Viewpoint Jobpac Connect™

# 2022-R2 (effective 21/05/2022)

## Contents


**Release Overview** 3

**Enhancements** 6

**Roadmap** 6

STP2 6

Refreshed GUI with Trimble colours 6

Documentation Refresh and New Help Documentation Structure 7

Alternate Subcontract Locking Mechanism 7

Add Additional Dates to the Payapps Interface 8

Hide Unused PMW Types in Job Maintenance 8

New Product Scan in Purchase Order Maintenance 9

Enhancements to Payroll Uploads 9

**Suggestion Box & Other Enhancements** 11

Add Bank Name to the Daily List of EFT Report 11

Add Contracts Manager to the JobListing API 11

Add User Name in the User Scan in Job Security by Job. 11

Rejection Text in AP Invoice Approvals 11

Newest to Oldest Sorting Ability in the New AP Enquiry 11

Add Subcontract Retention Column to the Summary Project Status Report 12

Work Order Enhancements 12

Excel Output for Creditor History Report with Totals 13

**Fixes** 14

Module – Accounts Payable 14

Module – Accounts Receivable 14

Module – Business Intelligence (BI) 14

Module – Fixed Assets 14

Module – General Ledger 14

Module – Job Costing 14

Module – Payroll 14

Module – Progress Claims 15

Module – Purchase Orders 15

Module – System Administration 15

Module – Variations 15

Module – Web Services 16

Module – WUI/GUI 16

## Release Overview

For the 2022-R2 Release of Jobpac Connect the Jobpac team focused on the following initiatives…

**Firstly a Welcome to Bhaskar Selvaraju**

I would like to extend a warm welcome and introduce you to our new Director of Development for Jobpac Connect, Bhaskar Selvaraju. This appointment is significant for Jobpac Connect and represents growth in our region and growth in our development team. Bhaskar brings with him a wealth of global technology experience, is based in Sydney, and we are excited to have him on board to help us with our future plans.

**Jobpac Classic Desktop User Interface (UI) Refresh towards Trimble Style**

In this release, we have given the GUI (our desktop client, aka Jobpac Classic) a slight refresh towards Trimble colours and styles. Note, this is likely to be the last update to the Jobpac desktop client as we move towards 100% web for our users. It is likely that the desktop client will move into sunset mode, and be retired from service over the next 18 months or so. If any of your users are still using the old Jobpac Classic, now is the time to begin transitioning them to the Web User Interface (WUI). The Web User Interface provides a whole range of features and an experience that we can not offer in the desktop client such as...

- SSO with the new ViewpointOne ID, soon to become Trimble ID
- User-controlled password Resets
- User Favourites, and Folders in Favourites, allowing your users to construct their own personal menu system
- Embedded Related content with the Document Preview pane.
- Work from anywhere on all top browsers.
- Top of Grid Filters.
- Tabbing in Maintenance screens.
- Full-Screen Zoom and better tablet access.
- Streamlined upload architecture.
- One-click productivity buttons.
- Access to Visual Intelligence Widgets on the Role-Based Landing page if desired.
- And more UX features in almost every release as we take on board Trimble modus.

An official announcement is likely to be made in the coming months. Please reach out if you need assistance through the change. With ~80% of our 10,000+ monthly active users now using the Web User Interface, experience tells us that change management is minimal. This change will mean that we will be able to devote even more resources to the strengths of Jobpac Conect as we continue to grow at a pace and make more trimble cloud connections!

**SSO for Jobpac Connect**

Over the last couple of months we have been helping customers onboard with SSO, that became Generally Available in the 2022-R1 Release on Jobpac Connect. SSO will give our users the ability to sign on with a ViewpointOne ID and access all our Trimble solutions seamlessly. It will also give you the ability to authenticate via Azure AD with the ViewpointOne ID being available in the Azure AD marketplace. We encourage as many customers as possible to begin the transition to the ViewpointOne ID as the first step in an important journey towards Trimble ID **Note: SSO via the ViewpointOne ID is only available in WUI**. Please contact our Support team if you are interested in SSO.

**Supporting product quality.**
Product Quality and Release Quality is something that gets a great deal of focus in Viewpoint Globally and our dedicated QA team is continually building more automated regression tests that can now be run repeatedly over 4 different major browsers. Through additional synthetics we are also continuously testing the speed and success of scripted usage of the product against target outcomes, with automated alerts should success criteria not be met. The last quarter has been no exception, with a raft more automated tests (more than 250 now) and synthetics built by our dedicated QA team.

**Targeted customer enhancements.**
The **suggestion box** and customer funded enhancements play an important part in our roadmap as we want our product to evolve and be shaped in a way that makes our customers and the industry as a whole more efficient. It is interesting to note that of the 80 new features that we have delivered annually for each of the last 5 years on average, just over 50% of those features have come from the suggestion box. We recognise that we can't get to them all, and that your suggestions may not always come to fruition as other priorities can take precedence, but keep 'em coming and continue to vote. We love the participation and look at every one.

**Legislative Update**
**STP 2** is here! With ATO whitelisting received, in this release we make STP2 Generally Available and you can begin your transition. This is the culmination of more than 12 months work and puts us in the first 15% of payroll providers nationally to have a Whitelisted STP2 solution ready. There is a full set of transition notes and some tools to help you with data preparation. These notes are currently under QA and should be ready in time for 20th May in line with the patches included in this release. A Webinar is also scheduled for the last week in May and we will post the registration link in the What's New after deployment of this Release. Remember we have a deferral until 30th June on behalf of all our customers so it will be a fairly tight timeframe to transition. If you feel you will need more time then there are individual deferral options available through the ATO website.

Our **PTA Roadmap** is progressing with 4 new PTA reconciliation reports under construction. These reports will satisfy the QBCC at the touch of a button and are currently target for the R3 Release of Jobpac. We also have a new Trust Journal Type under construction as the first step in our PTA Trust Journal Work Centre that will add an incredible amount of efficiency to your PTA administration.

Regarding ***Payment Times Reporting*** for our Customers over 100 Mil. Our PTRS Report became GA at the end of September 2021 and many of our customers used the new report to successfully upload their submissions. In this release we have upgraded our API connection with Payapps, for those customers using Payapps, to be able to receive the Received Date. As soon as Payapps begin pushing the Recieved date through to Jobpac SC claims this will update the Received date on Jobpac Invoices, which will in turn flow through to the PTRS.

