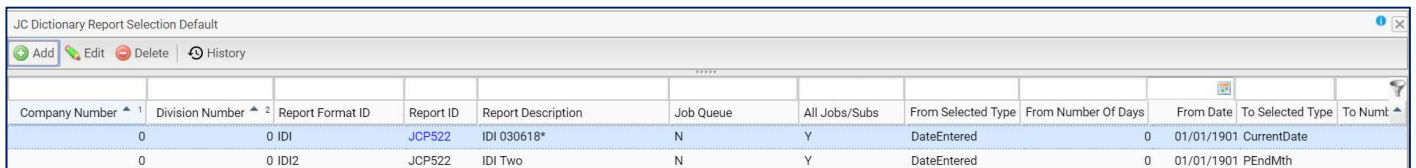


Job Dictionary Setup & Usage Notes for IDI Reporting

Follow these steps to set up the Job Dictionary and schedule it to be run for IDI purposes:

1. Go to Job Cost | Project Reports | Create Job Dictionary Report Definition. See figure 1 below.
2. Click Add.
3. Fill out the Job Dictionary definition screen as follows (see figure 2 below):
 - a. Company/Division – click on the drop down to select a company division, or leave blank to indicate the definition will run for all companies/divisions.
 - b. Report Selection ID – enter one of the following from a hardcoded list of ID’s:
 - i. “IDI” – main job dictionary
 - ii. “IDI2” – alternate job dictionary
 - iii. “USER” – user-specific job dictionary
 - c. Description – enter a description of the job dictionary definition, such as “JTD through CD” (Job to date through current date) to describe the content of the Job Dictionary.
 - d. All Job/Sub – select Yes/No or Range as appropriate.
 - e. Job To Date Process – select “Yes” if the dictionary is to contain data through today. Select “No” if the job dictionary is to contain data through a specific date, such as a month end.
 - f. From Selected Type, To Selected Type, From Number of Days, To Number of Days – each of these parameters are used only if the Job To Date Process parameter above has been set to “No”. If set to “Yes”, let these parameters default. If set “No” select the parameters that best fits the date range calculation you wish to utilize.
 - g. Work file name – provide a name for the job dictionary file that will be created. If this is the main job dictionary, use “IDI”. Else, use “IDI2” or “USER” per 1b above.
 - h. Replace Work file – set this to “Yes”.
 - i. Work file description - provide a description for the job dictionary file that will be created. If this is the main job dictionary, use “IDI”. Else, use “IDI2” or “USER” per 1b above.
 - j. Delete files at signoff – set this to “NO”.
 - k. Display Report Defaults – set this to “NO” unless you wish to change applicable Job Cost defaults for the purpose of creating this job dictionary. If set to “YES” the report ID will display with a hyperlink on the JC Dictionary selection screen. Click on this hyperlink to gain access to the report defaults. See figure 3 below.
 - l. Let all other parameters on the definition screen default.

Figure 1 – JC Dictionary Report Selection screen – click Add to add a new record



Company Number	Division Number	Report Format ID	Report ID	Report Description	Job Queue	All Jobs/Subs	From Selected Type	From Number Of Days	From Date	To Selected Type	To Number of Days
0	0	IDI	JCP522	IDI 030618*	N	Y	DateEntered	0	01/01/1901	CurrentDate	
0	0	IDI2	JCP522	IDI Two	N	Y	DateEntered	0	01/01/1901	PEndMth	

