 **Viewpoint**  
Jobpac Connect<sup>™</sup>

Energy Capture  
Function Guide  
Version: 1.0

# Document Control Table

<b>Prepared by</b>	Damien Bourke
<b>Approved or authorised by</b>	
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# Change History

Version	Date	Author	Description of Changes
1.0	31/03/2022	DMB	Initial Release

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## Overview of Energy Use Capture in Jobpac

Jobpac has a facility by which the quantity of energy materials, e.g. fuel, oil, supplied to projects can be captured in the system via the Invoice registration process, and the subcontract payment process. As invoices are registered in Jobpac, or when subcontract claims are processed, the quantum of energy supply can be captured at the same time.

A table can be setup in the system which defines the types of energy where it is necessary to capture the volumes of that type of energy. Suppliers and subcontractors can be tagged in creditor maintenance with the types of energy they supply. Automatic prompts will then be provided to data entry staff at the time of invoice registration, and subcontract payments to enter the quantities of energy supplied.

Energy quantities can be entered at that time directly from the invoice detail or the subcontractor claims, or the invoice or payment can be marked for later capture of this data.

All transactions tagged with energy use are written to a separate file. Data from this file can be downloaded to a spreadsheet, and then used to prepare appropriate reports for various authorities.

## Configuration of Energy Capture Function

### Parameters

The parameter EGYCAP is used to turn this function on.

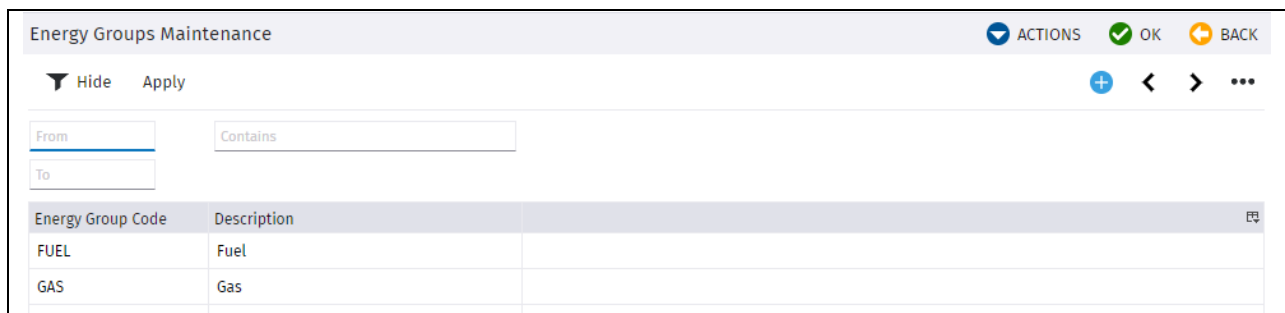
EGYCAP	Energy Capture
Pos 1	Set to Y to turn function on
Pos 2	Set to Y skip the energy entry screen in invoice registration, and tag the transaction as EL (i.e. Enter Later)
Pos 3	Set to Y to skip the energy entry screen in subcontract payment and tag the payment as EL.
Pos 4	Set to Y to skip the energy entry screen in subcontract payment. (Don't tag transaction at all)
Pos 5	Set to Y to disable the amount (value) entry field in subcontract payments. Only quantities can be entered. (Does not affect invoice registration entry screen).
Pos 6	Set to Y to force entry of energy quantities at both invoice registration and subcontract payments. i.e. cannot enter later.

### Energy Capture Setup

#### Energy Groups Maintenance

To access **Select >Finance>Energy Use>Energy Groups Maintenance**

Energy Types can be grouped. This table enables the setup of these energy groups. At least one group must be setup, even if energy type grouping is not required.



New Energy Groups can be added by typing in the code followed by a description. Once entered, the code cannot be changed, it must be deleted and re-entered. The description can be changed at any time.

Energy Groups cannot be deleted if they have been used.

There is a copy facility from another workid.

# Energy Capture

## Energy Type Maintenance

To access Select >**Finance>Energy Use>Energy Types Maintenance**

These are the codes that the quantities of energy use are entered against.

Energy Type Code	Description	Unit	Group Code	Description
DIESEL	Diesel	LT	FUEL	Fuel
ELECT	Electricity	KWH	FUEL	Fuel
NATGAS	Natural Gas	KG	GAS	Gas
PETROL	Petrol	LT	FUEL	Fuel
PROP	Propane	KG	GAS	Gas

Once entered, the code cannot be changed, it must be deleted and re-entered. The description, unit of measure, and Group can be changed at any time.