**Ongoing Security and Platform work...**
is a year round effort and this last quarter has been no different. We continue to perform pen testing and security remediation work in line with our SOC2 Type 2 Compliance to which all of our cloud construction solutions adhere to. Our SOC 3 report is available to all our customers at the Viewpoint Security page at this link.
https://www.viewpoint.com/en-au/security/faqs

**Significant development phases for the delivery of major Initiatives.**
Work has continued in the last quarter on a number of multi quarter Roadmap development initiatives including

- True B2B electronic Invoicing with PEPPOL, currently in test and approval phase for AR and AP.

- BPay method Phase2, will include multiple reference numbers and .bpb files for bank upload.
- Bank Feeds, rework of front and for matching and back end for receiving statements from banks.
- PO Amendments development also continues which will allow tracking of multiple amendments to large orders.
- And importantly development of a Jobpac Connect connection to the Trimble Construction One platform continues.

**Roadmap deliverables**

Other Planned Roadmap Items delivered in R2 are detailed below and include of note a refresh of our Jobpac Connect Documentation and Structure of Access. Read on Below for more details.

Kind Regards
Andrew Tucker
Sr. Product Manager Viewpoint APAC

# Enhancements

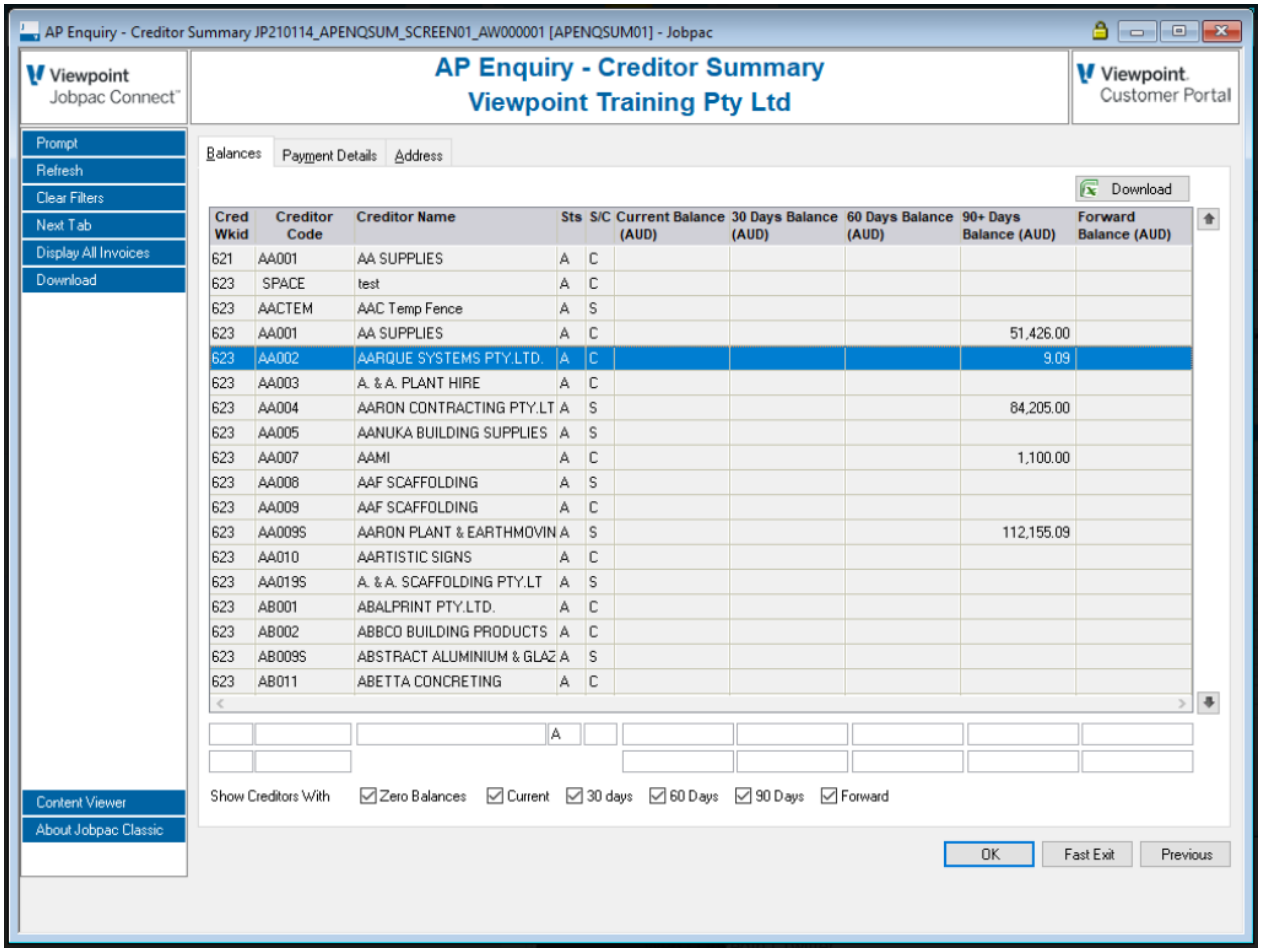
## Roadmap

- ***STP2***

  With ATO whitelisting received, in this release we make STP2 Generally Available and you can begin your transition. This is the culmination of more than 12 months work and puts us in the first 15% of payroll providers nationally to have a Whitelisted STP2 solution ready. There is a full set of transition notes and some tools to help you with data preparation. These notes are currently under QA and should be ready in time for 20th May in line with the patches included in this release. A Webinar is also scheduled for the last week in May and we will post the registration link in the What's New after deployment of this Release. Remember we have a deferral until 30th June on behalf of all our customers so it will be a fairly tight timeframe to transition. If you feel you will need more time then there are individual deferral options available through the ATO website.

