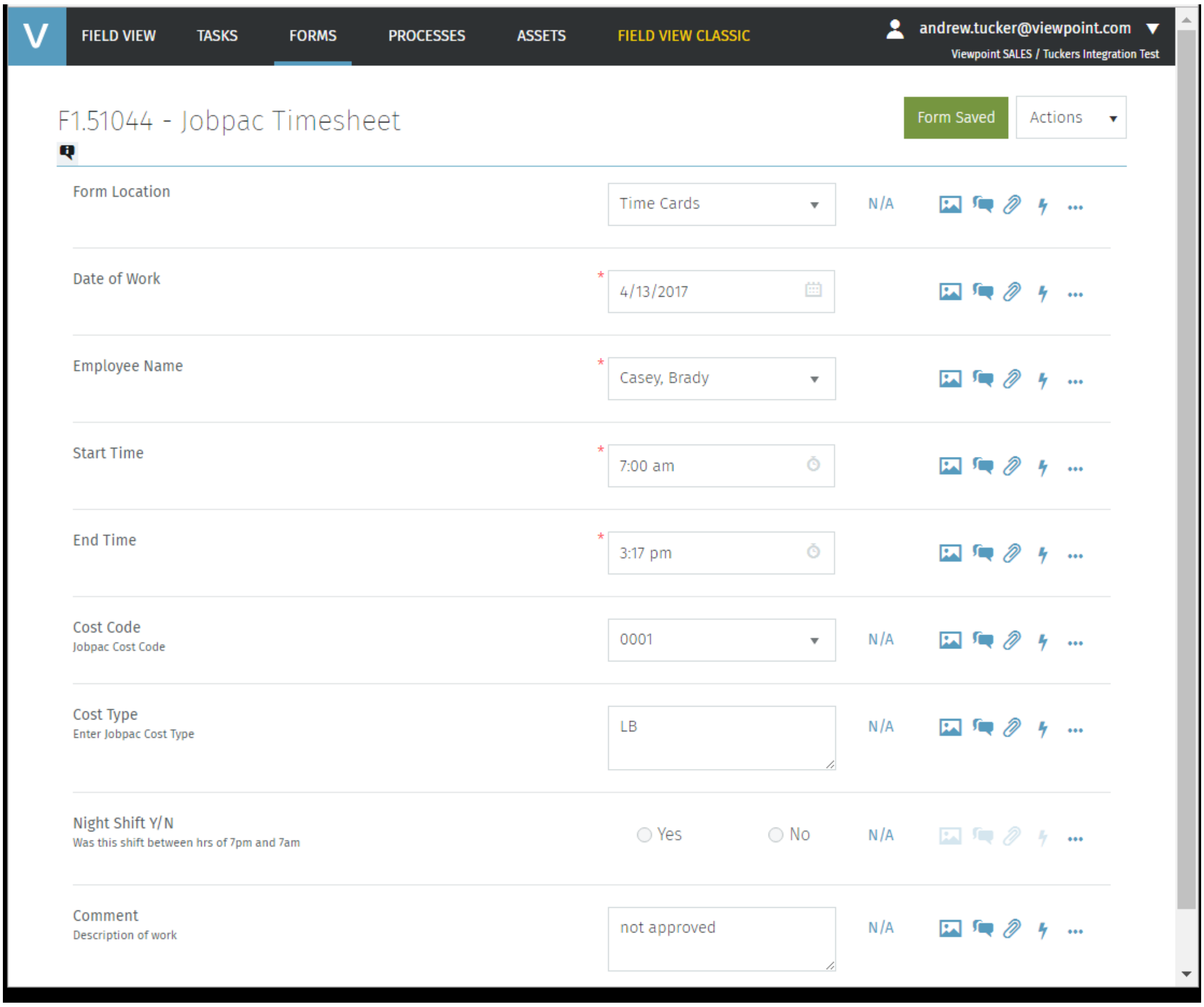
The next section describes specifically for the Timesheet Integration how you might set up a field View Form for Time capture and how it is seamlessly interfaced to Jobpac.

Note the time capture for this interface is designed to be by Job, by Employee, by day, by Unit of work. It can be thought of as a time card and can be subject to any approval workflow that you design in Field View. Only Completed forms will be interfaced.

Note : Timesheet Integration is designed to be used only with Standard Jobpac Job Based ETS. Contact your consultant if you are unsure what method of Time-sheeting you use in Jobpac. It would also be advised to contact your Jobpac Consultant for advice on initial form setup if you are unsure.

Field View - Time Card Form Creation

Below is an example of a Field View Form to capture time, suitable for the Jobpac Connect Interface.



Your field View form can be designed in any way/order that you want as long as you have the following mandatory fields. Some fields are also noted as optional below or alternate to mandatory fields, but may help in your time collection. You may also capture additional information on your forms that will not be interfaced to Jobpac but will be kept on the original Timecard captured and stored in FV.

Remember also your Field View Form Questions can be tailored to suit your personal preference.

See a description of our example Form Questions below.

Form Question	Description	Type
Form Location	Optional field. All Forms stored in any location will be interfaced but you may for example keep all your timecards in one location in Field View eg. Site Office	O
Date of Work	This field represents the Date of the unit of work	M
Employee Name	This field is to capture the full employee name. If it exactly matches the Employee name in Jobpac the Employee code will also be automatically matched. As an alternate to an Employee name field you could equally capture Employee Surname and Employee First name in two separate fields	M,A

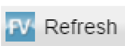
Start Time, End Time	Period of work. Equally and alternatively you could capture the number of hours worked in a single field.	M,A
Cost Code	Optionally you can capture and bring back to Jobpac the Cost Code of work if known. It is not essential as the costing information can be applied later in Jobpac based on the description of work	O
Cost Type	Optionally you can capture and bring back to Jobpac the Cost Type of work if known. It is not essential as the costing information can be applied later in Jobpac based on the description of work	O
Comment	Description of work or additional Comment. You may want to voice record a message into this field to help them in the office and/or support the time entry eg "Night Shift" or "Formworking"	O

Jobpac Connect - Job Based ETS Processing

The Field View Integration for timesheets has been built into Jobpac Connect's standard "E-TS Entry by Job." Essentially there is no difference in the standard operation of this timesheet entry program other than the new feature to upload to the timesheet directly from Field View. We call this option "Field View Refresh" and the operation is described below.

The Interface is suited to time collection in the field, on site, by job, by employee, by day.

Note : It is assumed before we continue that you have already mapped the TIMESHEET Interface Point as described in setup sections.

When the 

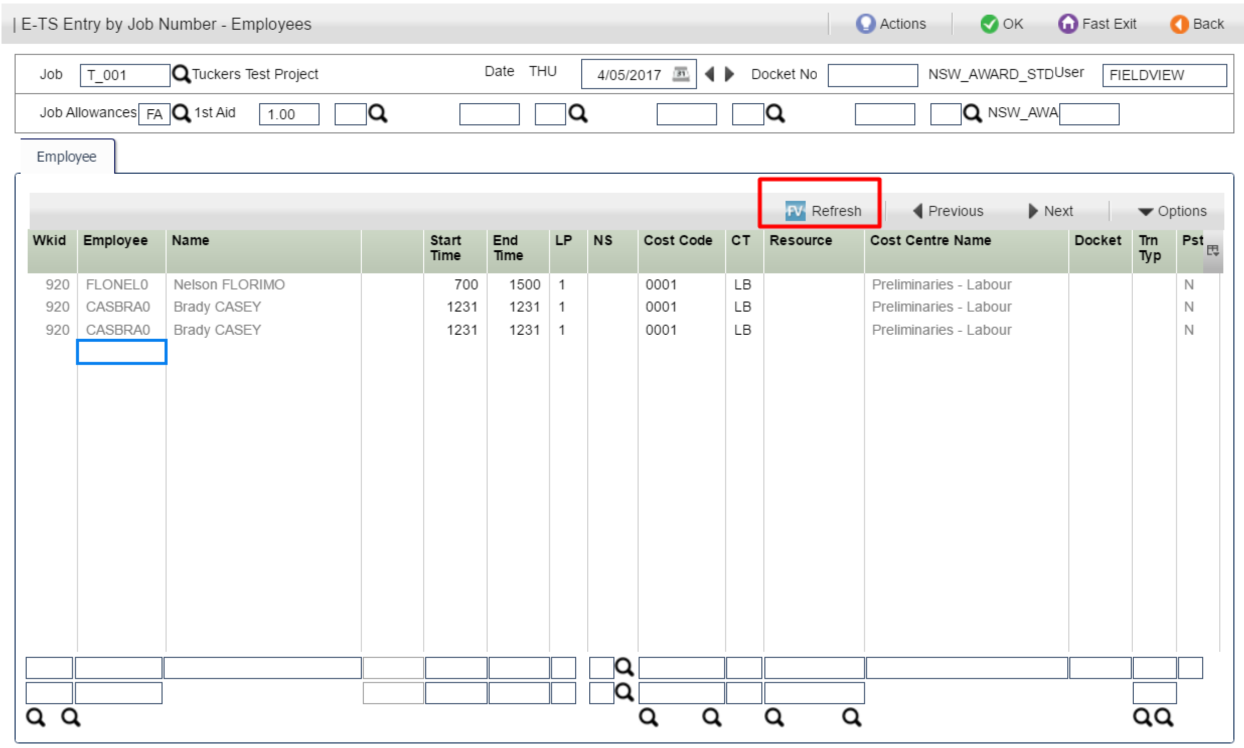
button is selected, web services will be activated to dynamically bring down all completed Time Card Forms that have been mapped to the TIMESHEET interface point, from Field View directly into the Jobpac Job Based ETS entry.

Technical Note: Web services will dynamically retrieve all completed timesheets from Field View for the number of days specified in a System Parameter. This is by default the last 7 days unless specifically overridden. But normally you would expect time to be interfaced on a daily basis from time captured on the previous day.

Note: If Auto Refresh Jobs are setup data should already be populated but you may still want to refresh to ensure that you capture even the latest Field View Updates depending on the frequency of your auto refresh Jobs

The standard Jobpac Connects' E-TS Entry by Job screen is shown below. Simply click on the FV Refresh button to refresh from dynamically Field View. (There is also an upload option in the Actions list) Then wait for the spinning activity icon to complete which may take a few seconds depending on volume, and then click [OK] to validate and save the downloaded data.

Once the data has been validated and reviewed simply perform the normal ▶ "Post Preview" Action option for award interpretation and Post. (Refer to the Payroll E-TS Entry by Job Tech Ref Guide for a full description of this timesheet operation in Jobpac)



Screen Field descriptions and usage notes described below.

