Viewpoint
Jobpac Connect™

User Defined Fields Setup
Function Guide
Version: 1.0

Document Control Table

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Commercial in Confidence	

Change History

Version	Date	Author	Description of Changes
1.0	31/12/2021	DMB	Initial Release

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User Defined Fields

Introduction

User defined fields (UDFs) can be setup for the following in Jobpac

- Projects
- Parent Projects
- Creditors
- Debtors
- Profit Centres
- Unsecured Projects
- Monthly Forecasting (Standard Projects and Child Projects)
- Monthly Forecasting (Parent Projects)

The menu options to create the user defined fields are all in a menu called **User Defined Fields** within the System Administration Menu.

Within the Setup screens, there is an option to upload data into the user defined fields for each of the first six options. This is for uploading Data INTO the fields not setting the user defined fields up.

The screens to enter the data into the user defined fields will exist within each appropriate module of Jobpac. Documentation for the entry of data will appear in the module documentation as described below.

- Projects   Job Setup and Maintenance
- Parent Projects   Job Setup and Maintenance
- Creditors   Accounts Payable
- Debtors   Accounts Receivable
- Profit Centres   General Ledger
- Unsecured Projects   BFM Unsecured Projects
- Monthly Forecasting (standard)   BFM Contract Valuation
- Monthly Forecasting (Parents)   BFM Contract Valuation

Setup of the User Defined Fields

The screens to setup all the user defined fields are accessed from the **User Defined Fields** menu within the System Administration Menu.

The Setup screens for all 8 of these are the same, except for the heading at the top of the screen. Just the setup for Unsecured Project UDFs will be described below.

Select the menu option to setup UDFs, and the following screen is displayed. Only those workids that the user has access to will display.
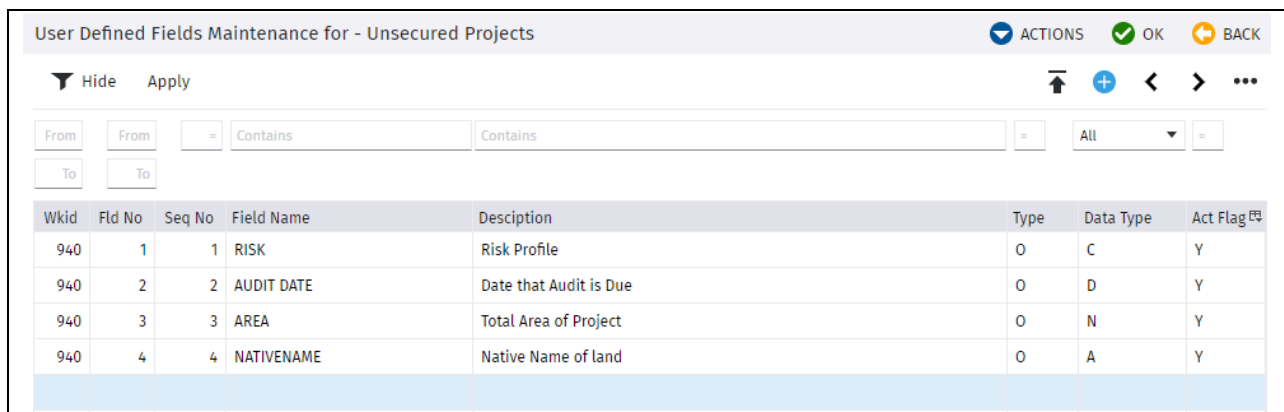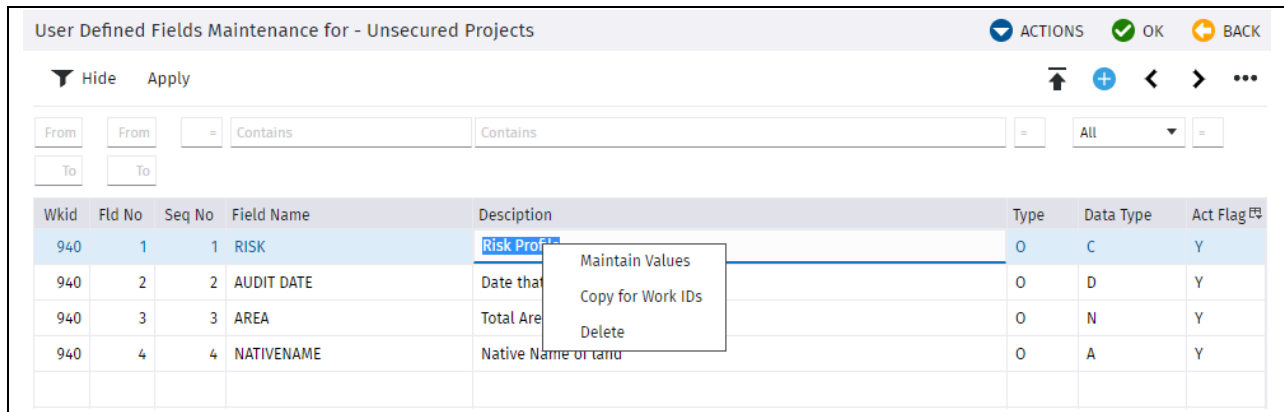