- ***Refreshed GUI with Trimble colours***

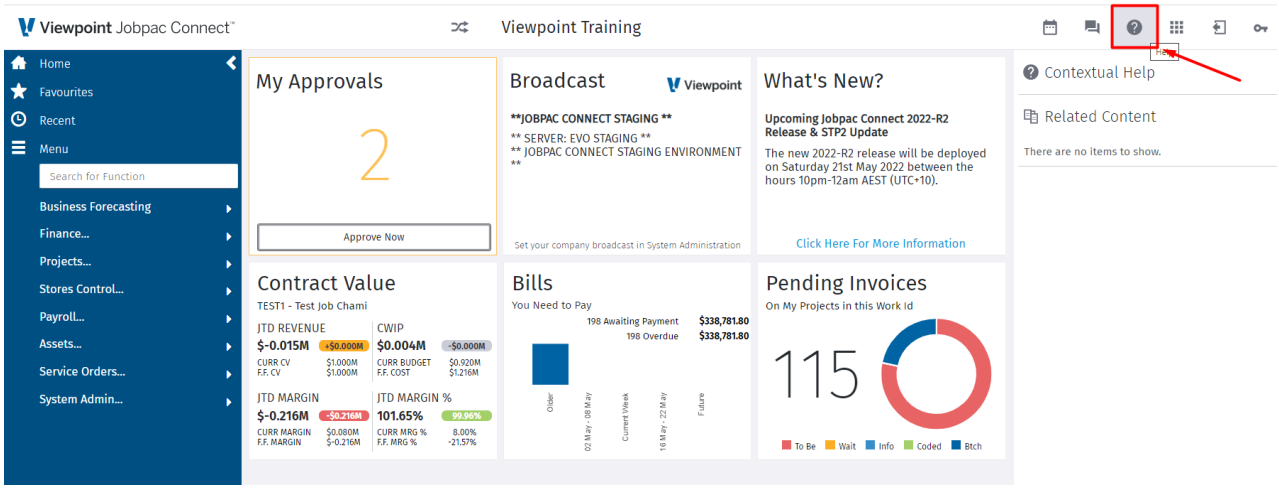
  In this release, we have given the GUI (our desktop client, aka Jobpac Classic) a slight refresh towards Trimble colours and styles. Note, this is likely to be the last update to the Jobpac desktop client as we move towards 100% web for our users.



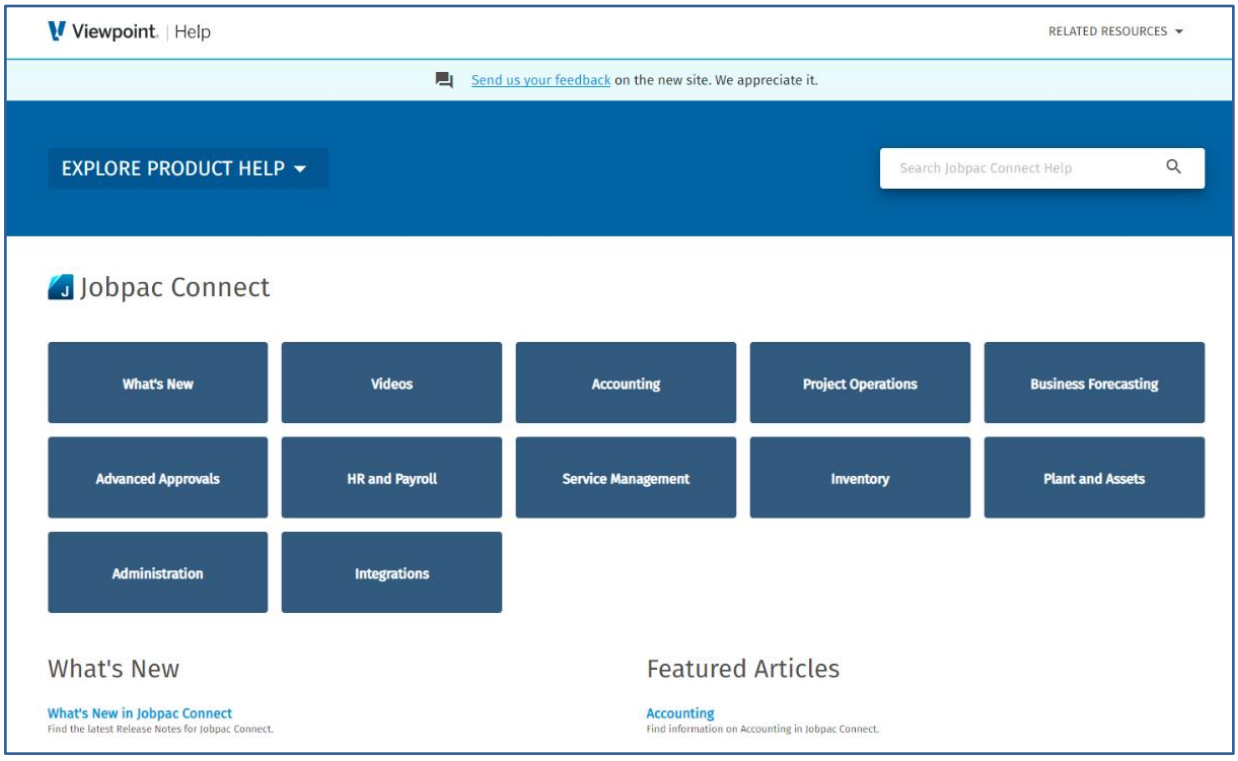
- ***Documentation Refresh and New Help Documentation Structure***

In this release we make available updated documentation for Jobpac with refreshed screenshots and other updates across the full range of Module Guides and Function Guides. You will also notice a new structure via the Help Icon with our Module Guides and Function Guides grouped in a more logical way.

You can access the refreshed guides through the Icon on the top right of your Jobpac screen as shown below. Refreshed documents will also be made available through Contextual Help.




After clicking on Help you will be taken to the help screen as shown below…




- ***Alternate Subcontract Locking Mechanism***

The locking facility in the Subcontract area has been re architected in this Release. Previously Subcontracts could be left in a locked state if sessions dropped out preventing users from accessing an agreement without

first asking an administrator to remove the Lock. With the new architecture Locks are automatically removed in this situation.