Figure 2 – Job Dictionary Definition Screen

Edit
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Company/Division :	<input type="text"/>	Company Number :	<input type="text" value="0"/>
All Companies :	<input type="text" value="Yes"/>	All Division :	<input type="text" value="Yes"/>
Report Id :	JCP522	Report Selection ID* :	<input type="text" value="IDI"/>
		Description :	JTD through CC
All Job/Sub :	<input type="text" value="Yes"/>	Display Job List :	<input type="text" value="No"/>
From Selected Type :	<input type="text" value="Date Entered"/>	To Selected Type :	<input type="text" value="Current Date"/>
From Date :	<input type="text" value="01/01/1901"/>	To Date :	<input type="text" value="12/31/9999"/>
Time & Material Only :	<input type="text" value="Both"/>	Workfile Name :	<input type="text" value="IDI"/>
Include Closed Jobs :	<input type="text" value="No"/>	Include Income Records :	<input type="text" value="Yes"/>
Consolidate on Reporting Job/Sub :	<input type="text" value="No"/>	Round to Whole Dollars/Hours :	<input type="text"/>
And/Or :	<input type="text" value="Or"/>	Replace Workfile :	<input type="text" value="Yes"/>
Job Type :	<input type="text"/>	Thru :	<input type="text" value="99"/>
Customer :	<input type="text" value="0"/>	Thru :	<input type="text" value="99,999"/>
Engineer :	<input type="text" value="0"/>	Thru :	<input type="text" value="999,999,999"/>
Project Manager :	<input type="text" value="0"/>	Thru :	<input type="text" value="999,999,999"/>
Estimator :	<input type="text" value="0"/>	Thru :	<input type="text" value="999,999,999"/>
Contract Size :	<input type="text" value="-99,999,999,999"/>	Thru :	<input type="text" value="99,999,999,999"/>

Figure 3 – Display Report Defaults

Display Report Defaults: Record Number=183
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Print Cost Type Summary :	<input type="text" value="Yes"/>	Use Summary Code in Cost Type File :	<input type="text" value="No"/>
All Cost Type(s) Y/I/O :	<input type="text" value="Y"/>	Cost Type 1 :	<input type="text"/>
Cost Type 3 :	<input type="text"/>	Cost Type 4 :	<input type="text"/>
Change Order Detail :	<input type="text" value="No"/>	Cost Type 5 :	<input type="text"/>
Consolidate Sub Job(s) :	<input type="text" value="No"/>	Use Alternate Cost Distribution :	<input type="text" value="No"/>
Projected Cost Type 1 :	<input type="text" value="L"/> Labor	Alternate Cost Distribution :	<input type="text" value="1"/>
Projected Cost Type 3 :	<input type="text" value="O"/> Other	Projected Cost Type 2 :	<input type="text" value="E"/> EQUIPMENT
Projected Cost Type 5 :	<input type="text"/>	Projected Cost Type 4 :	<input type="text"/>
Projected Cost Type 7 :	<input type="text"/>	Projected Cost Type 6 :	<input type="text"/>
Projected Cost Type 9 :	<input type="text"/>	Projected Cost Type 8 :	<input type="text"/>
Include Unprocessed Payroll :	<input type="text" value="Yes"/>	Projected Cost Type 10 :	<input type="text"/>
Use Reported Est to Complete :	<input type="text" value="Yes"/>	Lowest % Complete to Project :	<input type="text" value="0"/>
Process as if Closed :	<input type="text" value="No"/>	Include Unprocessed Equipment :	<input type="text" value="Yes"/>
Double Space :	<input type="text" value="No"/>	Include on Order Amt-Cmtd Cost :	<input type="text" value="No"/>
		Payroll at Actual Pay :	<input type="text" value="No"/>
		Use as Bid Budget :	<input type="text" value="No"/>
		Report Total Committed :	<input type="text" value="No"/>
		Print Selection Options :	<input type="text" value="No"/>

4. Go to Admin | Application Installation | eCMS Connect Setup to setup the job dictionary to run automatically on a schedule.
5. Click on Setup Groups. See Figure 4 below.
6. Select "Create New Group" in the Group Name drop down list.
7. On the Setup Group Edit screen, provide a Group Name, such as "JC Dictionary IDI" to match the naming convention in 3b above. Next select "eCMS" in the Portfolio Name field, "Job Cost Dictionary" in the Available Services field, select your job cost dictionary definition as defined in 3c above, select a user ID to run the job dictionary under, and an email recipient to receive diagnostic notices as the job dictionary is run.
8. Click Exit to exit Setup Groups.

Figure 4 – Click on Setup Groups Button.

