

Procurement Change Log

June

Version 20.0601

- Subcontractor requisitions imported from Candy can no longer be edited other than to adjust header section, discount and Vat selection.

May

Version 20.0518

- The Candy subcontractor requisition import process has been updated so that all errors detected on the imported data is checked and any issues identified on screen once rather than line by line as was the previous process.

Version 20.0518

- The GRN by contract split has been corrected.

Version 20.0512

- A new check box has been added to the supplier's master listing screen to exclude Subcontractors from the listing.
- It is now possible to capture a delivery comment per line when capturing a delivery, the note captured will be printed on the GRN report.
- The search function on the ERFQ listing screen can now do a partial search on the reference number field.
- The input field for the stock code on the Orders by selection, Deliveries by selection and Outstanding deliveries report screen has been updated to 20 characters to match the max stock code length.
- The check box to print one contract per page on the GRN listing report has been corrected.

Version 20.0405

- The search function on the delivery address master screen has been fixed.
- An error on the delivered date and captured date filters on the Required vs Delivery Date report have been corrected.
- The layout of the multi-tax drop downs on the requisition edit screen has been updated to confirm to how they used to be displayed in a single row.
- The search function on the Resources by Stock and Product by Supplier reports have been updated to align to the other procurement reports.

April

Version 20.0420

- A conflict in roles that prevented the display of ledger level budgets if the hide Candy rates role had been activated has been resolved.

Version 20.0416

- The excel delivery import process has been updated to correct a missing space in the allocation when capturing balance sheet allocated items. Any historic deliveries impacted by the issue will also be corrected.

Mobi version 20.0416

Please ensure all local clocking data and time sheets have been loaded to payroll before running this update. You must also clear your mobiles cache before logging into the new version. It is important that you are running Accounts version 20.0406 if you are using the Site Attendance function due to new access restrictions.

- The ability to capture a space in the employee number field when adding new employees has been removed to prevent errors when trying to add timesheets for these manually added employees.
- An error when querying the mobi outstanding deliveries has been resolved.

Version 20.0414

- An issue that could result in slow login speeds to procurement if the first login was not done with compatibility set has been resolved.

Version 20.0408

- A copy Contract and Copy Division function has been added to the standard requisition for use when adding multiple catalogue items at once. When clicked the contract or division will be copied to lines of the same allocation where the code is blank.
- The subject line of the new requisition when doing a change order will now populate to reference new requisition number followed by 'a CO on' and the old requisition number to make tracing of the changes easier.

Mobi version 20.0406

Please ensure all local clocking data and time sheets have been loaded to payroll before running this update. You must also clear your mobiles cache before logging into the new version. It is important that you are running Accounts version 20.0406 if you are using the Site Attendance function due to new access restrictions.

- A new restriction has been added to the View site attendance function, whereby the user must be given access to view this from the Accounts > Users screen by ticking the Can See

Site Attendance check box. User without this activated will not be able to access the Site Attendance function.

- An issue that was preventing the login where EID's were not in the drop-down box has been resolved.
- A new Resubmit Site Attendance button has been added to the Clocking screen, this will allow the user to upload attendance clocking directly from the screen, it is visible once a Batch Reference has been inserted into the upload settings screen.

Version 20.0403

- The Z type VAT code will now always display in the requisition drop downs regardless of if it is flagged as input or output, this has been done to address a budget display issue on the plant job cards.

March 2020

Version 20.0330

- A potential error on the catalogue selection screen where multiple attributes have been added and displayed on the master file has been resolved.
- The header on the catalogue and supplier master screens have been updated so that it still displays when scrolling down.

Version 20.0323

- A potential error when trying to view a Subcontractor VO displaying an error on the put zero function has been resolved.
- An onscreen warning that display the incorrect allowable calculation when purchasing a Candy item in a foreign currency has been addressed.

Version 20.0319

- The option to send the approver an email from the requisition listing screens when using workflows has been added.
- A potential security vulnerability has been addressed.