- ***Add Additional Dates to the Payapps Interface***

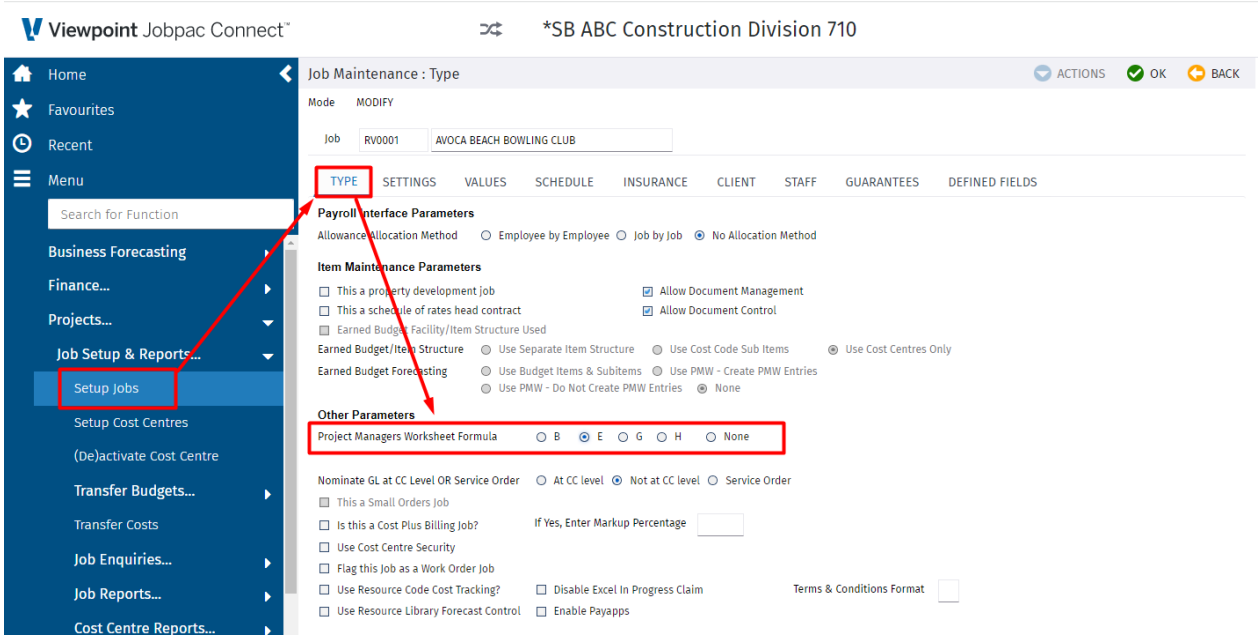
In this release we have upgraded our API connection with Payapps, for those customers using Payapps, to be able to receive the Received Date. As soon as Payapps begin pushing the Recieved date through to Jobpac SC claims this will update the Received date on Jobpac Invoices, which will in turn flow through to the PTRS.

  - We have enhanced the Payapps, SC Claim API to accept the Received date to be passed through with the Payapps Claim and populate the Received Date on the Claim waiting to be posted.
  - A Payment Due date can also be passed through with the Payapps claim.

- ***Hide Unused PMW Types in Job Maintenance***

Legacy default PMW types have been removed from Job Setup as shown below.
PMW Types currently in use include…

| Formula | Definition | Defintion 2 |
|---|---|---|
| B | F.C.C. = Uncommitted Budget + Sum of Worksheet Entri... | F.F.C. = Committed Costs + FCC |
| E | F.C.C. = Sum of Worksheet Entries | F.F.C. = Committed Costs + FCC |
| G | F.C.C. = Your FFC Entry - Committed Costs | F.F.C. = Your Entry |
| H | F.C.C. = Sum of Worksheet Entries | F.F.C. = Cost Of WIP + FCC |

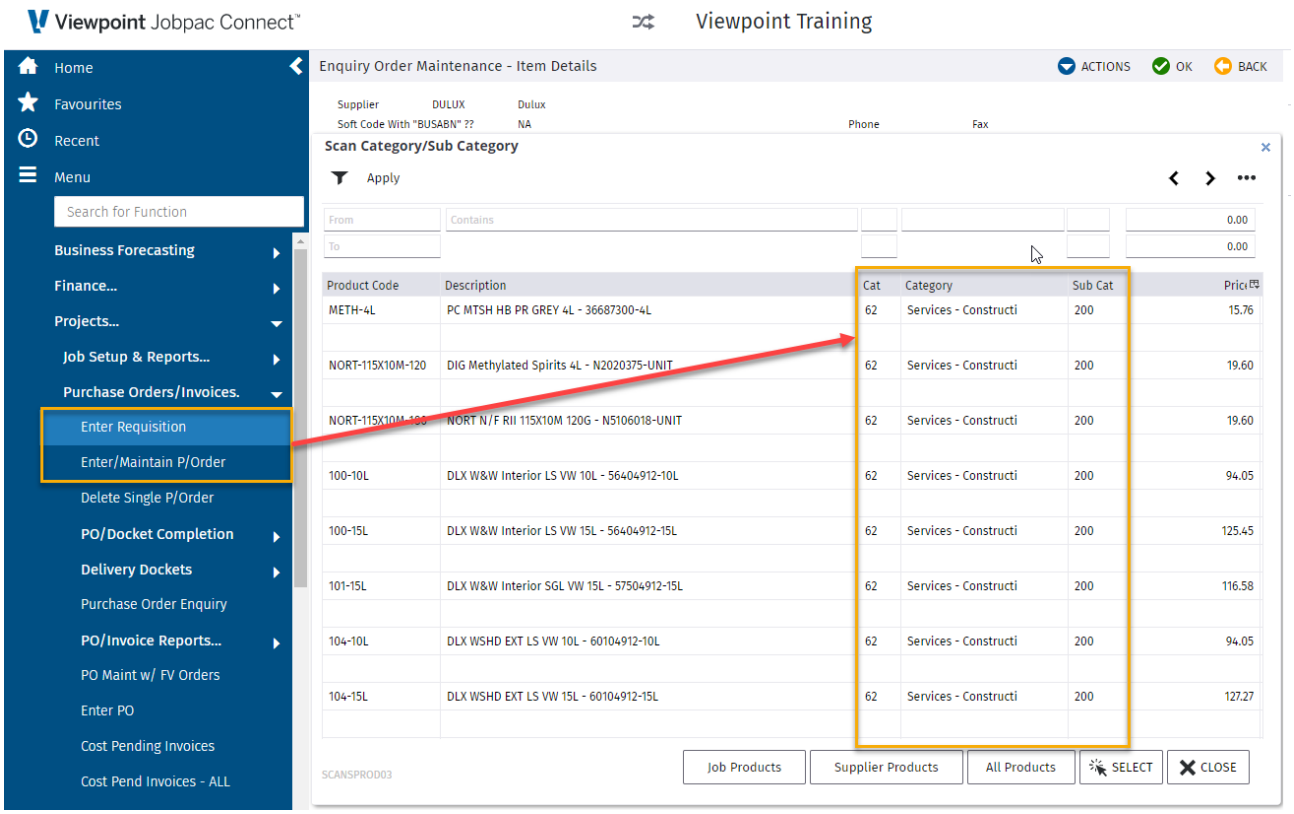


## *New Product Scan in Purchase Order Maintenance*

A new Product Scan can be accessed when adding items in Purchase Order Maintenance that shows and allows filtering of the Category and Subcategory details for a product. 2 rows of description will be displayed for each product in the scan. To activate add the following parameter…

- System parameter PRDSCN/position 1
  - 'C' = Product scan with Category/Subcategory information

*Note: This is a low risk parameter. Activate as desired.