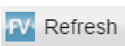
Field Names	Description	Type
Employee, Name	Employee names from Field View forms are intelligently matched to Jobpac Employee names and if a match is found the Employee code will be retrieved automatically. If there is no match then the name will still be brought in, you will be positioned to the field in error, and you will be able to scan and select the correct Employee code.	E
Start Time, End Time	Review start and finish times but note if you are using hours entry instead of start / finish time entry then this is catered for as well	E
LP, NS	Lunch penalty and Night shift flags are not mapped in the first pass of this integration but may be later. You can apply rigour	E

	to the data here if different to the defaults based on comments	
Cost Code, CT	Cost Code and Cost Type will also be retreived if mapped. If the Cost centres are not valid or blank, then you will be positioned to this field in error and you can scan and select for the cost centre required. If a match to the Jobpac Cost centre is not found then the comment from the timesheet will be brought into the Cost centre name field to assist the user with coding.	E
Cost Centre Name	If a Cost Centre match is made then this field will represent the Cost Centre name. If there is no match the Comment from the Field View Time Card Form will be shown in this field to assist in coding.	C
Pst	Note the status in the Posted status Column will be “I” when first interfaced. After clicking [OK] validating all the data this status flag will change to “N”. After normal Post preview and award interpretation the status will change to “Y”	C

New E-TS Entry by Job Unposted Time Enquiry

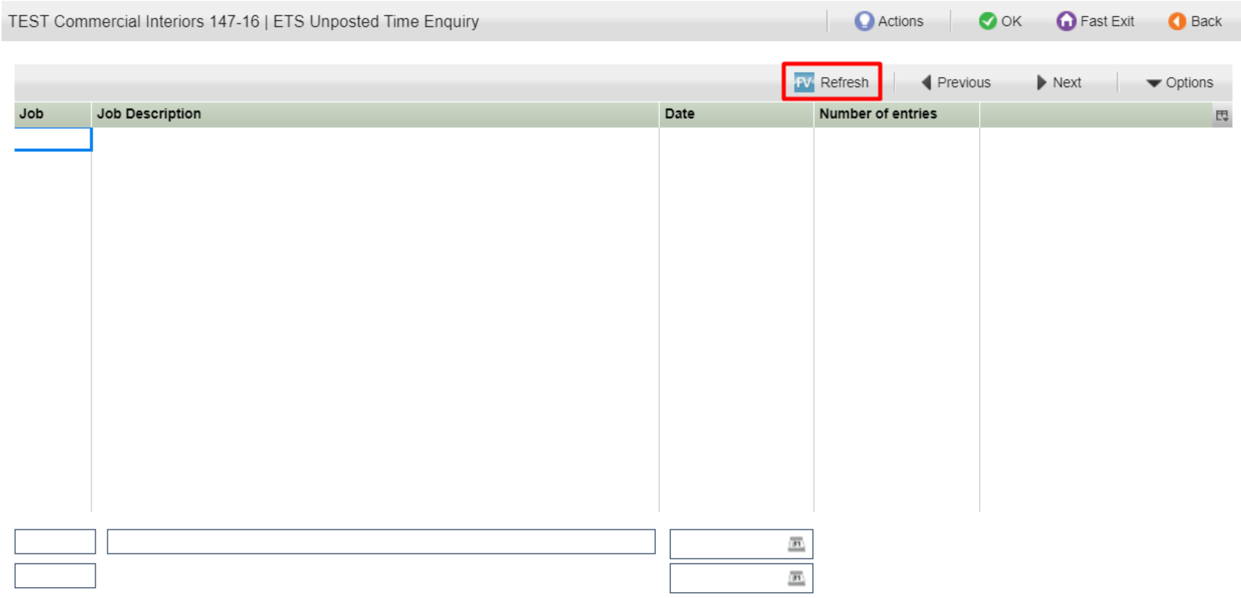
A new enquiry is available as an entry point to the standard E-TS Entry by Job. This screen is useful to show any unposted time entries that may still require processing. It is particularly useful with the FV Integration so the user can easily see if time has been interfaced from prior days for any particular Job.

The user can simply select the Job and day and go directly to that day sheet to complete processing.

This screen also has a 

button as shown below.

> *Technical Note: Refer to Appendix 1 for Menu Setup notes on this new front end which incidentally can be used without the FV Interface too.*

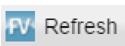


Defects, Site Instructions & NCR Integration Operation

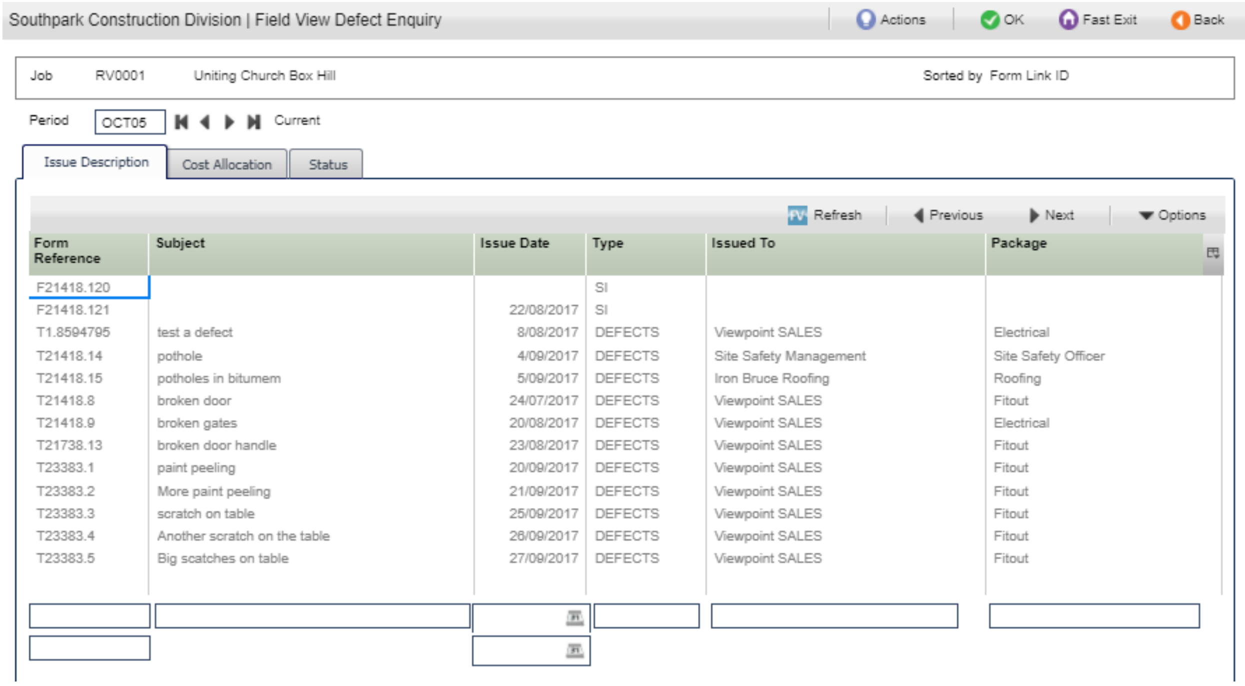
The next section describes specifically the Defects, Site Instructions and Non Conformance Reports Integration and the features that are available.

Defects, Site Instructions and Non Conformance Reports would normally be set up as Tasks in Field View and are similar in purpose though they may be reported differently or actioned differently financially or otherwise. In this integration you will use a purpose built and new *Defects, Site Instructions & NCR Register* in Jobpac Connect. If these Tasks are mapped through Interface Points (refer to set up sections of this manual) then they will be interfaced to Jobpac where you can then monitor their status or view them from Jobpac without having to open Field View from the office. You can also action them in the new register if there is to be a financial impact either by converting them to Variations or to Forecast Cost impacts in the PMW.

Navigate to the new *Defects, Site Instructions & NCR Register* in Jobpac Connect and you will see the screen as shown below.

When the 

button is selected, web services will be activated to dynamically bring in all recently created tasks and forms that have been mapped accordingly. Refreshing from Field View will also update the Status on Tasks that have already been interfaced if their Status has changed in Field View.


Southpark Construction Division | Field View Defect Enquiry
Actions OK Fast Exit Back

Job RV0001 Uniting Church Box Hill Sorted by Form Link ID

Period OCT05 Current

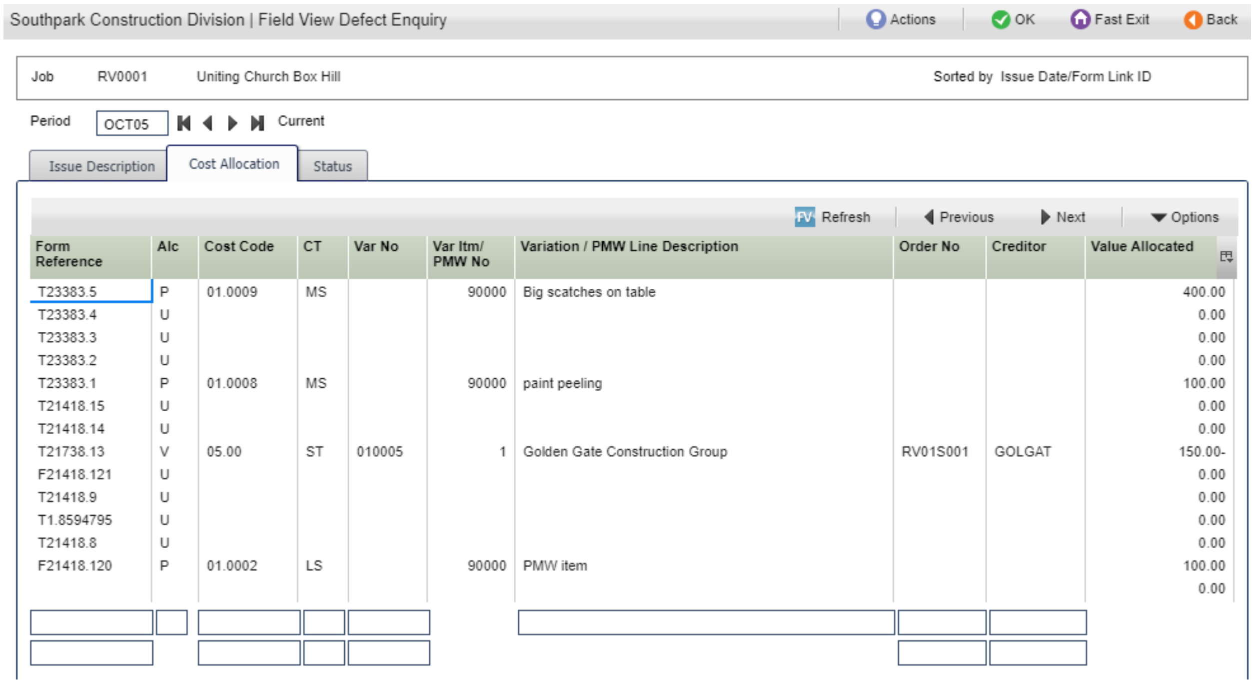
Issue Description | Cost Allocation | Status

Refresh Previous Next Options

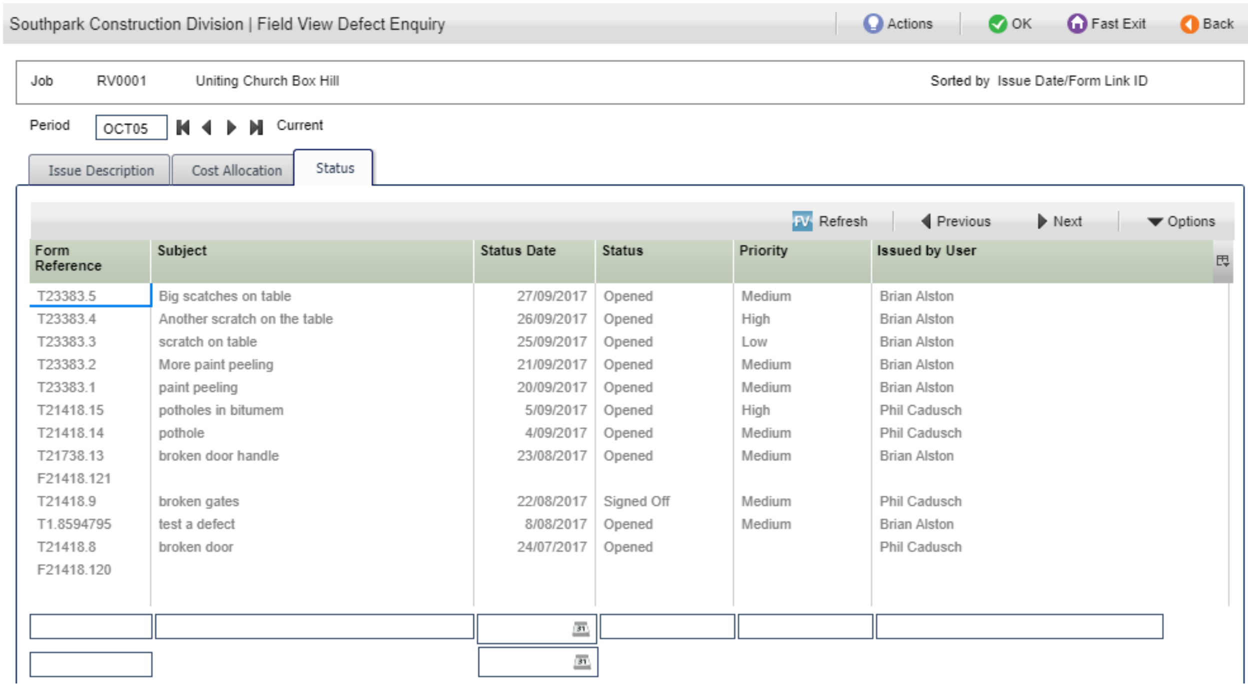
Form Reference	Subject	Issue Date	Type	Issued To	Package
F21418.120			SI		
F21418.121		22/08/2017	SI		
T1.8594795	test a defect	8/08/2017	DEFECTS	Viewpoint SALES	Electrical
T21418.14	pothole	4/09/2017	DEFECTS	Site Safety Management	Site Safety Officer
T21418.15	potholes in bitumem	5/09/2017	DEFECTS	Iron Bruce Roofing	Roofing
T21418.8	broken door	24/07/2017	DEFECTS	Viewpoint SALES	Fitout
T21418.9	broken gates	20/08/2017	DEFECTS	Viewpoint SALES	Electrical
T21738.13	broken door handle	23/08/2017	DEFECTS	Viewpoint SALES	Fitout
T23383.1	paint peeling	20/09/2017	DEFECTS	Viewpoint SALES	Fitout
T23383.2	More paint peeling	21/09/2017	DEFECTS	Viewpoint SALES	Fitout
T23383.3	scratch on table	25/09/2017	DEFECTS	Viewpoint SALES	Fitout
T23383.4	Another scratch on the table	26/09/2017	DEFECTS	Viewpoint SALES	Fitout
T23383.5	Big scatches on table	27/09/2017	DEFECTS	Viewpoint SALES	Fitout

Field Name	Description	Type
Form Reference	This is Form or Task number created in Fieldview	C
Subject	Subject details recorded in Fieldview	C
Issue Date	Date item was recorded in Fieldview	C
Type	Defect, SI (Site Instruction) or NCR (Non-Conformance Report)	C
Issued To	Person or Subcontractor assigned responsibility to resolve this item	C
Package	Trade or Area of the Project issue relates to	C

Additional tabs display further information for Cost Allocation and Status as described below.