Energy Types cannot be deleted if they have been used.

There is a copy facility from another workid.

## Energy Invoice Status Maintenance

To access Select >**Finance>Energy Use>Invoice Status Maintenance**

These are “Hard Coded” statuses and are mandatory. New options can only be added by a modification to the function. The description of the three statuses’ can be user defined. There is logic built into the function for each of EE, EL, and NA, all of which are mandatory.

There is a copy facility from another workid.

Energy Invoice Sts	Description
EE	Energy Entered
EL	To Be Entered Later
NA	Not applicable

## Assigning Energy Types to Suppliers

To set the energy types up for a supplier use the following path.

Select >**Finance>Accounts Payable>Assign Energy Types to Cr**

Select the creditor and this will display the following screen.

Creditor Energy Types Maintenance ACTIONS OK BACK

This creditor may supply the following energy types CALTEX Caltex Australia Petroleum Pty

Hide Apply + < > ...

From  Contains

To

Energy Type	Description	
DIESEL	Diesel	
PETROL	Petrol	

Enter Energy Types on this screen. Use right mouse button to display Prompt, and use to display available Energy Types.

Any number of Energy Types can be entered.

If this is done, every time an invoice for that supplier is registered, and entry screen for energy use data related to that invoice is displayed. If the supplier is a subcontractor, new subcontract agreements for that subcontractor will be defaulted to record energy use data with the processing of each subcontractor claim.

## Entering Energy Use Data

### Invoice Registration

Invoices are registered in the normal way. If the supplier is tagged to collect energy use data (i.e. Energy types associated with it), then the following screen will display.

Register Invoices 
⌵ ACTIONS ✔ OK ⏪ BACK

Your invoice has been successfully registered.

Creditor	CALTEX	Caltex Australia Petroleum Pty			
Invoice Number	AA-341	Date	18/04/2022	Amount	4,400.00
Nett Amount	4,000.00	Tax Amount		400.00	
Description	Fuels				

**Energy Use Confirmation** ✕

This invoice records energy use

Enter the energy use now

EGYEUSEC001

If the “Enter the energy use now” is unticked and OK selected, then the transaction will be copied to the energy transaction database with the status of EL (Enter later).

If the “Enter the energy use now” is unticked, and the “This Invoice records energy use” is unticked, and OK selected, then the transaction will be copied to the energy transaction database with the status of NA (Not Applicable).

If ticks are not removed and OK selected, then the following screen displays

Energy Use Entry 
⌵ ACTIONS ✔ OK ⏪ BACK

This creditor uses the following energy types **CALTEX** Caltex Australia Petroleum Pty

Job 2180

Transaction AA-341 Trans. Type INVOICE Status (R)released/(H)eld

Energy invoice status **EE** Energy Entered Entry Date Agreement No.

**Hide** Apply ⏪ ⏩ ⋮

Energy Type	Description	Unit	Quantity	Amount
DIESEL	Diesel	LT	2,500.0000	
PETROL	Petrol	LT	1,400.0000	

Enter the appropriate quantities (Amount is optional). When the invoice is registered, it will be copied to energy transaction database, and be available for enquiry.

### Subcontracts

If a subcontractor is setup as providing energy use data, then the setup of a subcontract agreement for that subcontractor will display the option to nominate if this subcontractor must



supply energy use data with this subcontract agreement. See below. If this is left ticked, then energy use data must be entered with the processing of each subcontractor claim.

Subcontract Maintenance ACTIONS OK BACK

Costing Work Id	920	
Job	2180	Large Park
Subcontractor	CALTEX	Caltex Australia Petroleum Pty
Agreement	21809009	Energy Supply

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Agreement Type  Lump Sum  Schedule of Rates

Agreement Payment Terms

Payments for this subcontract agreement to be included in Taxable Payments Reporting

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Subcontract Payment Valuation Method is  Manually  Work Dockets

This Agreement is for a Nominated Subcontractor

This Agreement is Subject to Rise & Fall

This Agreement is Paid Direct By Client

This subcontract must supply Energy Use data with each Progress Claim

When the subcontract payment authority is being prepared, the same screen as for invoices will pop up after the retention screen.

Enter the appropriate quantities (Amount is optional). When the subcontract payment is posted, it will be copied to energy transaction database, and be available for enquiry.



## Reports

All the data collected can be downloaded via the Energy Capture Enquiry. In addition, there is a report that lists all suppliers that are tagged as suppliers of energy data.

To access the Energy capture report Select

**>Finance>Energy Capture>Energy Types Report**