

AccuBuild Version 9403 Release Notes - July 28, 2016

AccuBuild Mobile 3.0 - Enhancement

A new setting configuration setting has been added to the AccuBuild Mobile Settings Screen to control the format of the Equipment Screen on the Daily Reports.

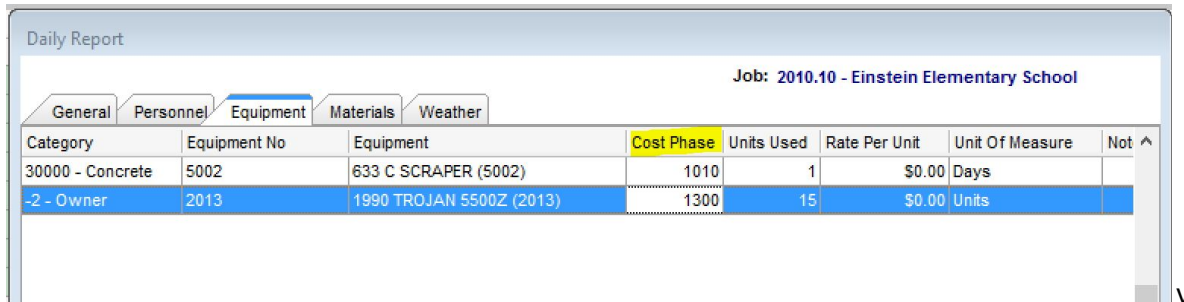
- Screen Format 1 - This is the traditional equipment screen that included the Category, Unit of Measure, and the equipment rate.
- Screen Format 2 - This is an alternate equipment screen that does NOT include the Category, Unit of Measure, and equipment rate fields. The screen DOES include a new job cost phase field.

Mobile Daily Report Settings

Equipment Screen Format: Screen Format 1

Project Management - Daily Report Screen Enhancement

- The Equipment Tab on the Daily Report has been updated to include the job cost phase field. This was necessary in order to be consistent with the new Equipment Screen Format 2 option that has been added to AccuBuild Mobile.



Daily Report

Job: 2010.10 - Einstein Elementary School

General	Personnel	Equipment	Materials	Weather			
Category	Equipment No	Equipment	Cost Phase	Units Used	Rate Per Unit	Unit Of Measure	Not ^
30000 - Concrete	5002	633 C SCRAPER (5002)	1010	1	\$0.00	Days	
-2 - Owner	2013	1990 TROJAN 5500Z (2013)	1300	15	\$0.00	Units	

MAR Report Library Update

- A new MAR Report has been added to the MAR Job Cost Report Library for reporting on Contract Receipts. You will need to set the security for accessing this new report before it will be available on the report screen.
 - JCREP07.527 - Contract Receipts
- A new MAR Report has been added to the MAR Job Cost Report Library for reporting on Change Order Detail items. This report was previously only available under the traditional version.
 - JCREP05E.528 - Change Order Analysis Item List Report
- Two existing reports were updated in the MAR Payroll Reports Menu for the Payroll State Unemployment Reports. These reports were corrected for the grouping by employee.

- PRREP14C.644 - Payroll State Unemployment report by Trans Date
- PRREP14C.645 - Payroll State Unemployment report by W/E Date
- A new report was added to the MAR Client Reports Menu
 - CLREP03D.777 - Profile Status - Excluding Lien Status

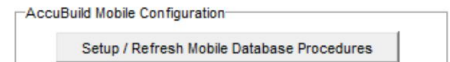
Timecard Worksheet - Enhancement

- The certified payroll flag will now be updated automatically based on the job list setting for certified payroll whenever the job number is changed on a timecard entry.
- The business rules for the traditional time card screen regarding Union Code changes and Department Code changes are now included in the timecard worksheet entry screen:
 - Union Code changes - when the union code is changed, the department code will be updated with the default department code found in the union table if a default code exists. In addition, if a department code change occurs based on the new union code, then comp code will be changed if the new department code has a default comp code.
 - Department Code changes - when the department code is changed, then comp code will be changed if the new department code has a default comp code.

AccuBuild Mobile Settings - Custom Stored Procedure BUG FIX

- The 9402 Release had an issue displaying an error message when the mobile stored procedures were refreshed. This error occurred when there were no custom scripts setup for the company which is really not an error and should NOT have been displayed. Custom scripts are an option for tailored solutions and are NOT a requirement for AccuBuild Stored Procedures. This error message has been corrected.

NOTE: Whenever the *Setup / Refresh Mobile Database Procedures* is executed from the AccuBuild Mobile Settings Screen or automatically after installing an AccuBuild Update, a set of stored procedure logs will be created:



System Stored Procedure Logs: These logs are created in the DATA folder and are created for script class codes 7772000, 7772010, & 7773000

Custom (Tailored) Store Procedure Logs: These logs are created in the COMPANY folder and are created for script class codes 112000 & 113000.

Document Routing / AP Invoice Approval Process - Enhancements

- The Document Routing Screen was updated with a new locking mechanism which will now prevent two users from making AP Entries on the same vendor invoice at the same time. Each time an invoice is

accessed for editing from the routing approval screen, it will be marked as LOCKED until the user closed the invoice entry screen.