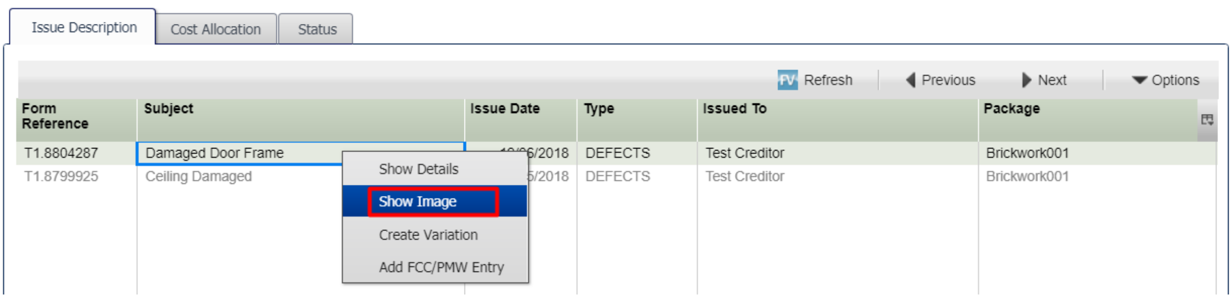
Field Name	Description	Type
Form Reference	This is Form or Task number created in Fieldview	C
Alc	(P)MW entry, (U)nallocated or (V)ariation	C
Cost Code & CT	Cost Centre where Allocation is against	C
Var No	Variation number	C
Var Itm/PMW No	Defect, SI (Site Instruction) or NCR (Non-Conformance Report)	C
Variation/PMW Line Description	Details of the item added	C
Order No	Subcontract Order related to the variation	C
Creditor	Creditor code of the relevant Subcontractor	C
Value Allocated	Amount of the PMW entry or Variation	C



Field Name	Description	Type
Form Reference	This is Form or Task number created in Fieldview	C
Subject	Subject details recorded in Fieldview	C
Status Date	Date item was last updated in Fieldview	C
Priority	Defect, SI (Site Instruction) or NCR (Non-Conformance Report)	C
Issued by User	Person who recorded the Task or Form	C

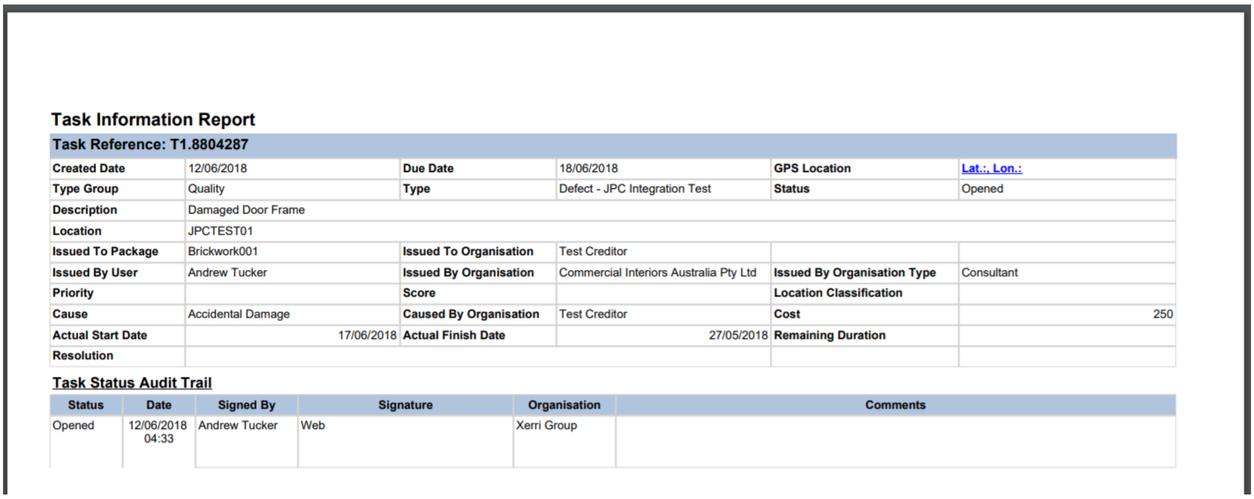
Show Image

Right Click on ► *"Show Image"* as shown below to view the original Form/Task from Field View as a PDF.



This Selection option will show the original Task that was captured in Field View in pdf format along with any photographic evidence captured on the Task. This could be useful for attaching to SC Payment Authorisations, Reasons for claim authorisation differences or Variations that you create in Jobpac, via the Content Viewer.

The Form displayed will look similar to below.



Task Information Report

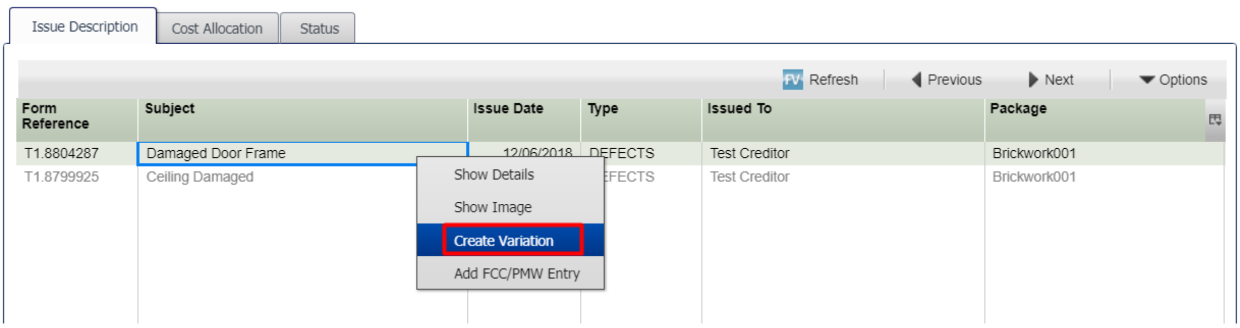
Task Reference: T1.8804287					
Created Date	12/06/2018	Due Date	18/06/2018	GPS Location	Lat.:, Lon.:
Type Group	Quality	Type	Defect - JPC Integration Test	Status	Opened
Description	Damaged Door Frame				
Location	JPCTEST01				
Issued To Package	Brickwork001	Issued To Organisation	Test Creditor		
Issued By User	Andrew Tucker	Issued By Organisation	Commercial Interiors Australia Pty Ltd	Issued By Organisation Type	Consultant
Priority		Score		Location Classification	
Cause	Accidental Damage	Caused By Organisation	Test Creditor	Cost	250
Actual Start Date	17/06/2018	Actual Finish Date	27/05/2018	Remaining Duration	
Resolution					

Task Status Audit Trail

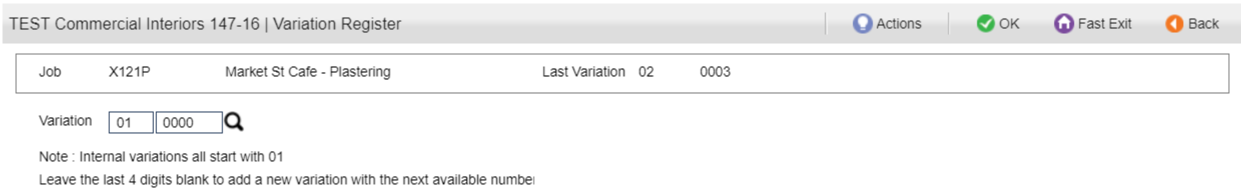
Status	Date	Signed By	Signature	Organisation	Comments
Opened	12/06/2018 04:33	Andrew Tucker	Web	Xerri Group	

Create Variation

Right Click on ▶ *"Create Variation"* as shown below to create a new, or link an existing variation to a Task. This is useful for Site Instructions or Back charge events where the Defect or SI captured in the field has a financial impact that needs to initiate a variation workflow.

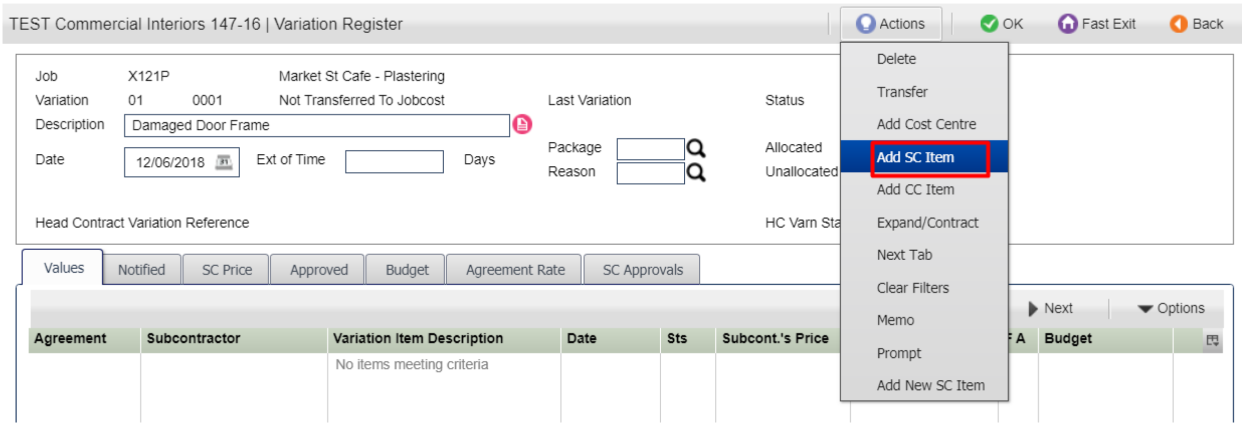


You will be taken to the *Variation Register* as shown below. Ensure the Variation prefix is populated with either "01" for Internal Variations or "02" for External Variations and then either Add a new variation with [OK] or scan and select an existing variation if you want to add a new variation item only

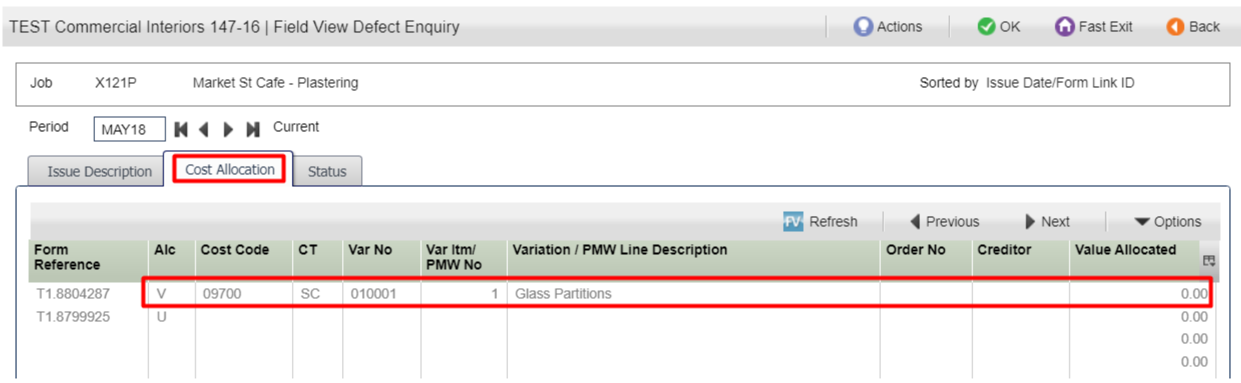


You can see from the screen below that normal Jobpac Connect Variation operations continue from here and it is assumed in this document that you are familiar with this process. At this stage you can proceed to add your new SC Variation Items or Cost Centre Variation Items as desired.