## *Enhancements to Payroll Uploads*

For STP2 data preparation requirements and other load-on or new company configurations we have enhanced the Employee Upload and Payroll Transaction Code Upload to have additional fields. Make sure you download the new templates before you use these uploads the next time.

1. **Additonal fields** have been added to the **Employee** and **Payroll Transaction Codes** uploads as described below:
   - Upload **EMPLOYEES** (Employees) new fields include…
     - Manual Entry
     - Pay Group
     - Location
     - Tax Scale
     - Employment Basis
     - Income Type
     - Country Code
     - ESCT Transaction Code
     - ESCT Rate

- Employee Pay Cycle
- Kiwisaver Status
- Kiwisaver Eligibility

- Upload **PAYTRANCOD** (Payroll Transaction Code) new fields include…
  - Oncost % 01
  - Oncost % 02
  - Oncost % 03
  - Oncost % 04
  - Oncost % 05
  - Oncost % 06
  - Oncost % 07
  - Oncost % 08
  - Oncost % 09
  - Oncost % 10
  - Oncost % 11
  - Oncost % 12
  - Oncost % 13
  - Oncost % 14
  - Oncost % 15
  - Oncost % 16
  - Oncost % 17
  - Oncost % 18
  - Oncost % 19
  - Oncost % 20
  - STP2 Leave Code
  - STP2 Allowance Code

2. We have also enabled **updates to existing employees** via the EMPLOYEE upload. Previoulsy only new employees could be uploaded. To enable this feature please activate the following parameter.

- EMPUPL/position 1
  - 'Y' = Allow updates to existing employees

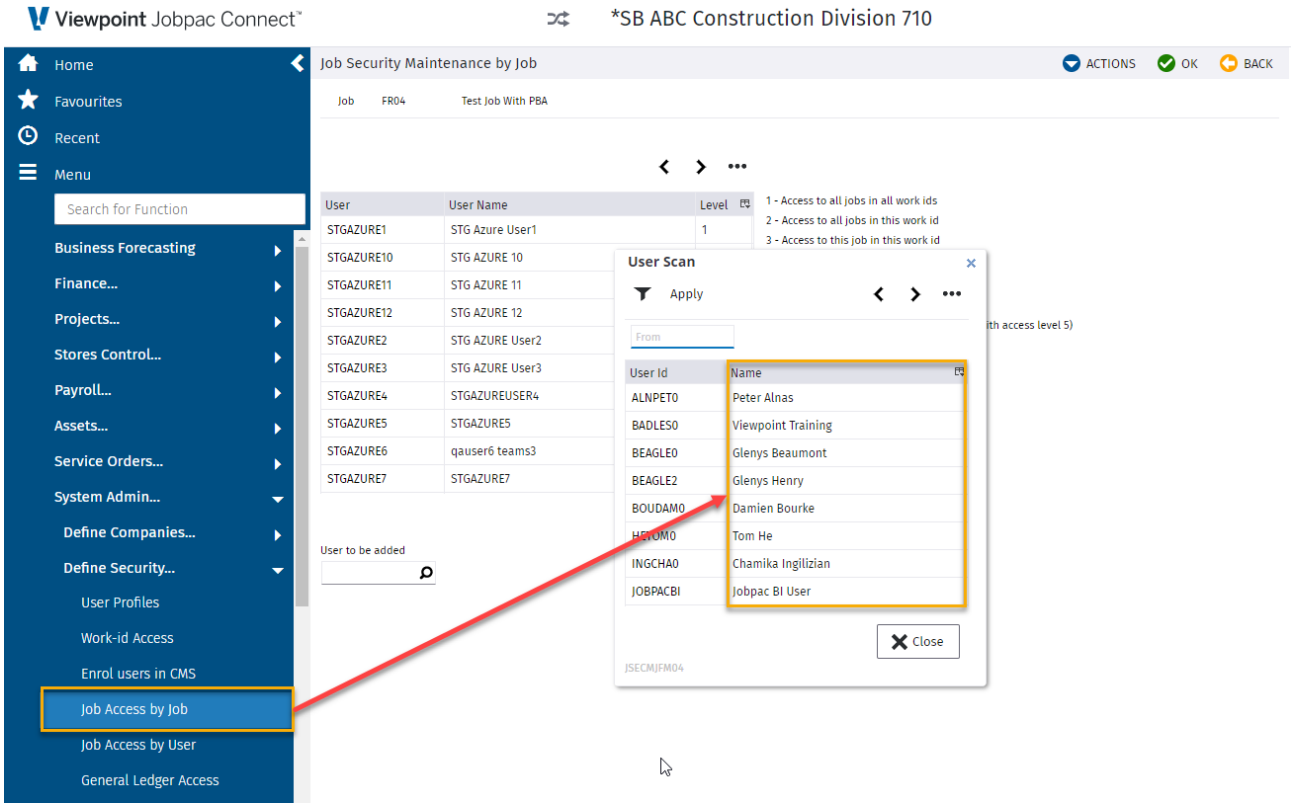
* Please download the updated templates before using these uploads.
** As these uploads relate to Payroll we highly advise that you test the uploads suit your needs in a test environment before use in a live environment.
*** This new parameter is classified as a high risk parameter as all employees and payroll can be impacted if used incorrectly. Please test in your Test environment and contact a Jobpac Consultant should you need any assistance.

## Suggestion Box & Other Enhancements

- ***Add Bank Name to the Daily List of EFT Report***
  Add the 'Bank Name' column after the (Bank) 'Account' column in the EFT List Report.