- A new pop up menu option has been added to the *Accounts Payable Invoices* menu for clearing a LOCKED routing invoice record. The new menu option is called *Clear LOCK on PO AP Invoice* and can be used in cases where a user session of AccuBuild was ended abnormally and an invoice was left in the LOCKED state. Be sure to use extreme caution to make sure another user is not currently editing the invoice before clearing a lock, as this can cause loss of data and / or duplication of entries.
- The approval settings screen has been updated to enforce the business rules for the maximum size vendor number of 12 characters. Previously, this rule was not enforced and an error would be displayed indicating the field would be truncated.
- The “in Hands of User” will now be updated with the current user name that added a new document for approval when a new document is attached or dropped onto the approval process grid. This will insure that the user can visually see the new document after it is added to the system when the user is not an administrator. Previously, the document was added but then disappeared due to security rules enforced for the user.
- The approval settings screen has been updated to make sure the new “Approved as Noted” setting is maintained whenever the approval settings screen is re-opened on the same invoice.

AccuBuild Mobile 3.0 - Enhancements

- Enhancements were made for the new timecard entries under the Daily Report Advanced Grid entry screen to read and write time card records and associated production unit by detail item records for each individual daily report record. This feature will bind the payroll time and production entries to a single daily report even when there are multiple daily reports on the same day for the same job. This helps to isolate entries to specific daily reports when more than one job supervisor is tracking daily report information on the same project.
- The Daily Report form for MAR that includes jobsite pictures has been updated for to make sure the pictures show up on the PDF copy for the field when the report is triggered from the mobile device.

Timecard Worksheet - Enhancements

- A new setting has been added to the AccuBuild Settings Tab on the AccuBuild Mobile Settings Screen for disabling the Employee Number Sync Rule. When this rule is disabled (checked), the employee number on the timecard worksheet can be changed to a new employee number that does NOT match the original employee number on the Daily Report for that entry.

NOTE: It is strongly recommended that this rule is enforced for “best practices” in project management so that payroll clerks cannot change the employee number on a Daily Report timecard entry - That change should be approved and carried out by a Project Manager or Project Supervisor via the Daily Report Entry Screen.

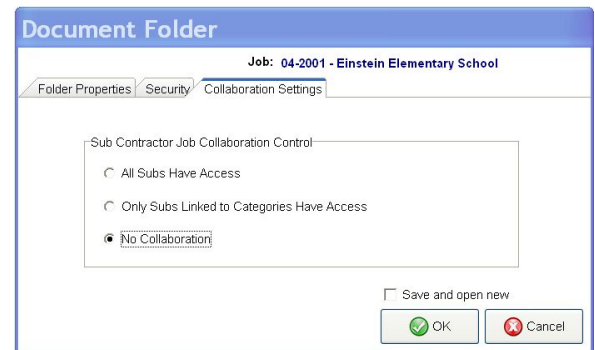
Time Card Worksheet Business Rules

- DISABLE Job Number Sync Rule for Daily Report
- DISABLE Work Date Sync Rule for Daily Report
- DISABLE Employee Number Sync Rule for Daily Report

- The timecard worksheet screen will now enforce a new business rule to NOT allow an employee number to be changed if the timecard was entered via a Daily Report. This will serve as a “best practices” rule to force the person that created the Daily Report to make the change and not the payroll entry person.
- The new business rules for Daily Report Timecards have now been applied to the Clear Button functions so that the employee number and job number cannot be cleared on timecard entries that are linked to a Daily Report.
- If the employee number sync rule is disabled and an employee number is changed on the timecard worksheet for a daily report timecard, the “contractID” field will now be changed to match the new employee number so that the new number is reflected on the Daily Report. In addition, the contactname field (Employee Name field on Daily Report Screen) will be changed to reflect the employee name.
- When the job number is changed in an employee entry, the time card entry will now be updated with the workers comp code and default state code if they exist on the job.

Project Management Log - Enhancement

- The Documents Folder Screen that is launched from the Project Management Log contains a new Collaboration Settings Tab which works in conjunction with the AccuBuild Document Management System to expose documents for collaboration purposes to outside subcontractors. The settings on this new tab define how the documents in the folder are exposed to outside parties via the cloud:



- All Subs have access - This setting opens the documents in the folder to ANY subcontractor that is involved in the related job. Subcontractors are defined as involved when they are included in the category list of the job.
- Only Subs linked to categories have access - This setting is used to limit the folder document to a single subcontractor that is involved on the job. The subcontractor must be included linked to a category on the job category list AND the category MUST be linked to this job folder log. The category setting for the folder is found on the Folders Properties Tab:

Document Folder
Job: 04-2001 - Einstein Elementary School

Folder Properties | Security | Collaboration Settings

General Information

Folder Number	1
Folder Title	
Category	2 - Plumbing
Created Date	6/30/2016
Comments	
Closed	<input type="checkbox"/>

User Defined Fields

OK Cancel

- No Collaboration - This is the default setting and secures all documents in the folder from any subcontractor collaboration sharing.

AccuBuild Analytics - New Product

- A new product is being introduced with this release entitled AccuBuild Analytics. This tool will be used as a reporting tool where the end user can have much more control over filtering and sorting the report data without the need to create custom reports. More information will be available in upcoming release of AccuBuild and the new tool will be launched from the MAR Report menu using the AccuBuild Analytics menu option.

All Reports
Payroll
Payables
Receivables
Job Cost
Ledger
Clients
Orders
Inventory
Project Management
Scheduling
Equipment
Custom Form Assignments
AccuBuild Analytics

Payroll - XML Certified Payroll Report Update

- The "Total" field in the XML file will now reflect the total employee deductions just like the AccuBuild printed report shows. Previously, the California Department of Labor had required that this field be a total of ALL Certified Payroll Accumulators including benefits and pays and withheld payroll taxes.