Expected Cost information, if captured in Field View Task, will be brought into new Variation items as a suggested budget or assessed value.



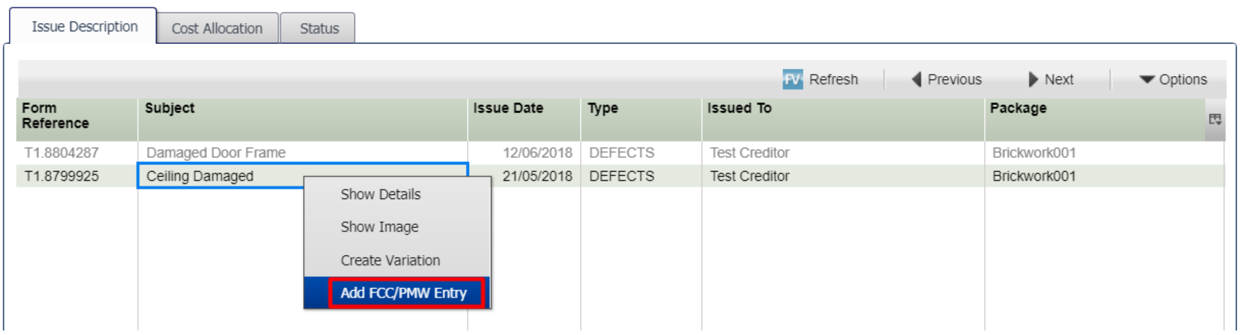
Use Back to return from the *Variation Register* to the *New Defect, SI and NCR Register.* If you then click on the Cost Allocation Tab you will see that the Task now has an Allocation type of "V" to indicate that it has been linked to a Variation. Other Variation Item, Cost Centre and SC Order information will also show on this screen. You can see an example of a Task that has been linked to a Variation on the Screen shot below noting that the Cost Allocation Tab has been selected.



> *Note : if you have already linked a Task to a Jobpac Variation, then selecting the "Create Variation" option again on that task will take you immediately into the existing Variation that it has been linked to.*
>
> *Note : also that it is not possible for a Task to be linked to both a Variation and a PMW entry via this screen. If you select the "Add FCC/PMW Entry" option on a task that is already linked to a variation Item no action will be taken.*
>
> *Note : If you delete the Variation Item that the task has been linked to then the Task will no longer be linked to the Variation and you can then add to PMW or take other actions as required.*

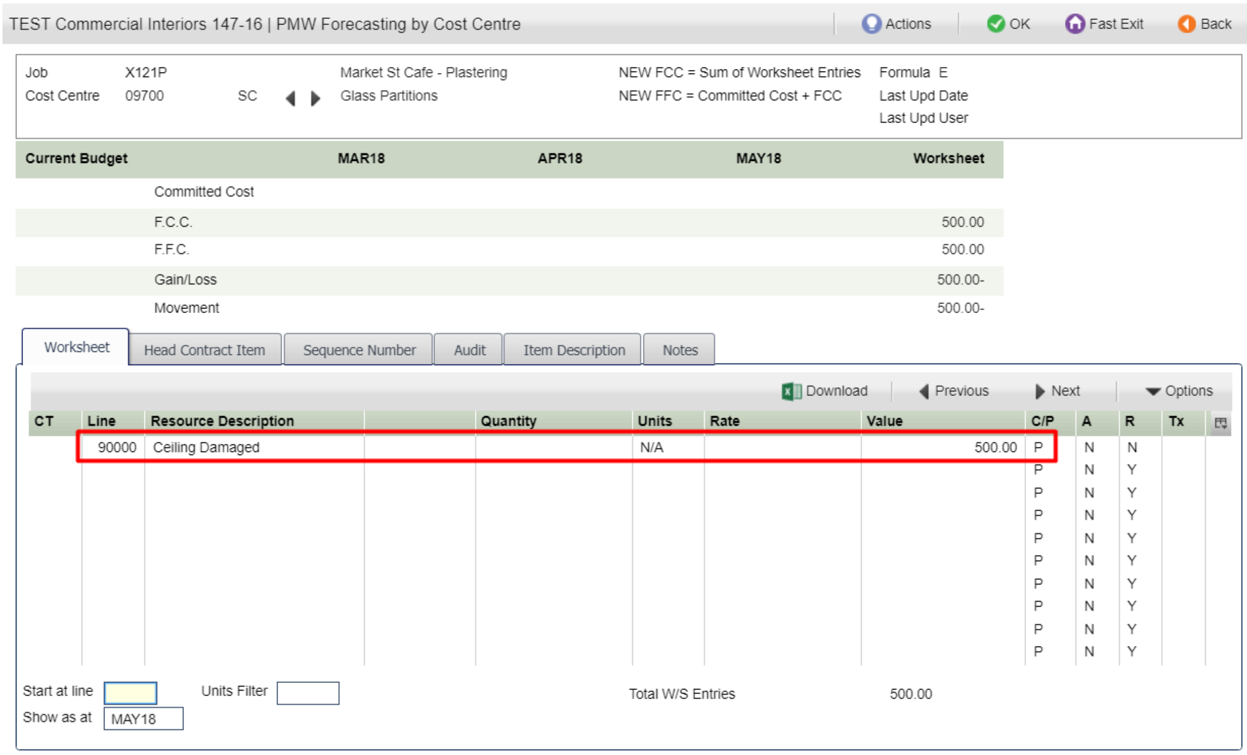
Add FCC / PMW Entry

Right Click on ▶ *"Add FCC / PMW Entry"* as shown below to add a Forecasting entry to the PMW. This is useful if you expect the Defect, SI or NCR to have a cost impact that it is likely will not be covered by a subcontract variation. Perhaps you will need to incur this cost to resolve the Task.

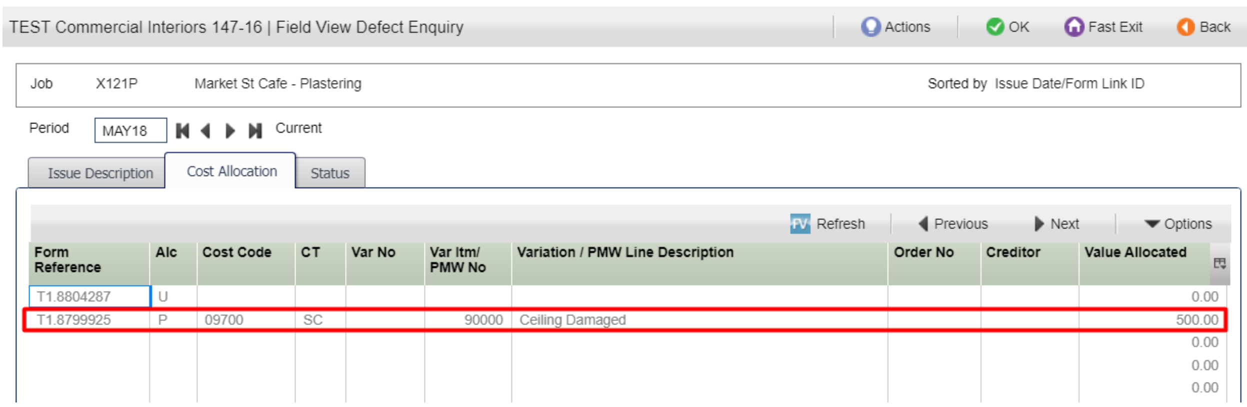


You will be prompted with an *"Add Defect PMW Entry"* as shown below. Scan and select the Cost Centre that you wish to add a PMW entry to noting that the Expected Cost and Description has been brought through as a suggestion from the FV Task. You can override these Values.

Once you have selected a Cost Centre click [OK] to proceed and Confirm and you will be taken into the the PMW for that Cost Centre as shown below. You will see the PMW line added with an Automatic Line number determined by the System Parameter that controls the Starting sequence for Auto entries (Refer to Appendix 1 for Setup) . Note that you may have to Update your Forecast using the Actions Option or Click Enter to update the Forecast with the new Proposed Worksheet entry.



Use Back to return from the *PMW Forecasting Screen* to the *New Defect, SI and NCR Register.* If you then click on the Cost Allocation Tab you will see that the Task now has an Allocation type of “P” to indicate that it has been linked to the PMW for a cost centre. Other Cost Centre, Cost and PMW Item information will also show on this screen. You can see an example of a Task that has been linked to a PMW Item on the screen shot below noting that the Cost Allocation Tab has been selected.

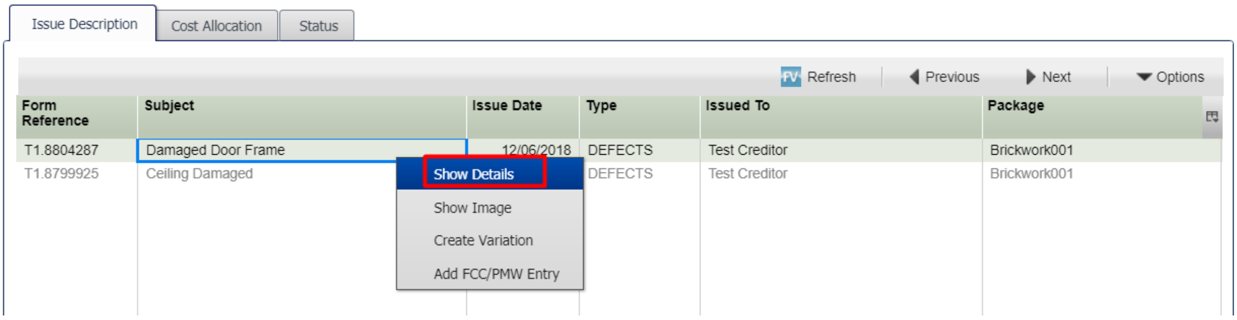


Note : It is not possible for a Task to be linked to both a Variation and a PMW entry via this screen. If you select the "Create Variation" option on a task that is already linked to a PMW Item no action will be taken.

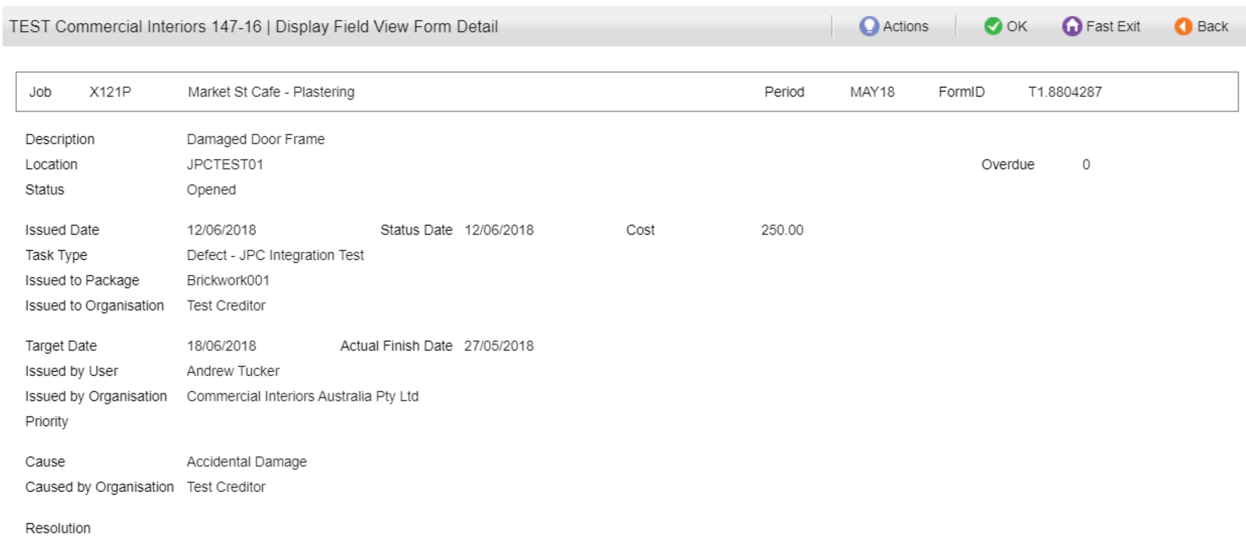
Note : If you delete the PMW Item that the task has been linked to then the Task will no longer be linked to the PMW item and you can then take other actions as required.