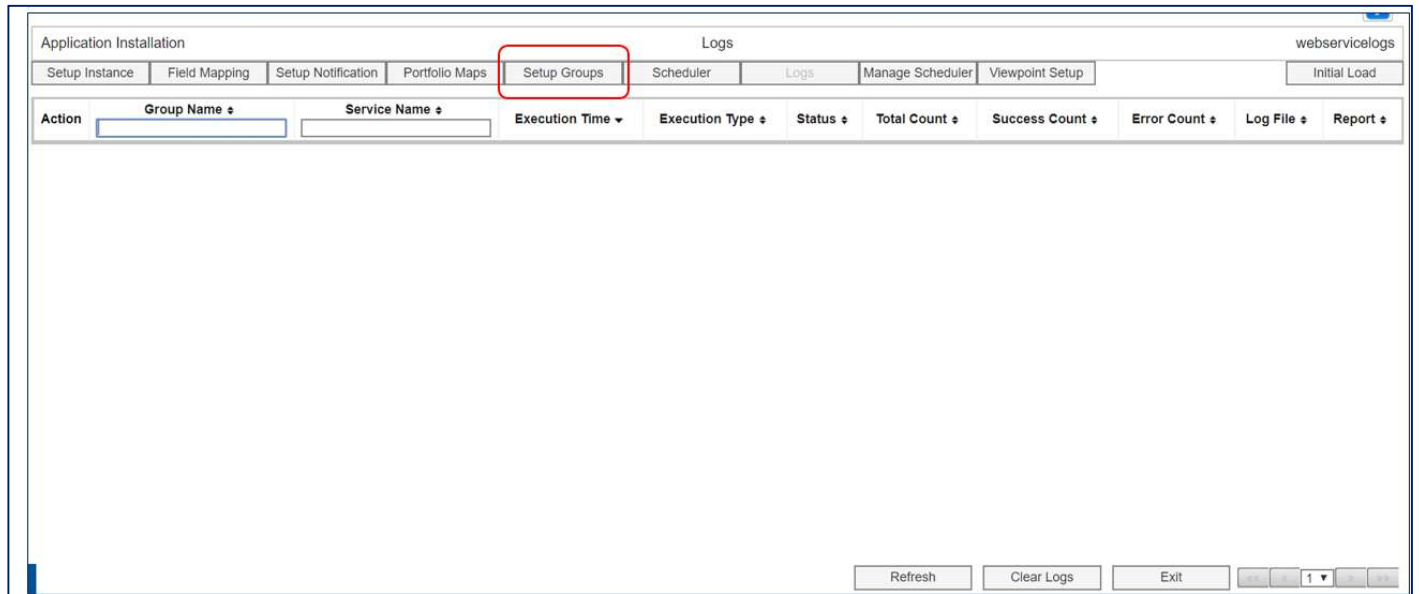


Figure 5 – Click on "Create New Group" in the Group Name drop down list. Fill out other parameters per step 7 above.

Group Name	<input type="text" value="---Create New Group---"/> <input type="text" value="JC Dictionary IDI"/>
Portfolio Name	<input type="text" value="eCMS"/>
Available Services	<input type="text" value="Job Cost Dictionary"/>
Report	<input type="text" value="183"/>
Run Report As	<input type="text" value="SGROSS-Steve Gross"/>
Email Recipient(s)	<input type="text" value="sigross@computerguidance.com"/> <small>Define multiple email addresses separated by comma(,) or semicolon(,)</small>

9. Click on Scheduler Button. See Figure 6 below.
10. Click the Add button. The Setup Schedule dialog box appears.
11. Click on the Available Group drop down list and select the Group defined in steps 6 & 7 above. Next select the Recurring Interval. Select Daily to have the Job Dictionary refreshed each day with current cost figures.
12. Next select the single start time. Time is in Military time. See figure 7 below. Note: the “Starts Every N Minutes” parameter is for the Multi Start option, where the job dictionary can be scheduled to be run multiple times per day.
13. Click Active to activate.