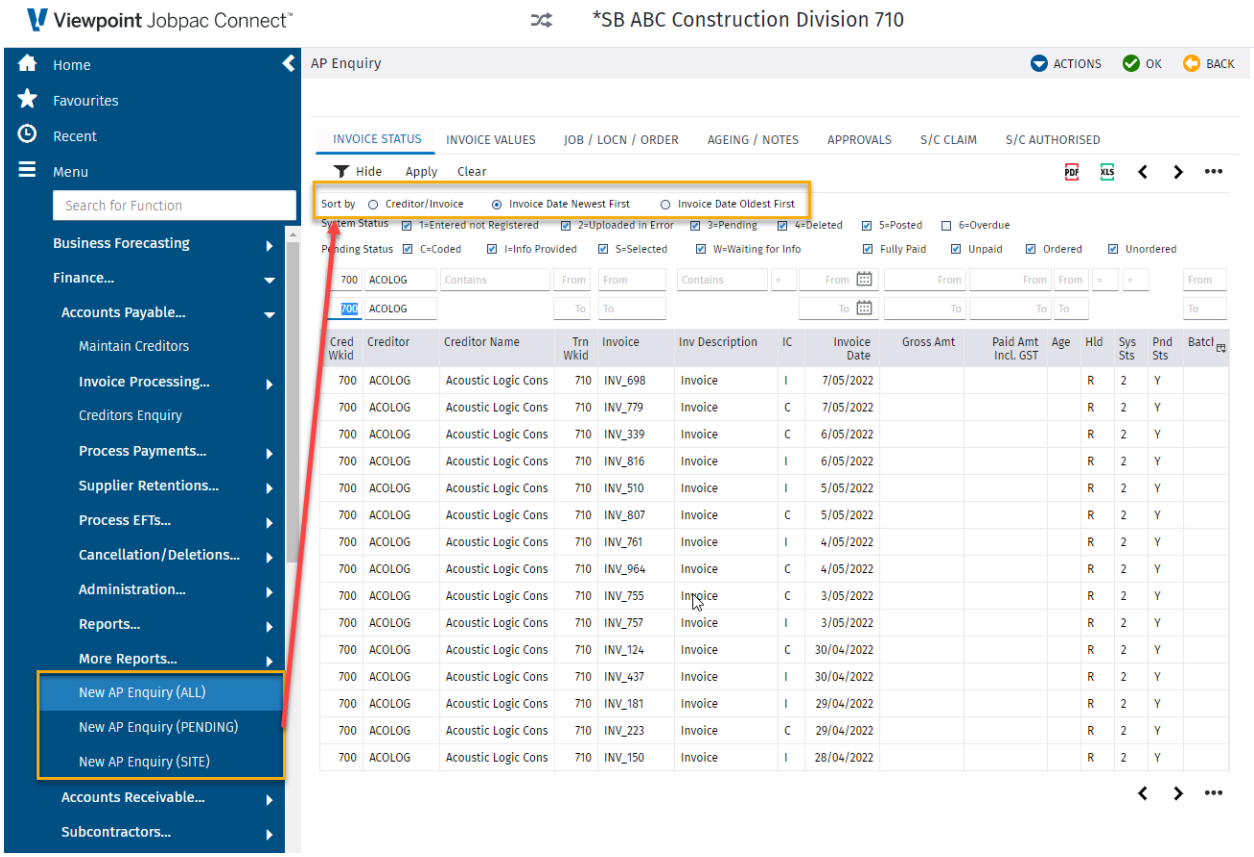
- ***Add Contracts Manager to the JobListing API***
  JobListing API has been enhanced to now return the ContractsManager.

- ***Add User Name in the User Scan in Job Security by Job.***
  The User Name has been included in the User Scan in Job Security by Job. This will assist the user when setting up security for a job.



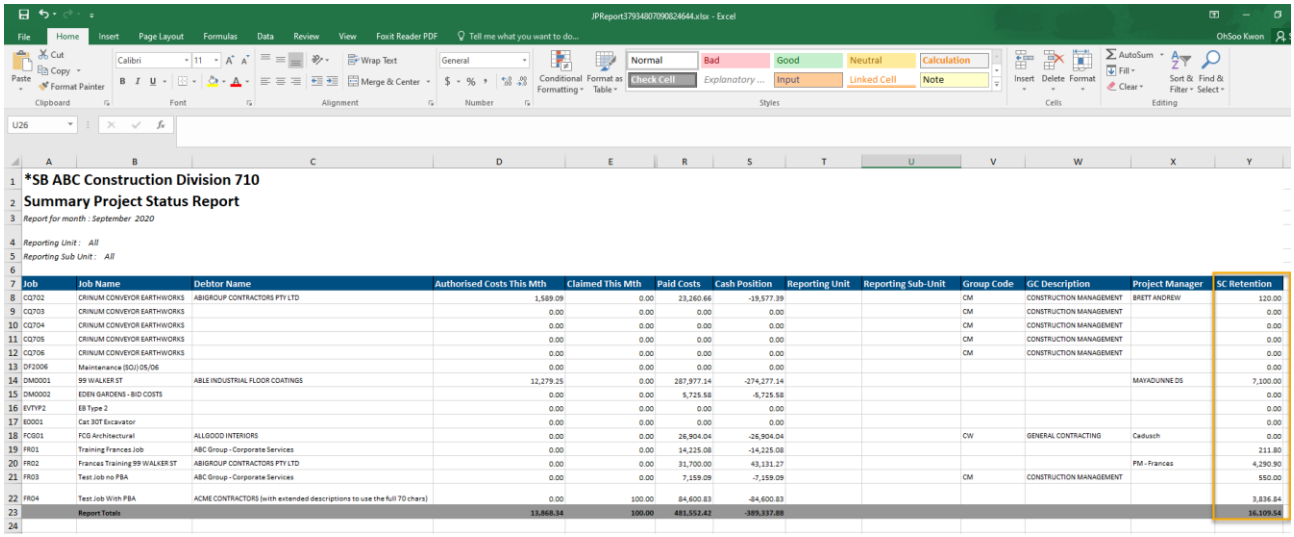

- ***Rejection Text in AP Invoice Approvals***
  Rejection text will now be included in the body of the rejection email for AP Invoice Approvals. This was the last area of Jobpac that did not include this logic on rejections.

- ***Newest to Oldest Sorting Ability in the New AP Enquiry***
  New sorting sequences are available in the New AP Enquiry as shown below…
  1. **Creditor/Invoice** (sorted by creditor then by invoice number))
     - This is the default sort when viewing all invoices for all creditors.
  2. **Invoice Date Newest First** (sorted by the invoice date in descending order)
     - Default when viewing invoices for a creditor to show the newest invoices for a creditor.
  3. **Invoice Date Oldest First** (sorted by the invoice date in ascending order)




- ***Add Subcontract Retention Column to the Summary Project Status Report***

Subcontract Retentions totalled to Job level has now been added to the Summary Project Status Report in the last column.