Show Details

Right Click on ► *"Show Details"* as shown below to view additional Task details that may not be visible on the 3 tabs of the new Enquiry.



You will see the FV Task Detail Screen as shown below.



Field PO Requisitions Integration Operation

The next section describes specifically the Field PO Requisition Integration operational workflow and the features that are available.

The Field View to Jobpac Connect PO Integration is designed to enable PO Requisitions to be captured in the field on mobile devices and have them seamlessly interface back to Jobpac Connect where the fully Committed PO is created. If a Field PO Requisition satisfies the existing PO Approval Rules that have been defined in Jobpac then a fully committed PO will be created and emailed back to the User who requested it. If Value limits are not satisfied or other errors are found on the Field PO Requisition, then the Field PO Requisition will be trapped for further action in the new *PO Maintenance w/ Field Orders* program in Jobpac Connect. In this new program errors can be fixed or the Field PO can be pushed through for further approval. If further action is required then the Field User will be notified by email.

Note : It is assumed before we continue that you have already mapped the PO Interface Point as described in setup sections.

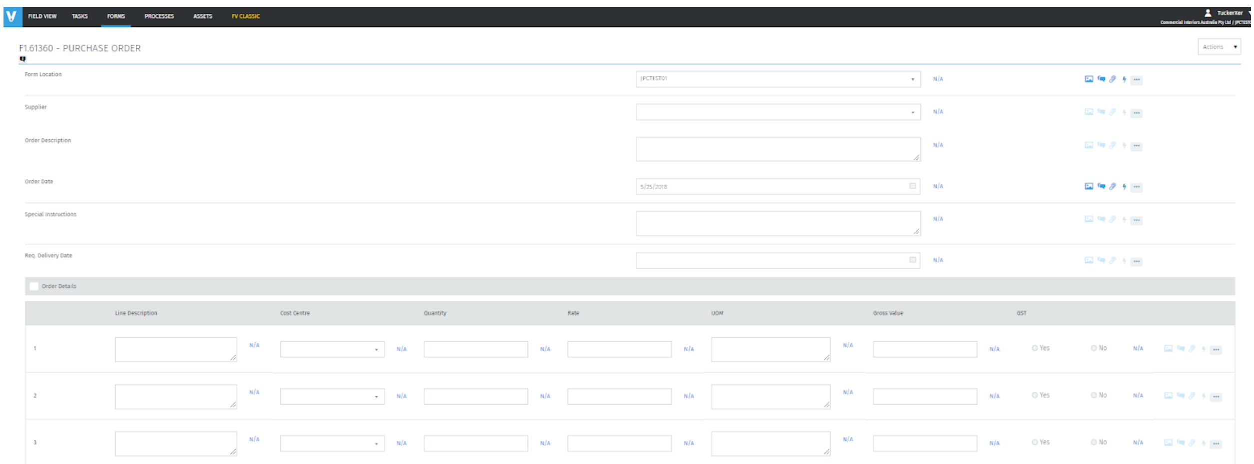
Note : Only Completed PO Requisition Forms will be interfaced from Field View.

Note : Auto PO Numbering must be activated in Jobpac.

Note: The Field PO Integration has been designed for simple low value Field PO Requesition and is subject to the limitations of Form Functionality in Field View. Jobpac Connects' PO Maintenance functionality can be used in parallel should a richer experience be required in certain circumstances such as where many PO Items or access to Budget Controls and Information, Stock Items are required etc.

Field View – PO Requisition Form Creation

Below is an example of a Field View Form for a PO Requisition, suitable for the Jobpac Connect Interface.



Your field View form can be designed in any way/order that you want as long as you have the fields below indicated as mandatory fields (or Alternate Fields). You may also capture additional information on your forms that will not be interfaced to Jobpac but will be kept on the original PO Requisition and stored in FV.

Remember also your Field View Form Questions can be tailored to suit your personal preference.

See a description of our example Form Questions below.

Form Question	Description	Type
Form Location	Optional field. All Forms stored in any location on a project will be interfaced but you may for example keep all your PO's in one location in Field View eg. Site Office	O
Supplier	This field represents the Supplier or Creditor. It is suggested that you use a PDA list and Export Jobpac Creditors to the PDA list as described in this manual. This will create a proper mapping and ensure seamless PO Processing.	M
Order Description	This field is to capture the PO Header Description	M
Order Date	Order Date. It is suggested you default this field to today's date.	M
Special Instructions	Optionally you can capture and bring back to Jobpac special Instructions for the Order just as you can in Jobpac	O
Req. Delivery Date	Optionally you can capture and bring back to Jobpac the Required Delivery Date	O
Order Details	**Suggest Form Table with 1-3 Line Item Details as Below…**	
Line Description	Line Description for the Order	M
Cost Centre	This Field represents the Jobpac Cost Centre and it is recommended that you export project cost centres to a project based PDA list associated with this Question. See Export to PDA instructions in this manual	M
Quantity	Quantity Ordered	M,A
Rate	Gross Item Rate including GST	M,A
UOM	Unit of Measure. If not entered will default to "ITEM" in Jobpac	O
Gross Value	Gross Value of the Line including GST. This field should equal Quantity multiplied by Rate but it is not required to enter both Gross value and a (Quantity + Rate). Value=QTY x Rate calculations will occur in Jobpac.	M,A
GST Y/N	Recommend Default of Y on a Y/N selection. Will default to in Jobpac Y if not entered.	O

Jobpac Connect – Field PO Processing with Advanced Approvals (or without)

As mentioned in the introduction of this section the Field View to Jobpac Connect PO Integration is designed to enable PO Requisitions to be captured in the field on mobile devices and have them seamlessly interface back to Jobpac Connect where the fully Committed PO is created.

If a Field PO Requisition satisfies the existing PO Approval Rules and Value Limits that have been defined, or if Advanced Approvals is not implemented in Jobpac then a fully committed PO will be created and emailed back to the User who requested it. Project Committed Cost values will also be updated.

If Value limits are not satisfied or other errors are found on the Field PO Requisition, then the Field PO Requisition will be trapped for further action in the new *PO Maintenance w/ Field Orders* program in Jobpac Connect. In this new program errors can be fixed or the Field PO can be pushed through for further approval. If further action is required due to approval rules or Errors then the Field User will be notified by email.

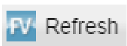
The new *PO Maintenance w/ Field Orders* program described below can replace the previous *Enter Quote Orders* program (once you are comfortable with it) as it offers the same functionality with the addition of an Enquiry in the bottom half of the screen to show field Orders in Error and Enquiry orders requiring further action.

> *Note : Seek consulting advice with Menu Set up if you need assistance setting up new menu items as described in Appendix 1*

In this section we will describe the functionality of the new *PO Maintenance w/ Field Orders* program and how you might handle Field Orders that require further action.

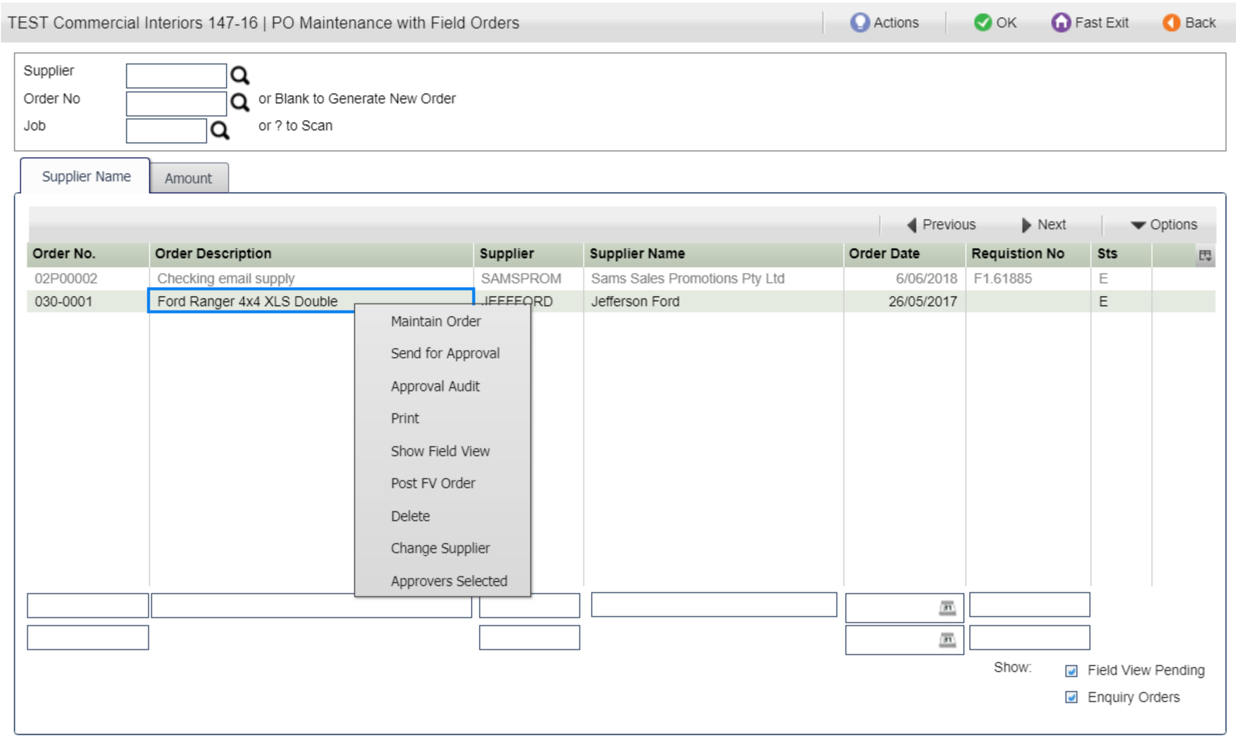
> *Note : It is advised that if using Field PO Requisitions then a daily task is implemented in your business to check for Field PO's that require further action.*

Navigate to the new *PO Maintenance w/ Field Orders* program in Jobpac Connect and you will see the screen as shown below.

When the 

button is selected, web services will be activated to dynamically bring in all recently newly Completed Field PO Requisitions that have not been previously interfaced for Projects where the PO Interface Point has been mapped.

> *Note : It is recommended that an Auto Refresh Job is setup with a short refresh rate to check for new Field PO's particularly if rapid feedback is required to the Field. Field PO's can also be interfaced manually if you desire that control.*



Column Heading	Description	Type
Order No.	This will show the Jobpac Order number or the FV Form Requisition number	C
Order Description	Order Header Description	C
Supplier	Supplier/Creditor that the PO has been entered against	C
Supplier Name	Supplier/Creditor Name	C
Order Date	The Order Requisition Date	C
Requisition No.	Order Requisition Number. This field will contain the Field View Form ID as the Requisition number if entered from the Field	C
Sts	Status E or F. E = “Enquiry Order”. “F”=Field View Pending Order	C
… On the Amount Tab	Additional Fields…	
Job	Jobpac Connect Job Number	C
Gross Amount	Gross Amount of the Order Requisition including GST	C
Raised By	The Jobpac User who Raised the Order Requisition	C
Delivery Date	The Requested Delivery Date on the Order Requisition	C

Entering a New Quote Order

Referring to the Screen above you will see in the top part of the screen the entry fields for Supplier, Order Number & Job. This functionality will work in exactly the same way as the existing menu option to enter Quote Orders. You can either Scan and select an existing order to maintain, or you can enter a New Quote order by populating the Supplier and/or Job, leaving the Order Number blank and clicking [OK]. A New Order will be generated and you can maintain in the normal fashion which it is assumed you are already familiar with.