Figure 6 – Click on Scheduler Button

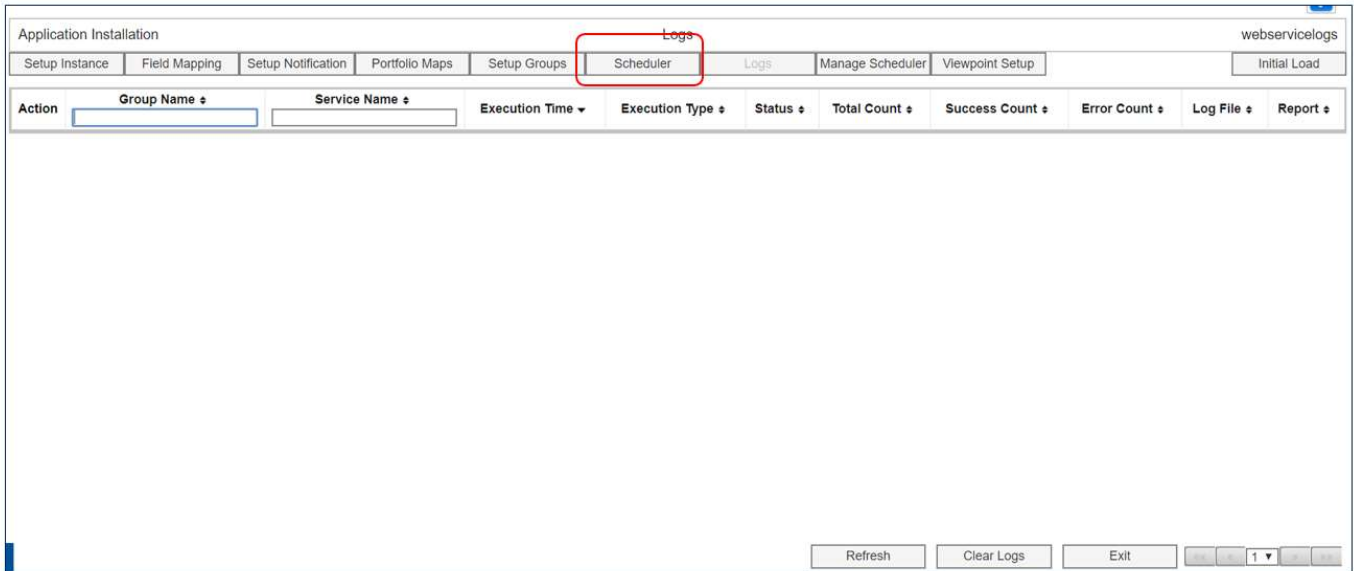
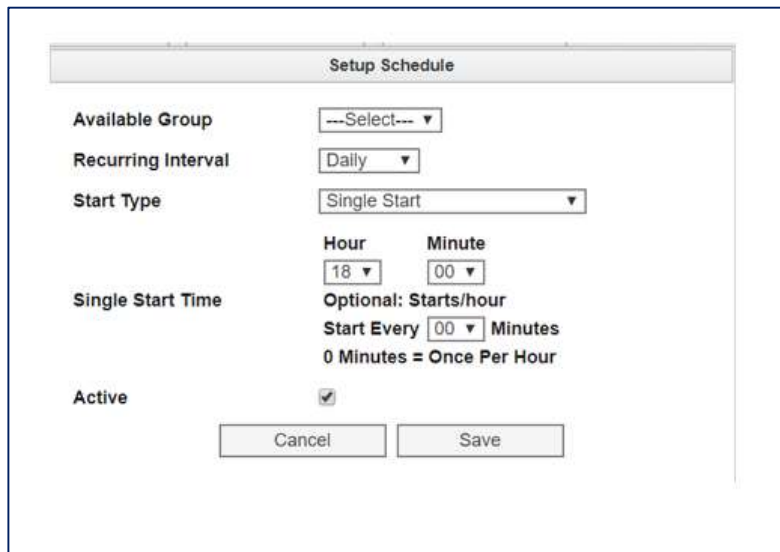


Figure 7 – Setup Schedule Dialog Box. In this example, the job dictionary is scheduled to run daily at 6PM.



14. Final Step: click Manage Scheduler and click the Start button to start the scheduler. The Job Dictionary defined in step 3 above will now automatically be created at the stipulated time each day.

Figure 8 – Manage Scheduler Screen. Status will show running once started.