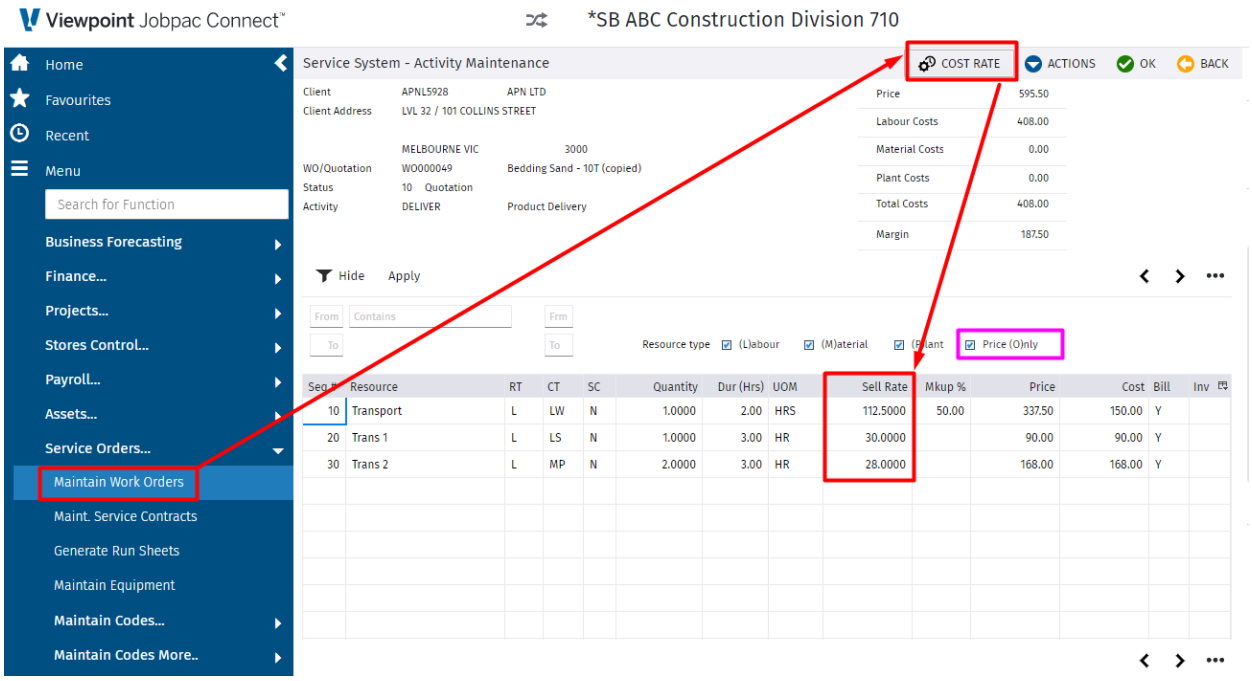



- ***Work Order Enhancements***

Work Order Activity Resource Maintenance has been upgraded to include a new Resource type called “Price Only” and also we have added a “Sell Rate” view and Edit.

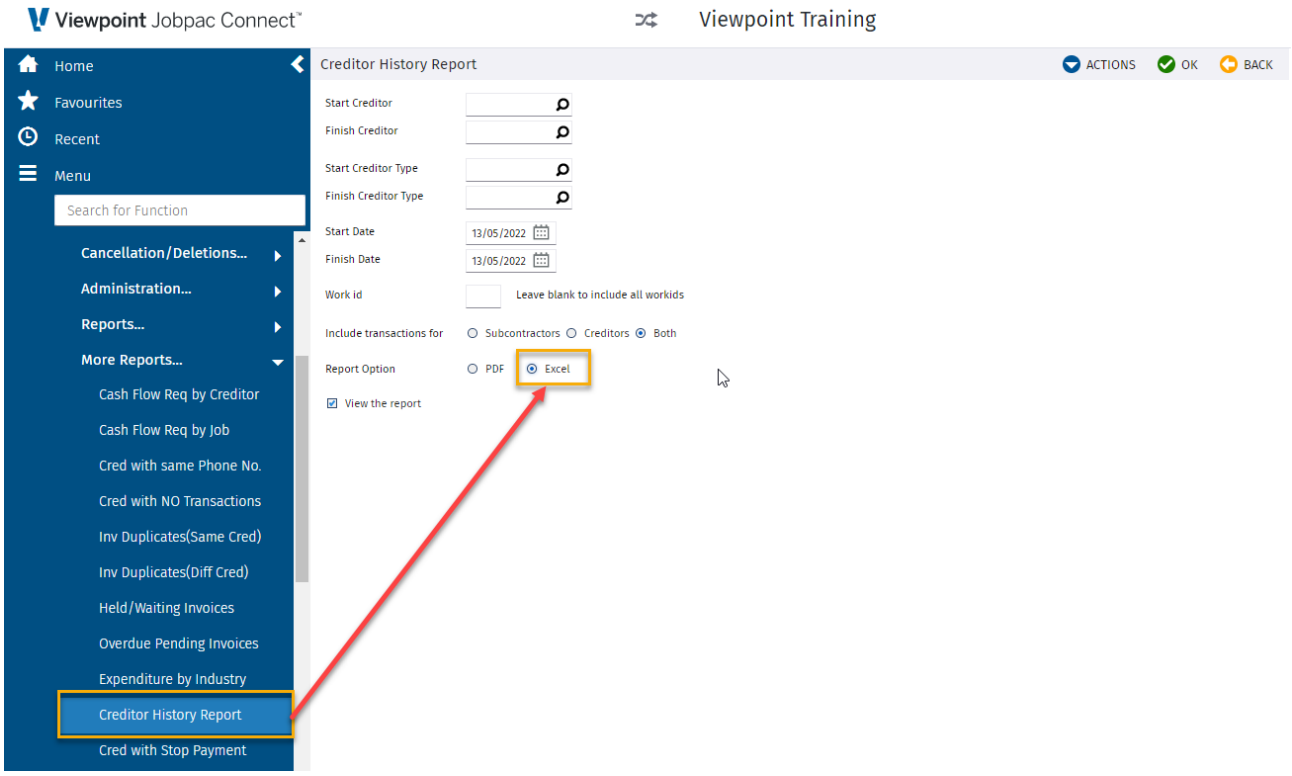
- The new “Price Only” Resource Type allows you to have a Price for an item with no cost.

- The "Sell Rate" View, accessed by the Action Option or the one-click productivity Icon, allows you to define or view the **Sell Rate** for the item to calculate Price. Cost will be preserved and Cost Markup % will be back calculated




- ***Excel Output for Creditor History Report with Totals***

Excel output option is now available for the Creditor History Report, including creditor totals.