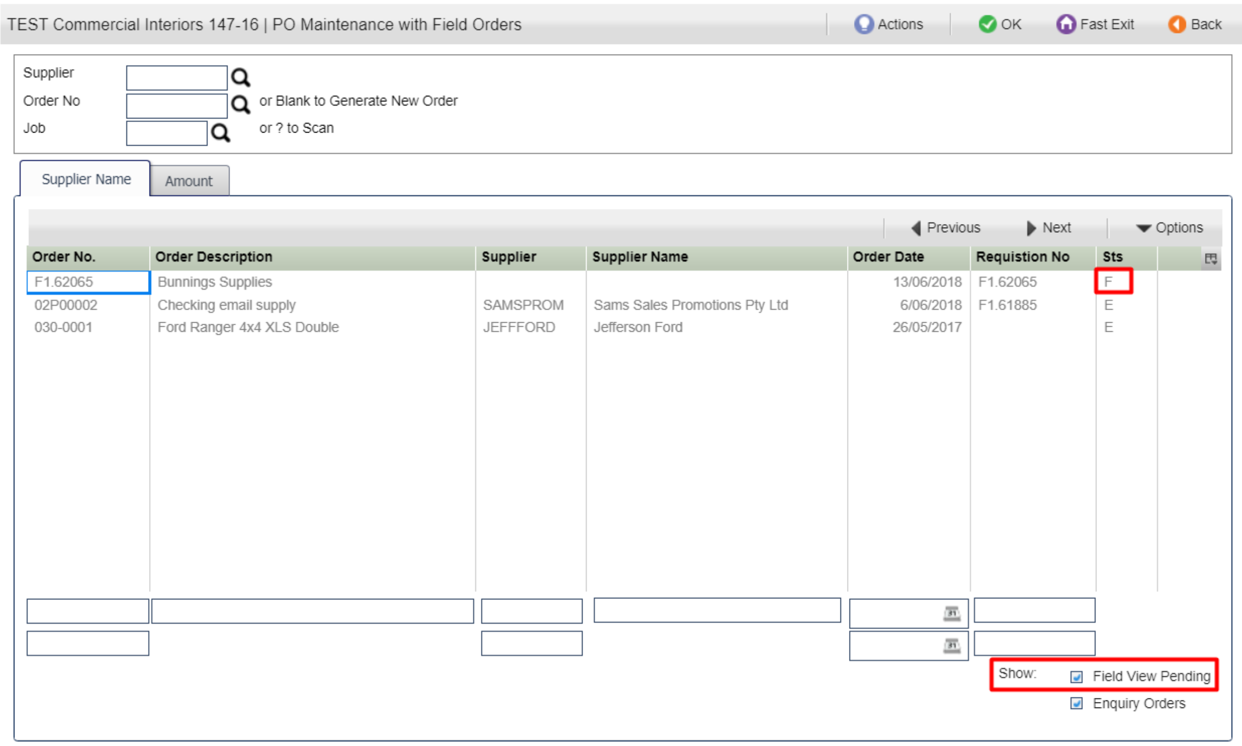
If you are not using Advanced Approvals the top part of the screen will not allow you to enter new Orders and you can simply use this screen to Edit and correct Field orders as described below.

Field PO Requisitions Pending further action

Referring to the Screen below you will see in the bottom half of the screen an Enquiry. This Enquiry will show Field PO Requisitions pending that have been interfaced with an Error marked with a status of “F” as highlighted below. Note that you can also use the Filter at the bottom of the screen to show only “Field View Pending” orders.

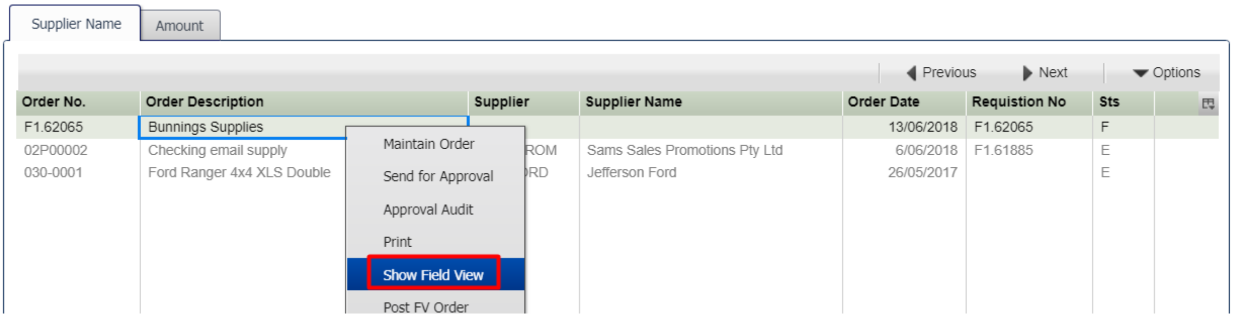
This part of the screen will also show Field PO Requisitions that have been interfaced without error but require further action in terms of additional Approvals if required (If Advanced Approvals is activated). These orders will be marked with a status of “E”. Note that you can also use the Filter at the bottom of the screen to show only “Enquiry” orders. If Advanced Approvals is not activated you will not see any orders of Status “E”.

Read on for the various right click options you can take against these orders.

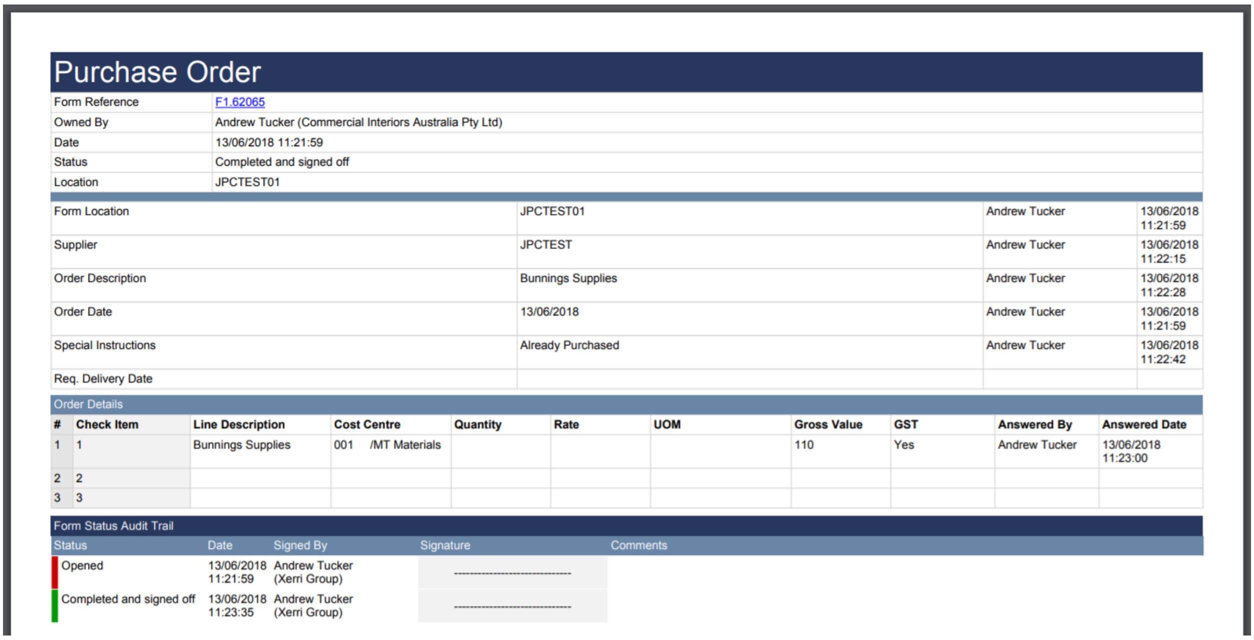


Showing the Original Field PO Requisition

Right Click on the Field PO Requisition and select ► *"Show Field View"* to show the original PO Requisition Captured in Field View.



The original Field View PO Requisition will display as below in pdf format as shown below.



Purchase Order

Form Reference	F1.62065
Owned By	Andrew Tucker (Commercial Interiors Australia Pty Ltd)
Date	13/06/2018 11:21:59
Status	Completed and signed off
Location	JPCTEST01

Form Location	JPCTEST01	Andrew Tucker	13/06/2018 11:21:59
Supplier	JPCTEST	Andrew Tucker	13/06/2018 11:22:15
Order Description	Bunnings Supplies	Andrew Tucker	13/06/2018 11:22:28
Order Date	13/06/2018	Andrew Tucker	13/06/2018 11:21:59
Special Instructions	Already Purchased	Andrew Tucker	13/06/2018 11:22:42
Req. Delivery Date			

Order Details

#	Check Item	Line Description	Cost Centre	Quantity	Rate	UOM	Gross Value	GST	Answered By	Answered Date
1	1	Bunnings Supplies	001 /MT Materials				110	Yes	Andrew Tucker	13/06/2018 11:23:00
2	2									
3	3									

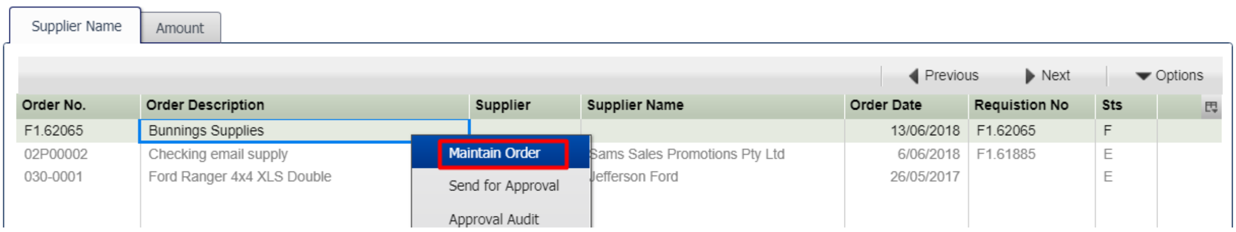
Form Status Audit Trail

Status	Date	Signed By	Signature	Comments
Opened	13/06/2018 11:21:59	Andrew Tucker (Xerri Group)	------------------------------	
Completed and signed off	13/06/2018 11:23:35	Andrew Tucker (Xerri Group)	------------------------------	

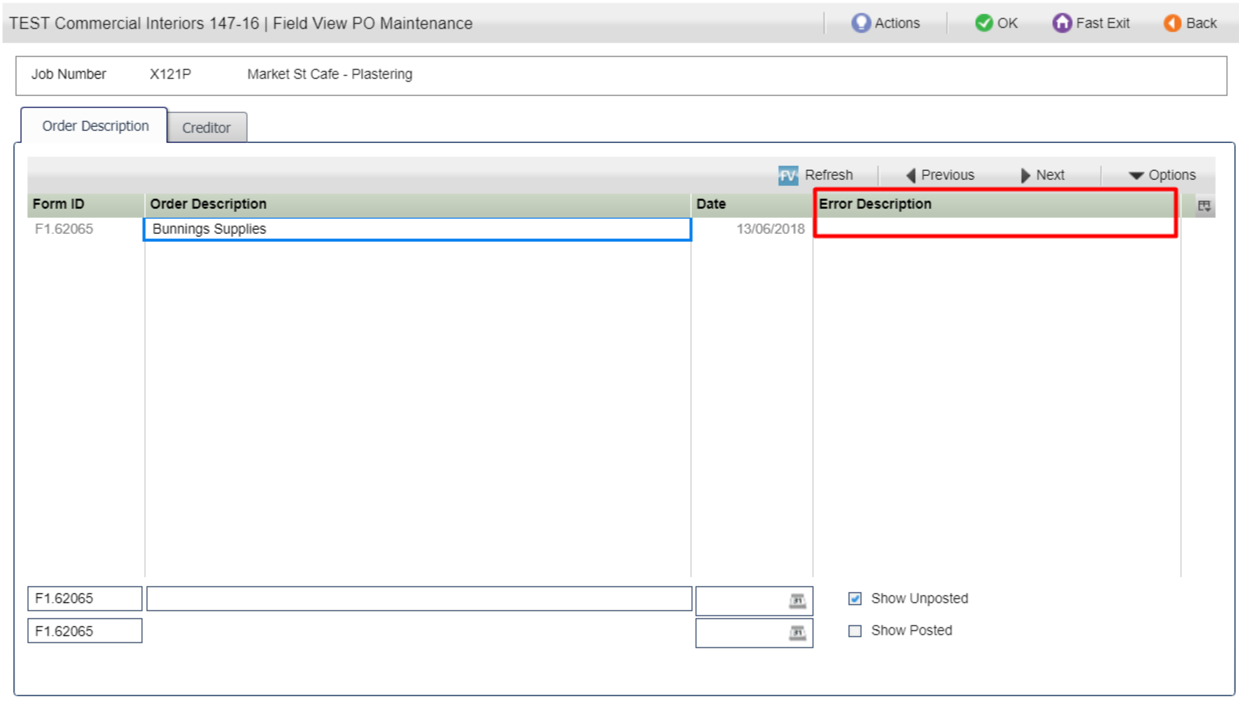
How to fix a Field PO in Error

This Enquiry will show Field PO Requisitions pending that have been interfaced with an Error marked with a status of "F". This type of order will require that you correct the Error and then re-post it.