Select Add Field to enter a new UDF, or just change data within the screen for existing UDFs.

Column Name	Description
Workid	Workid where UDF is to be set up
Fld No.	This Field Number is created by the entry program, it will always be one more than the last no for that workid. It is a key field for use in the upload option.
Seq No.	This sequence number is the order the UDF appears on the entry screen for UDF data. It can be changed at any time. It must be unique.
Field Name	This appears as the description of the UDF in the screen where UDF data is entered.
Description	This is a full description of the UDF. It does not appear on any screen, but is available within BI.

Column Name	Description
Type	This is the type of UDF. There are two options O for Optional, and M for Mandatory. If a UDF is mandatory, then no changes can be made to any UDF on the UDF entry screen unless this field has been entered.
Field Type	UDFs can be one of four field types. This determines the type of data that can be entered into a UDF.
	C A code must be selected
	N A numeric amount must be entered, i.e. nothing but numeric figures, no $ signs, no commas. Up to 30 numbers.
	A Any alpha numeric data can be entered up to 30 characters.
	D A date must be entered in the form DDMMYY, or from a GUI calendar lookup.
	There is a lookup of options in the filter.
Act Flag	This determines if the UDF is active or not. Y means active, and N means not active.
	A UDF can be made inactive at any time. If not active, a UDF will not appear on the entry screen for that UDF, unless it has already been used, in which case it will still appear, but cannot be changed.

A number of options are available via the Right Mouse Button.

Option	Description
Maintain Values	This is only available if the Field Type is C. Selecting this option displays a screen where options for the UDF can be entered. These options are then available via a drop down list when entering UDF data. A User must choose an option and cannot enter into this field. Individual options can be made inactive at any time. They will not appear on the drop down list. Options can be deleted if they have not been used to enter any data against.
Copy for Workids.	This can be used to copy a UDF and its Values (if type C) to other workids. A workid selection screen is displayed, and any number of workids can be selected. The rows turn pink when selected. When all required workids are selected, select OK, and then Cancel. The copy will then be performed.
	If a UDF already exists, then the Values (type C only) will be updated, and the following fields will be updated
	Sequence Number

Option	Description
	Field Name
	Description
	Type
	Active Flag.
	The Field type cannot be changed.
	If a Value (Type C only) has been deleted from the UDF copied from this deletion will carry through to other workids selected unless the Value has been used in that workid.
Delete	A UDF can be deleted if it has not been used by any function it applies to, i.e. Project, Creditor, Debtor,

Uploading Data into UDFs

There is an **Upload** option in the Actions Menu, which allows the bulk upload of UDF entries.

Here is a sample upload

Workid Description
Upload of Unsecured Project User Defined Fields

Mandatory	Mandatory	Mandatory	Mandatory C, N, A	Mandatory If Type = C	Mandatory If Type = N or A	Mandatory If Type = D
Workid	Job No	UDF No.	UDF Type	UDF Code Value	UDF Numeric orText Value	UDF Date
001	T00004	1	C	006		
001	T00004	2	N		45000	
007	X00010	1	C	120		
007	X00010	2	D			31/01/2016
007	X00010	3	A		Jim James	