# Fixes

## Module – Accounts Payable

- [Fix] In the New AP Enquiry the invoice is paid but on one of the other tabs the date is still in blue indicating a Due Date and not a Paid Date.
  - Issue# 107506
- [Fix] Standard AP Enquiry screen does not show the correct tax code for Pending Invoices that have been dissected to multiple tax codes.
  - Issue# 107616
- [Fix] When running the Payment Times Reporting, selecting Actions -> Refresh populates the correct reporting dates but automatically changes all working entities
  - Issue# 107833
- [Fix] AP - Einvoice edit screen has incorrect red highlight against fields that are not in error.
  - Issue# 107834
- [Fix] Next Approver in the new AP Enquiry is not showing the correct user/approver.
  - Issue# 107904

## Module – Accounts Receivable

- [Fix] Filters selections are not working correctly in the 'AR Print Invoices'.
  - Issue# 107575
- [Fix] AR Sundry Invoice upload is rejecting invoices with incorrect job security errors.
  - Issue# 107696
- [Fix] Unable to page down to the other accounts in AR Cash Entry.
  - Issue# 107711
- [Fix] AR Sundry Invoice print does not work and does not produce the JOM form.
  - Issue# 107949

## Module – Business Intelligence (BI)

- [Fix] Unable to access BI Analytics via Jobpac.
  - Issue# 107682

## Module – Fixed Assets

- [Fix] In Assets EOM, Cost billing is not picking up the monthly finance lease amount as part of the monthly cost.
  - Issue# 107520

## Module – General Ledger

- [Fix] When the Cost Type is changed for an asset-based GL Journal Entry, the GL Account does not update automatically.
  - Issue# 107048
- [Fix] Session hangs when running the Bank Reconciliation Report.
  - Issue# 107958

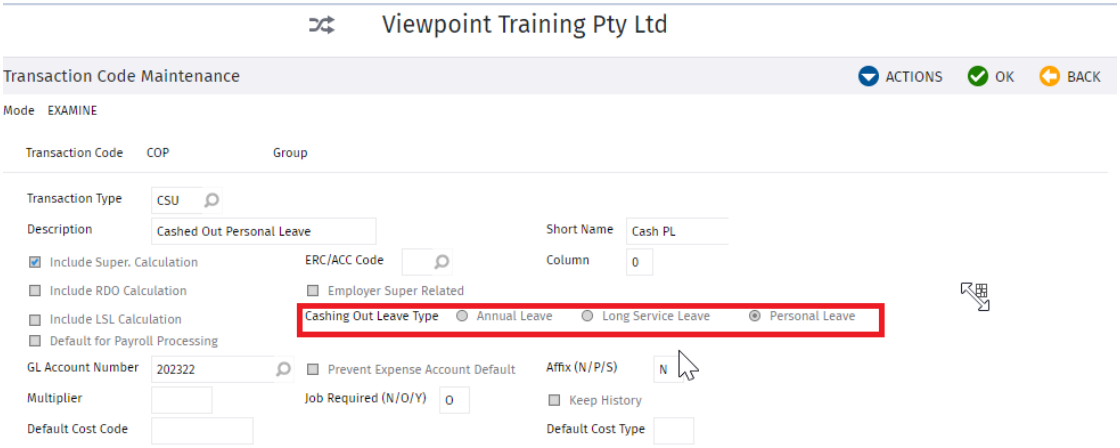
## Module – Job Costing

- [Fix] Job Enquiry does not position it to the correct job as per Jobpac standard on previous accessed job.
  - Issue# 107379

## Module – Payroll

- [Fix] Casual Loading - Job loading is combined and allocated to the payroll GL instead of allocating to the relevant jobs.
  - Issue# 106913

- [Fix] Protection allowance is being added for all salary employees when approving imported timesheets in ETS EBA. This should only be happening for waged employees.
    - Issue# 107021
- [Fix] Cashing out AL, PL, LSL.
    - The existing system parameter PYCHUP is still being for cashed out annual leave.
    - A new parameter has been added for cashing out PL and LSL. The parameter is PYCUPL.
        - First Position must be 'Y' to allow cashing out LSL
        - Second Position must be 'Y' to allow cashing out Personal Leave. If it is Y, then you have to nominate the minimum balance of personal leave after cash out.
    - When you set up the cashed out transaction code, you must select the cash out leave type.




    - Issue# 107298
- [Fix] NZ Payroll Cash Up - Hours was returned to employee after EOFY roll over.
    - Issue# 107736
- [Fix] Casual Loading Super calculation is incorrect - the super portion of the leave is not calculated at all.
    - Issue# 107823
- [Fix] Casual Loading Description is incorrect in the payroll processing.
    - Issue# 107824

## Module – Progress Claims

- [Fix] Deleted jobs are allowed to be accessed in the Progress Claim module.
    - Issue# 107843
- [Fix] HC Progress Claims cannot be reprinted with correct historical retention values or net claim values.
    - Issue# 107859

## Module – Purchase Orders

- [Fix] Completing a PO item in a work id also completes other PO items for that PO for other Jobs.
    - Issue# 107684

## Module – System Administration

- [Fix] Incorrect/unknown user appears in the System Audit Report for AR Cash Receipts.
    - Issue# 107123

## Module – Variations

- [Fix] Variation Price Submission report ignores blank line/s from what is entered. A new system parameter will now allow blank lines to flow through to the JOM form.
    - System parameter VPSUBM/position 6
        - 'Y' = Include blank lines in the JOM form

    - Issue# 107046
- [Fix] When adding a new variation item in the Variation Register, instead of adding a new one it updates/overwrites the existing variation item.
    - Issue# 107552
- [Fix] The Download from the Variation Enquiry is excluding variations with status 'W' - Waiting for Approval.
    - Issue# 107902

## Module – Web Services

- [Fix] CreateANewAccountsPayableTransaction is not correctly passing TransactionDate or PaymentDueDate.
  TransactionDate is going in as today's date (ignoring what is passed in the call) and Due Date is calculated from payment terms (ignoring what is passed in the call).
    - Internal Issue
- [Fix] UnpaidInvoiceListing is not returning the expected invoices when using centralised creditors.
    - Internal Issue
- [Fix] Invoices from OCR not coming through to Jobpac.
    - Issue# 107572
- [Fix]
  1. Rate is being set to the wrong value through the UpdateAPOItem API.
  2. Project cost code and cost type not updating through the UpdateAPurchaseOrderItem API.
    - Issue# 107645

## Module – WUI/GUI

- [Fix] (WUI) Other Payment column is not editable in Cash Account Maintenance.
    - Issue# 107625