Right Click on the Field PO Requisition and select ► *"Maintain Order"* as shown below.



If the Order is in status “F” and you take the option to maintain the Order you will be taken to a Maintenance screen as shown below where the Error message will be displayed in the Error Description Column, and you have the opportunity to correct the Error described.

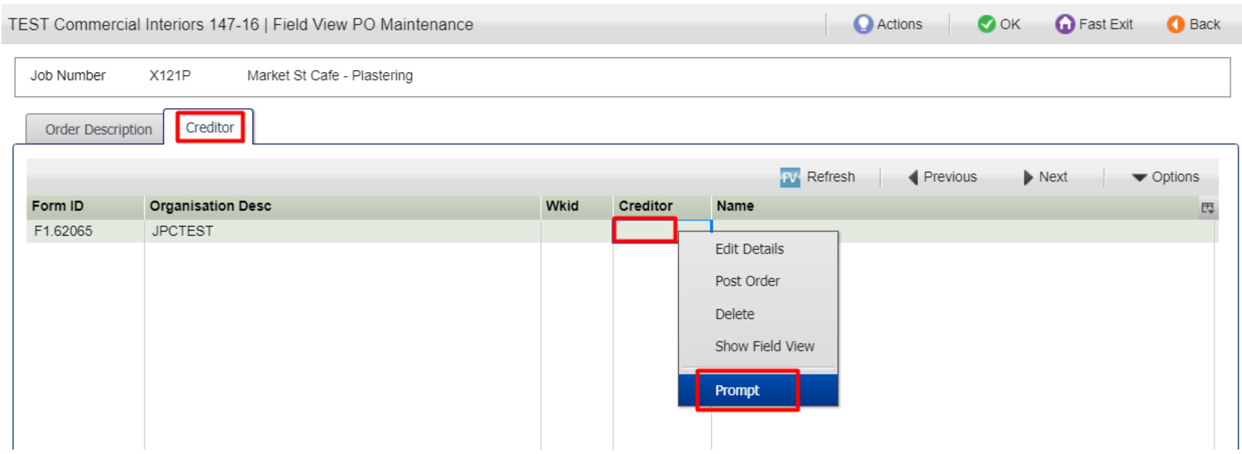


Column Heading	Description	Type
Form ID	This will show the Field View Form ID which will be the same as the Requisition Number	C
Order Description	Order Header Description	C
Date	Order Requisition Date	C
Error Description	A Description of why the Interfaced Order is in Error	C
… On the Creditor Tab	**Additional Fields…**	
Organisation Description	The Supplier /Creditor Name that has come from Field View	C
Work ID	The Work ID for the Creditor in Jobpac Connect	E
Creditor	The Supplier / Creditor Code from Jobpac Connect. This field can be scanned on or Entered manually to correct Creditor Errors.	E
Name	The Creditor Name from the Creditor In Jobpac Connect	C

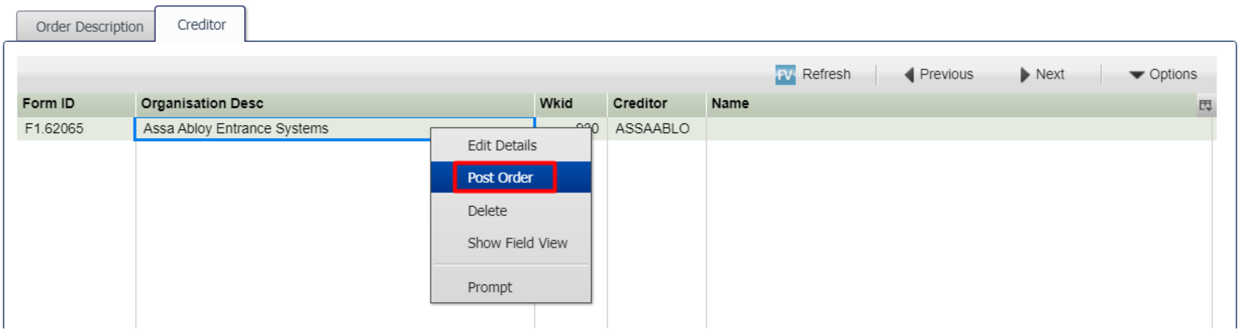
Fixing Invalid or missing Creditor details

With correct setup and selection from an Exported PDA list of Creditors this error should be very uncommon. However the facility is there to correct and invalid or missing creditor should the situation ever arise.

If you are notified of the Creditor being in error then select the Creditor Tab on this screen as shown below and simply scan and select for the correct Creditor. Note on the right click options you can also show the original Field PO Requisition if it helps you decide who the creditor should be.



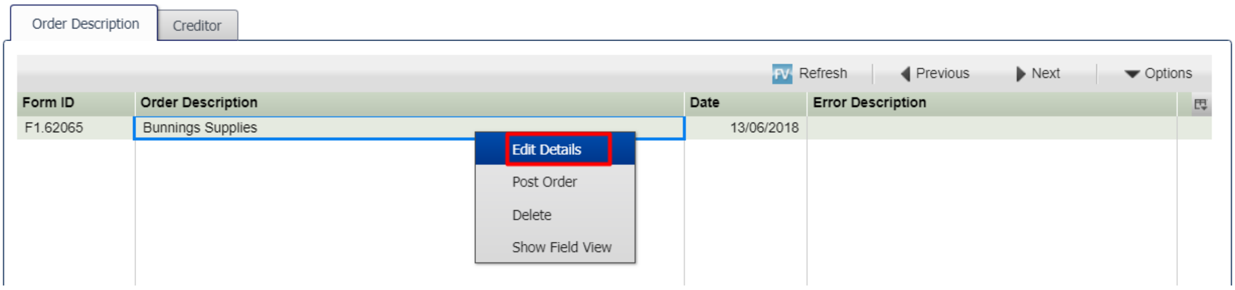
Once you have corrected the Creditor you can go right ahead and re-Post the corrected Field Order by Right Clicking and selecting ► *"Post Order"* as shown below. If Approval rules are satisfied this should create a fully committed order otherwise an Enquiry Order will be created which will need to be pushed down an approval workflow in the normal fashion.



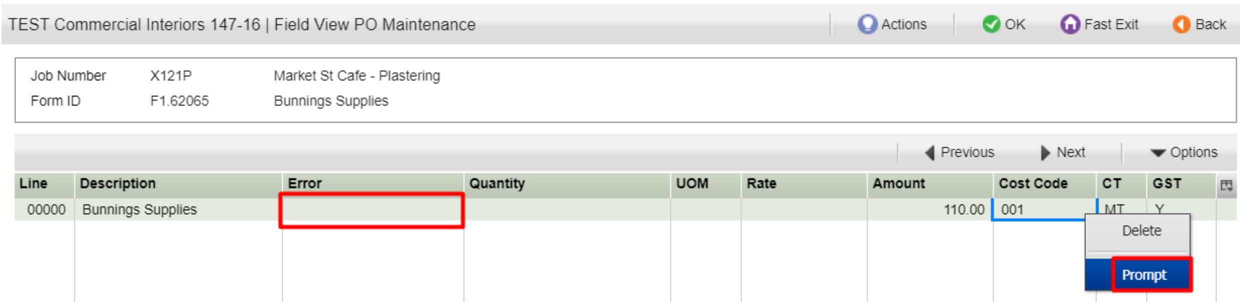
Fixing Other Invalid or Missing Data on the Order Details

If the Error message indicates an error on the Order details such as invalid Cost Centre information or otherwise you will need to Edit the Field Order Details as described below. This should also be rare if the Cost Centre PDA lists have been exported from Jobpac and the PO Form is set up correctly in Field View.

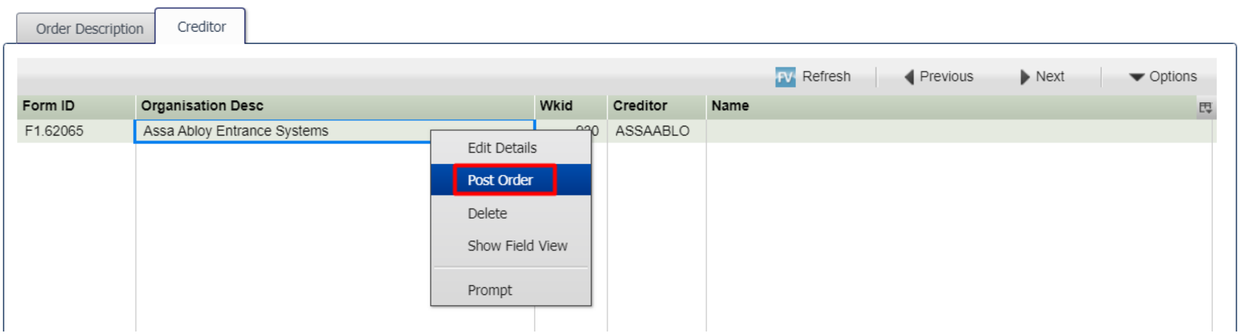
Right Click on the Field PO Requisition from the main screen if the Pending Field PO is in status “F” and select ► *“Maintain Order”*. Then if indicated by the type of Error use right click again to ► *“Edit Details”* as shown below.



You will see the Order Details screen as shown below where you can check the Error Message and make your corrections directly in line. In the example below you can see it is possible to scan and select on the Cost Code field if the Cost Code is in Error.



Once you have corrected the Order Details you can go back from the details screen and go right ahead and re-Post the corrected Field Order by Right Clicking and selecting ► *“Post Order”* as we did previously and as shown below. If Approval rules are satisfied this should create a fully committed order otherwise an Enquiry Order will be created which will need to be pushed down an approval workflow in the normal fashion.

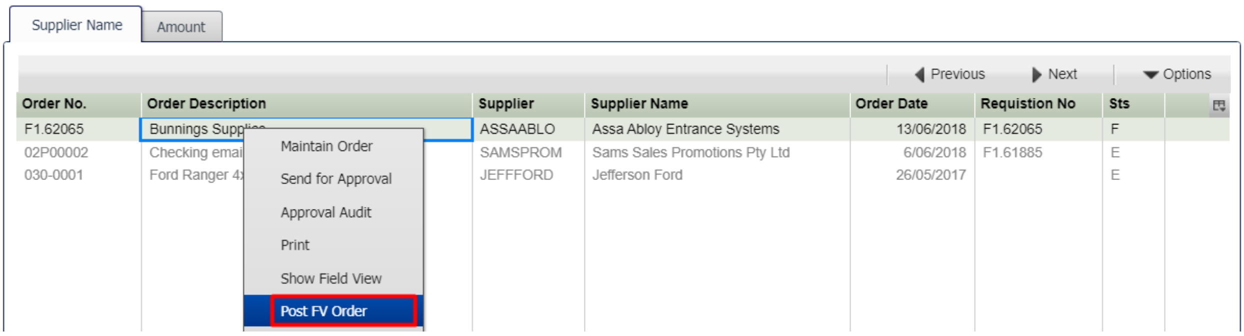


Posting a Field Pending Order

After Navigating to the new *PO Maintenance w/ Field Orders* program in Jobpac Connect or if you have already fixed errors as described above without re-posting yet, then it is also possible to post from the main *PO Maintenance w/ Field Orders screen*

As discussed the Enquiry part of the screen will show Field PO Requisitions pending that have been interfaced with an Error marked with a status of “F”. This type of order will require that you correct the Error and then re-post it.