Version 20.0312

- On both the Subcontractor requisition the ledger code on the requisition will be locked from the second line onwards. This has been done because the Subcontractor reconciliation only posted to the first ledger code set from the requisition but users were mistaken thinking the ledger code set on the subsequent lines were being used for the costing.
- The ledger code on the Subcontractor VO's will be automatically locked and be set to the ledger code from the linked reconciliation. This has been done because the reconciliation posting to only a single ledger code.

- A potential invoice reconciliation error when Candy items were purchased to a store and the candy ledger code had been locked has been addressed to prevent the issue re-occurring.
- Multiple catalogue items can now be selected from the catalogue pick list at once.

Version 20.0304

- The filter selections on the PO listing screen have been updated to more effectively recall them when moving between screens.

February 2020

Version 20.0226

- The ability to resize the instructions field has been added back.

Version 20.0217

- A new button has been added to the Candy resource pick list, to add and close, when selected the pick list will close instead of remaining open in the back ground.
- An issue on the Approval notes that prevented the capture of the note if the cursor was moved has been resolved.

Mobi Version 20.0217

Please ensure that all locally stored mobile clocking data has been sent to the payroll before running this update. In addition users must clear their mobile devices browsing history prior to starting new clocking activities.

- The Mobi login screen now allows the manual capture of the EID to log into.
- The site attendance function now reflects both the clock-in and clock-out time if captured and loaded.
- A new dummy Subcontractor payroll has been added to allow for subcontractor clocking and update to site attendance, note daily hours are not available for subcontractors. Subcontractors loaded will also be deleted when the local data is cleared.
- It is now possible to verify that employee details with payroll when manually Adding team members, any entries not verified will reflect on the site attendance as manually added team member.
- An excel export function has been added to the Clock Cards upload screen, when selected the daily hours will be exported to a local excel file on the mobile device to allow this to be emailed to payroll should the direct upload function from the device not work. On IOS devices this function is only available from Safari, as IOS blocks Chrome from downloading local excel file. On Android this feature has been tested using Chrome. Note this export function will not clear the locally stored data.

- A new Resubmit Attendance button has been added, when selected instead of only updating new clocking all locally stored clocking times will be resent to the Site attendance screen.
- Foremen can now add manual team member to any payroll for local clocking data, note hours generated for these employees will still need to be validated and posted in the payroll before they can be used in a calculation.
- The Plant number, Activity and Contract number fields have been removed from the employee add screen as they were not being used.

Version 20.0211

- The headers sections of the requisition and order listing screen have been updated to prevent a bouncing effect when scrolling through the list.
- A potential error on the resource import screen has been resolved.
- The way in which the multi-tax selection is displayed has been updated so that the various tax types are displayed below each other rather than spanning to the right.
- An issue that prevent the addition of multiple stock items to a requisition when multi tax is activated has been resolved.
- The way in which the store lookup was loaded on the standard requisition edit has been changed to improve loading speeds.

Version 20.0206

- The way in which the Standard requisition listing screen loads has been further optimised.
- An issue on the outstanding deliveries by selection, Product by supplier and Resource by Stock reports created in version 20.0120 have been resolved.
- An issue that prevented the addition of standard items onto Subcontractor requisitions when using multi-tax introduced in version 20.0120 has been resolved.
- The contract dropdown when picking from the Candy pick list and making use of user contract restrictions has been fixed.

January 2020

Version 20.0128

- BuildSmart Procurement has been rewritten so that it can be run both in and out of Internet Explorer compatibility mode. Over the coming weeks similar releases will be made for both the Accounts and Payroll modules.
- A new Crystal web reports engine has been released and enabled in the Procurement module with all existing reports converted to run using the new web based crystal engine. Note in order to successfully make use of this feature please log a help desk call for the Crystal engine to be installed on your server, once installed it can be activated via

the Welcome Image on the Accounts dashboard, all clients who run on DBS should already have this installation done.

- A screen has been added to the reports menu section for 'Purchase Order Emails Send List'. This screen will allow you to track if the Auto PO emails have been successfully sent, and if not allow you to attempt to resend the PO directly from this screen.
- An approval error when doing the final approval on Subcontractor requisitions released in version 20.0120 has been resolved.

Mobi:

- A change has been released on the clock card import function to allow the use of alpha characters in the employee number.

November 2019

Version 19.1119

- Attributes have been added to the Subcontractor and Subcontractor VO requisitions, note these will use the same attributes as are on the Standard requisition.

Version 19.1111

BuildSmart Mobi:

If making use of the Foreman clocking function please ensure all local clock cards have been uploaded to payroll before running this procurement update. Once the update has been run the browsing history on mobile devices used for clocking must be cleared prior to recommencing clocking activities.

- The BuildSmart Mobi stock issue functions have been updated so that a stock items default ledger and activity are used.
- The Upload timesheet function has been updated to allow merging of data into open clock card batches. When a foreman selects the Upload Timesheets option a check will be done to see if there are open batches with the same Site and Batch reference. If open batches are found the new data will be added to the open batch. If no open batch is found a new batches will be created.
- Some formatting changes have been made to the Foreman clocking and timesheet screens to ensure a more consistent look.
- It is now possible to approve Subcontractor VO's via mobi.

Version 19.1104

- A potential error when trying to approve Subcontractor requisitions referring to an invalid column called change user has been resolved.

October 2019

Version 19.1017

- A new organisation parameter has been added to procurement for Add stock items with 0 rate. When activated all stock items added to requisitions will be added with a price of 0.
- It is now possible to link a stock code to a catalogue code on the catalogue master. When a stock item is then added to a requisition a new icon will be displayed next to the stock code, clicking the icon will allow you to link the catalogue which will then populate the supplier part number into the front of the requisition description. This can be used to link internal stock codes to supplier catalogue/OEM codes.
- Tags to insert the supplier name and supplier code have been added to the auto-po email template for both the subject line and body.
- The Purchase order range report has been updated to correct the payment terms being printed.
- The product by supplier selection report has been updated to reflect the organisation name instead of the database name.

Mobi version 19.1009

- The timesheet site reference will now auto-populate based on the user and default contract.
- The upload timesheet button has been renamed.
- The warning when uploading timesheets has been reworded to specifically refer to locally stored data.
- A potential issue where the same foreman number is used has been resolved on the Site attendance screen.

Version 19.1008

- The Candy Forex conversion factor has been updated to allow up to 10 decimals to increase the conversion accuracy.

September 2019

Version 19.0925

- The Candy resource import listing screen and Subcontractor package import listing screen has been updated to reflect the name of the computer from which the upload was sent.

BuildSmart Mobi will also be updated with Procurement version 19.0925 and will have the following enhancements:

Requisition Approvals:

- Approvers will be able to add approval comments when doing approvals, if this is activated on the organisation.
- Attachments added to the requisition can be accessed and viewed from mobi, provided a compatible viewing app is installed on the mobile device, on iOS devices only pdf documents can currently be viewed.
- The short description has been added to the requisition listing on the approvals screen.
- Item instructions, if captured, can be viewed from the approval listing screen by clicking on the info icon on the item description line.

Mobi clocking:

Note if you are using the Mobi clocking features a payroll update will also be required.

- An issue that could cause edited clock times not to be saved has been resolved.
- Upload confirmation dialogs have been added.
- The work done and benefit hours function for Australia via mobi has been released.
- An unexplained hang when using iOS on time sheets has been resolved.
- A portrait horizontal scroll and focus on edit feature has been added to the time sheets to assist Android users where the keyboard took over the majority of the screen in landscape mode.
- A site attendance function has been added. This is populated by the new Update Site Attendance button from the upload to server screen, when processed site strength (based on a foremans allocated team) and attendance (based on clock in times) can be seen at either at site or foreman level.