If you have corrected the errors already you can then Right Click on the Field PO Requisition and select ► *“Post FV Order”* as shown below to re-post from this screen.



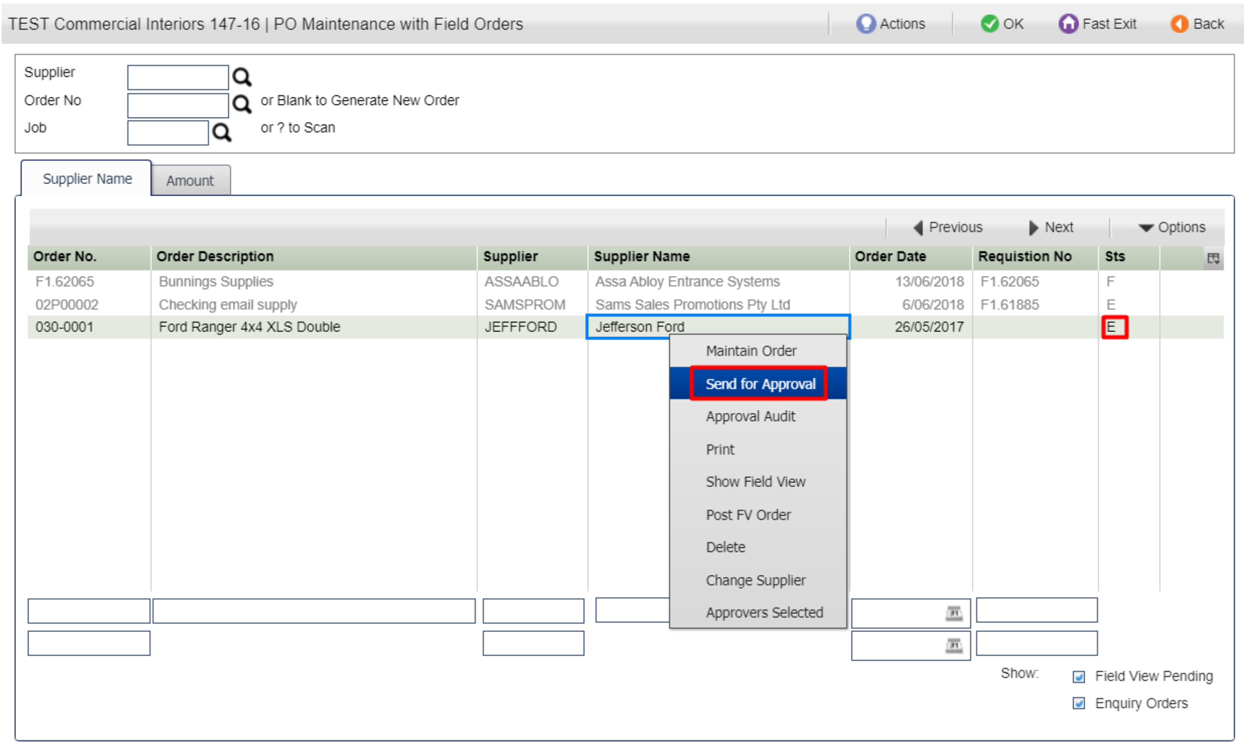
Maintaining or Sending an Enquiry order for Approval (Advanced Approvals Only)

After Navigating to the new *PO Maintenance w/ Field Orders* program. As discussed, the Enquiry part of the screen will also show Field PO Requisitions that have been interfaced with no errors but may not have passed the Approval Rules or Value limit Rules that would allow automatic approval. This type of order will have been interfaced with and marked with a status of “E” as shown below. The Requestor will have been notified by email that further action is required in Jobpac. This type of order will require that you send it for approval in the same way you would a normal Enquiry Order. You can do this by selecting the Right Click option to ► *“Send for Approval”* as shown below.

You could also maintain the order directly from this screen using the right click option to ► *“Maintain Order”* which will take you into the normal Enter Quote Orders Program. This process will not be described here.

Note that the enquiry part of this screen will show ALL Enquiry orders pending further action regardless of if they have come from Field View or entered in Jobpac. You can determine the Field orders because they will have a Field Requisition Number.

> *Note that the enquiry part of this screen will show ALL Enquiry orders pending further action regardless of if they have come from Field View or entered in Jobpac. You can determine the Field orders because they will have a Field Requisition Number.*


TEST Commercial Interiors 147-16 | PO Maintenance with Field Orders
Actions
OK
Fast Exit
Back
Supplier
Order No
or Blank to Generate New Order
Job
or ? to Scan
Supplier Name
Amount
Previous
Next
Options
Order No.
Order Description
Supplier
Supplier Name
Order Date
Requistion No
Sts
F1.62065
Bunnings Supplies
ASSAABLO
Assa Abloy Entrance Systems
13/06/2018
F1.62065
F
02P00002
Checking email supply
SAMSPROM
Sams Sales Promotions Pty Ltd
6/06/2018
F1.61885
E
030-0001
Ford Ranger 4x4 XLS Double
JEFFFORD
Jefferson Ford
26/05/2017
E
Maintain Order
Send for Approval
Approval Audit
Print
Show Field View
Post FV Order
Delete
Change Supplier
Approvers Selected
Show:
Field View Pending
Enquiry Orders

Appendix 1 – Technical Set-up Steps

The following configuration items for Field View to Jobpac Integration should be carried out by a Viewpoint Consultant with knowledge of the customer requirements for integration.

Menu Structure Changes

Most client have their own menu structures, however for the purposes of this manual, the standard menu structure for Jobpac Connect has been updated and is referenced throughout this manual.

All setup of the Field View to Jobpac Project and Form Field Mapping is done from the *System Administration →Configure Modules →Field View Interface …* Menu.

Technical Note: The new menu option should call "FV Project & Form Mapping" - FVJOBMNTP

All setup of the Field View to Jobpac User ID mapping, Employee PDA Lists and Creditor PDA Lists is done from the *System Administration →Configure Modules →Field View Interface …* Menu.

Technical Note: The new menu option should call "FV User & Org. Mapping" - FVCONTMNTP

The addition and maintenance of Web Service parameters is done from the *System Administration → Configure Modules →Web Services Maintenance option. This program will contain All Webservice information for Jobpac and is not exclusive to the Field View Interface. Subsequent section in the appendix will detail the new Web service entries required.*

Technical Note: The new menu option should call "Configure Web Services" – WEBSERVMNP

There is a new entry screen for Job Based ETS that can be used to show unposted Job based timesheets. This is useful when using the Timesheet Integration piece. We have placed at *Payroll → E-Timesheets → ETS by Job Entry New*

Technical Note: The new menu option should call "ETS by Job Entry New" - FVTSENQP

For the new Defects and Site Instructions Register, which we have placed at *Projects →Variations → Defects & Site Instruct.*

Technical Note: The new menu option should call "Defects & SI Register" - FVDFENQP

A new PO Maintenance Front Screen is available "PO Maintenance with Field Orders" This new PO front screen will list Field PO's that have been requisitioned from the field and failed posting due to a data error and will allow correction on the screen. It will also list Enquiry Orders that may require further action such as request approval. This menu option can be added in the most relevant spot for the client and could replace the old PO Enquiry menu option.

Technical Note: The new menu option should call "PO Maint. w/ Field Orders" – FVPOENQP

(There is another program that can be used only to fix FV PO errors by Job FVPOMNTP)

Create the System Field View User required for Jobpac Integration

A Viewpoint consultant will arrange for and setup a Field View user ID and Password that will be used for retrieving the tokens required for web service calls between Jobpac Connect and Field View.

Technical Note: The Field View User ID and Password are configured in the JPC Physical File FVCONFIG in the current Database Library. You will need to run a NAVCHG or UPDDTA and add a record with
*Code = *DEFAULT*
USERID = the FV User set up in Field View
PASSWORD = the FV User Password
FVPDAEMP = Leave Blank (this will be used for the FV Predefined Answer List for Employees)

Field View support (locally in Sydney) can create the required User ID, however the UK Support team must be contacted so that they can give this token unlimited access to call their webservice APIs. If this is not done, the Jobpac calls to Field View will fail as they will be throttled by their service. The email address to request this is: FVSupport@viewpoint.com.

Follow this process:

1. *Setup the field view user with API access in Field View and then request the increase via the support desk.*
2. *Ensure the case is actioned before handing over the integration setup.*
3. *Update the FVINT System Parameter with 99999 from position 15 to signify that the Token Limit has been increased.*

The support request should be something like the example below.

Hello FV Support,
We have setup the following token for an integration to Field View from Jobpac Connect, if you could please set the API limit to 99999 so it does not time out and get throttled, it would be very much appreciated.

Token information below:
Login Name: XxxFVJPC
*Password: **********
Token ID: EDF5AB7FF6659B61F9608819D7F0DD2DEA7F77FD

Your earliest action would be greatly appreciated so that we can get our integration up and running for the customer.

Thanks V Much
Andrew Tucker
Product Manager APAC

Setting up Web services for Field View Integration in Jobpac Connect

A Viewpoint consultant will setup a Field View web service entries to define the web service calls between Jobpac Connect and Field View.

Technical Note: The Web Service Entries are configured in the JPC Physical File WEBSERV in the Control File Database Library. Or Use the Web Services Maintenance option "Call WEBSERVMNP". Records are:

FVGETDOCS
FVTSCONFIG
FVTSFORMS
FVTSTASKS

Note that on VP01, a library called FIELDVIEW exists containing a file called WEBSERVFV – this contains only the current entries for the interface. Running the command

*CPYF FROMFILE(FIELDVIEW/WEBSERVFV) TOFILE(JDxxxCTL/WEBSERV)   MBROPT(*ADD)*

Where JDxxxCTL is the control library and xxx represents the customer ID for the installation.

NB Webservice record Information should not need to change unless servers change.

System Parameters

Should be set up in each WorkID that the interface is to be active in

FVINT – Field View Timesheet Interface

Pos 1 = Y to activate FV Interface in Job Based ETS.

Pos 2-3 = 01-90 to define the number of days to look back for Timesheets in FV. 3 to 7 Days Recommended depending on expected usage. This applies to the manual Refresh buttons. The scheduled Job will look back from last updated date.

Pos 4 = Y to activate Defect, SI, NCR Integration

Pos 5 = Y to activate PO Integration

Pos 6 = Y to activate Cost Centre additions to PDA lists by trigger.

Pos 15-19 = contains 99999 if the API Limit has been increased as part of setup

FVGST – Jobpac GST Default codes to correlate to FV Yes/No flags on PO Integration

Pos 1-2 = Default Code for GST yes (normally A1)

Pos 3-4 = Default Code for GST no (normally A0)

FVPMWL – PMW Start Line for Field View Defects

Number = Start line number for records being created. Suggested to use 90000 or 80000 . Consider other default PMW line number settings such as the default for Variations in the PMW (VARPMW & WSVSLN)

Scheduled Job Entries for Automatic FV Integration

It is advised that Integrations are setup and tested using manual refresh options prior to setting up the automated FV refresh options. Once the Automated Jobs are set up testing is also recommended.

The actual job that will run, based on parameters in FVINT in each WorkID is CALL FVGETALLP which has a delay job of 60 seconds built in.

The command below will add a job schedule entry.

ADDJOBSCDE JOB(FVUPLOAD) CMD(ENVBATCH ENVIRON(VT1) CMD(CALL FVGETALLP) WORKID(001)) FRQ(*WEEKLY) SCDDATE(*NONE) SCDDAY(*ALL) SCDTIME(110000) JOBD(JPSUBSYS/JPSETUP) USER(JOBPACOWNR)

NB Seek assistance from a Technician before setting this Job up to ensure correct parameters are passed as they may vary between customer environments.