Version 19.0919

- The procurement admin menu has been updated to remove some of the items that were hard coded to be auto assigned and that could not be removed via the admin roles.

Version 19.0911

- The alignment on the quantity column on the purchase order has been adjusted slightly to prevent it being distorted by the vertical line that separates the columns.
- A potential error warning about not being able to drop temp tables has been resolved.
- The ERFQ service has been updated.

August 2019

Version 19.0828

- The Auto-PO Email functionality has been added to the Subcontractor and Subcontractor VO approval process.
- A cancel button has been added to the Auto-PO email screen, when clicked it will cancel the sending of the PO via email and return the user to the requisition listing screen.

Version 19.0820

- The excel delivery import screen has been updated to reflect a loading image while the import is being processed.

Version 19.0802

- The approval history on a requisitions will now show the details as to who has cancelled a requisition.
- It is now possible to use the Show inactive check box when searching for a supplier on a standard requisition, the results will display inactive creditors, but these will not be saved to the requisition when selected.
- Instances where cancelled was spelt as canceled have been corrected.

July 2019

Version 19.0722

- The approval history on a requisitions will now show the details as to who has cancelled a requisition.
- It is now possible to use the Show inactive check box when searching for a supplier on a standard requisition, the results will display inactive creditors, but these will not be saved to the requisition when selected.
- Instances where cancelled was spelt as canceled have been corrected.

Version 19.0716

- Changes have been made to the auto PO email function to allow for the use of email settings that do make use of SSL and User account verification.
- Changes have been made to the auto PO email function to allow for the use of separate report server settings.

Version 19.0708

- Additional alternate report server settings have been added to the background tables.
- The way in which the newsfeed is displayed has been updated to so that it will also display in HTTPS environments.

Version 19.0702

- A new feature has been added to the Mobi Clocking function to allow the allocation of a single shift per day to the employees clock cards in payroll. Note this function requires an update of both the Procurement and Payroll system, and is activated on the Foreman setup screen.

- The capture of special characters when manually adding employees in the Mobi Clocking feature has been blocked to prevent not being able to update the clock cards to the server.

Version 19.0701

- The Reconciled deliveries invoice numbers report has been updated to include the delivery note number.

June 2019

Version 19.0620

- A new function on the Mobi platform has been released that allows the capture of Requisition based Plant returns via mobile devices has been released, a user guide for this function will be released shortly. Note both Accounts and Procurement must be updated to use this new function.

Version 19.0611

- The Subcontractor search screen when creating a Subcontractors requisition has been updated to include a check box to also display for inactive subcontractor records.

Version 19.0603

- The count of requisitions awaiting approval that is displayed on the procurement home screen has been corrected if using workflow approvals.
- The supplier payment terms have been added to the Order Listing report.
- A new user out of office icon (a plane) has been added to the top of the screen. If a user clicks the icon they will be automatically marked as out of office for all workflow approvals which will be redirected to their substitutes. Once clicked the user will be automatically logged out of the system. The next time the user logs in their out of office status will be reset and approvals will be redirected back to them. Note this out of office function works in both accounts and procurement so the user only needs to click the icon once.
- The standard purchase order layout format has been updated so that the duplicated header boxes for the subject, description, creditor details, order creation details, requisition notes and contracts are only populated on the first page of the order.
- The way in which the newsfeed in procurement loads has been changed to prevent system lockup if the newsfeed server is off line.
- A new report config option has been added to the Order report configuration in accounts that will allow you to restrict the printed approvers to show only the last monetary approver.
- old po renamed with _1905 (Not in news feed).

May 2019

Version 19.0521

- A new report configuration option has been added to the purchase order to display the settlement discount on the purchase order.
- The supplier's master name has been extended to 127 characters.
- The user role name has been extended to 50 characters.
- The menu item descriptions for Subcontractor CO has been changed to Sub Contractor VO to more accurately describe the menu function which is used to record variation orders not change orders.

Version 19.0508

- The currency information on the Subcontractor requisition and order page has been updated to match that shown on the Standard requisition and order screens.
- A province and category filter has been added to the supplier search function on the Subcontractor requisition screen.
- The country drop down when creating new suppliers is now set to please select.
- The Candy cost rates when importing resources from Candy are now also converted by the candy forex rate if populated.
- A script error when trying to process a change order using the quick PO edit function has been resolved.

April 2019

Version 19.0430

- A new Copy to Blanks icon has been added to the Supplier and Delivery Address lines, if a line is populated and this icon is ticked all of the blank Suppliers or Delivery addresses on the requisition will be set to the same value as the populated one.
- A new automated Purchase Order email functionality is available if making use of Workflow approvals. Please refer to document 1.9 Purchase Order Auto Email in the Procurement documentation to see how this new feature is configured.
- A new Candy buy rate has been introduced into the system, when activated the price control when purchasing from the Candy pick list can be set to a rate other than the final estimated rate to account for longer term contracts price increases. This is configured via the Procurement Administration section where a new menu role has been added for Edit Buy Rate. The buy rate can be set to either the Candy Cost rate or any other rate set by the user. Note updating the buy rate will not affect the overall allowable which will still be calculated based on the original Candy final rate.
- A new report configuration option has been added to the Purchase Order and Requisition that will display the amount in words, this must be configured in Account via the report Config menu item.

- A new report configuration has been added for purchase orders to reflect that they have been Amended in front of the order number, this must be configured via Accounts using the Report Config menu item.
- New report language files have been added to allow the Vat registration, Company registration and Business Registration descriptions to be changed on the Purchase order and Requisition reports.
- The Requisition has been updated to now reflect the Subcontractors VAT number, previously this field was not reflected on the report.

Version 19.0429

- A syntax error when importing deliveries via excel has been fixed.

Version 19.0411

- A formula error when trying to print a purchase order has been resolved.
- The Candy allowable data displayed on the subcontractor requisition screens has been aligned to what is displayed for standard requisitions.
- The home currency rate field when purchasing in a foreign currency against a Candy resource has been locked, this figure will convert from the foreign currency based on the exchange rate on the requisition header.
- The excel requisition import process has been enhanced to allow the import of Subcontractor requisitions on newly created subcontractors, previously a manual requisition has to first be created.
- The excel requisition with a defined order number will now only check for duplicate order numbers in the organisation to which the template is being loaded to.
- The value of additional costs on unreconciled deliveries of stock items has been added to the value on the Deliveries by selection report.

March 2019

Version 19.0325

- The , symbol can now be used in the Subcontractors requisition instruction field.

Version 19.0304

- The fax number is no longer a mandatory field on the supplier master.
- The logging for any order changes has been enhanced.
- The catalogue price field has been updated to accept up to 4 decimals.
- A potential duplication error on the deliveries by selection report has been corrected.

February 2019

Version 19.0214

- The contract filter and a potential line duplication on the Deliveries by selection report have been resolved.

Version 19.0212

- An error on the PO Listing report has been resolved.
- An issue whereby the ordered quantities on Candy item was being incorrectly recalculated when a requisition with multiple suppliers was raised and subsequent changes orders were cancelled has been resolved.

Version 19.0211

- A variable undefined error being returned for user's version 19.0207 has been resolved.

Version 19.0207

- An error on the Candy Resource Import has been resolved.

Version 19.0204

- A project filter has been added to the Orders by selection, Deliveries by selection and Outstanding deliveries by selection reports.
- Users will now reflect as out of office on all procurement workflow popups when they are flagged as being out of office in the organisation that the workflow is running from.

January 2019

Version 19.0128

- A potential collation error when trying to import Candy resources on a server using the incorrect collation has been resolved.

Version 19.0115

- An issue where the sub-totals on a requisition could be hidden if the signature box was not used on the standard requisition has been resolved.
- The fax number has been removed as a mandatory field on the supplier contacts screen.