



Signature

Job Import Guide

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Overview

Job Import allows you to enter job information into a familiar tool (Microsoft Excel), validate that the information is correct, then import that information into Job Cost. You can create new jobs and update existing jobs, with or without estimates. This tool also provides an audit trail of when and by whom an estimate is created.


In addition, you can use the Job Import spreadsheet to create a template job, which can be based on an existing job or new job.

 Job Import supports only a subset of Job Cost features. Be sure to verify imported information for accuracy.

About the Signature Job Import.xlsm file

Signature Job Import.xlsm is an easy-to-use spreadsheet provided by Signature. This spreadsheet includes two worksheets for importing job information: Job Import Setup and Job Import.

The Job Import worksheet contains most of the Job Maintenance fields from Job Cost. You can use this same worksheet multiple times (for each job), or you can make copies of the Signature Job Import.xlsm spreadsheet and use a custom copy for each job.

 You can only update one job at a time.

In addition to the fields already on the Job Import worksheet, you can add more fields as necessary. Refer to [Adding More Fields for a Custom Spreadsheet \(page 9\)](#) for more information.

About the JobImportResults.html file

The data that you import into Job Cost is summarized in a Job Cost Import Log file called JobImportResults.html. Any errors that occur during import also appear in this file.

The import log displays immediately after job data is validated or imported, and the log file is saved in the folder where Job Import is installed. The log file is overwritten each time job data is validated or imported from the spreadsheet, so if you want to save an import log, be sure to move or rename the log file before the next validation or import.

Installing Job Import


You must run the installation once on the server and once on each client computer on which you want to load the custom spreadsheet. You will use the [Installing Job Import on a Server and Client \(page 2\)](#) option or the [Installing Job Import on a Client Only \(page 3\)](#) option, depending on which machine you are installing at the time.

System Requirements

To find a complete list of system requirements across all the Signature modules, please refer to [Signature System Requirements](#)¹.

Before You Install Job Import

Open the SQL Server Configuration Manager. Expand *SQL Server Network Configuration* and select the server for which you will be using Job Import. In the right pane, right-click **Named Pipes** and choose *Enable*. The system will prompt you to stop and restart that SQL server, after which this change will take effect.


 The installation wizard will prompt you to install prerequisites. When you are sure all the necessary components have been installed, choose **Finish** to exit the prerequisite wizard.

When Upgrading From a Previous Version

When you upgrade to version 2016, a default folder called **Signature Job Import 2016** is created, and the installation folder of any previous version may be removed.

If you have a working version of the **Signature Job Import.xlsm** spreadsheet that you would like to save from a previous release, copy this file to a different location so that it is not deleted when the previous version's installation folder is removed.

Installing Job Import on a Server and Client

 If job imports and updates will be done by existing GP users, you will not have to install Job Import on a server.

1. Launch the file **SignatureJobImport-16.1.xx.exe**.
2. On the Welcome screen, choose *Next >*.
3. Accept the terms of the license agreement and choose *Next >*.
4. Select the **Server and Client** radio button, then enter the name of the server where Microsoft Dynamics GP and Signature are installed. If necessary, obtain this information from your system administrator or database manager. Choose *Next >*. Choose the server instance from the drop-down menu. If a named instance has not been set up, use the default *localhost* option. Enter the name of the database and the login information for the system administrator, then choose *Next >*.
5. Use the drop-down menu to select a company database and choose *Add*. Choose *Next >*.
6. Verify the selected databases and choose *Next >*.
7. Accept the default installation location or use the *Browse...* button to find the folder where you want the Job Import application to be installed. Choose *Next >*.
8. When you are ready to begin the installation, choose *Install*.
9. When the installation is complete, choose *Finish*.

¹ <https://wennsoft.atlassian.net/wiki/spaces/1805b07/pages/7507956/Signature+System+Requirements>

Installing Job Import on a Client Only

1. Launch the file **SignatureJobImport-16.1.xx.exe**.
2. On the Welcome screen, choose *Next* >.
3. Accept the terms of the license agreement and choose *Next* >.
4. Select the **Client** radio button and choose *Next* >.
5. Accept the default installation location or use the *Browse...* button to find the folder where you want the Job Import application to be installed. Choose *Next* >.
6. When you are ready to begin the installation, choose *Install*.
7. When the installation is complete, choose *Finish*.

After Installing Job Import

After installing Job Import, complete the following steps:

- [Step 1: Set the Signature Registration Web Service Location \(page 3\)](#)
- [Step 2: Verify User Permissions \(page 3\)](#)
- [Step 3: Assign Users to the WSIMPORT Group in SQL Server \(page 3\)](#)

Step 1: Set the Signature Registration Web Service Location

If you are running Job Import on a different machine than the Registration Web Service, you must customize the Web service location in Job Import settings.

1. Navigate to the installation location, for example, **C:\Program Files\Signature\Signature Job Import 2016**.
2. Right-click the file **Signature Job Import Settings.xml** and choose *Edit*. The file opens in Notepad or an XML editor.

```
<?xml version="1.0" encoding="UTF-8" standalone="true"?>
<Settings>
  <WSRegisterWebServiceLocation>localhost</WSRegisterWebServiceLocation>
</Settings>
```

3. Replace **localhost** with the name of the server where the Signature Registration Web Service is installed.
4. Save and close the file.


Step 2: Verify User Permissions

If you are running Job Import on Windows 2008 Server R2 (64 bit) and using the server as a workstation, make sure you verify that the user has Full Control permissions on the Job Import directory.

1. Navigate to the installation location, for example, **C:\Program Files\Signature\Signature Job Import 2016**.
2. Right-click the installation folder and choose *Properties*.
3. Select the security tab, and grant or verify that the user has the Full Control permission level on this folder.

Step 3: Assign Users to the WSIMPORT Group in SQL Server

The steps in this section must be performed ONLY after completing an installation on the server. Users of the Job Import spreadsheet will log in as SQL users. THE WSIMPORT SQL group contains the minimum permissions necessary for users to import jobs into Job Cost.

 These steps must be performed by a qualified system administrator or IT personnel.

1. Open Microsoft SQL Server Management Studio.
2. Expand **Security**.
3. Right-click **Logins** and select *New Login* from the menu. The Login - New window opens.
4. Enter the name of the user.
5. Select the **SQL Server Authentication** radio button and enter and confirm a password.
6. In the left column, select the **User Mapping** page.
7. In the top section of the window, mark the check boxes for the system and company databases.
8. In the bottom section of the window, mark the **DYNGROUP** and **WSIMPORT** user role check boxes.
9. Choose *OK* to save your changes. Repeat the steps above for the remaining users and companies, if applicable.

Setting Up Job Import

1. Open the **Signature Job Import.xlsm** spreadsheet.
2. If macros have been disabled, enable content for the spreadsheet. Choose *Options*, mark the **Enable this content** radio button, and choose *OK*.
3. Select the **Job Import Setup** worksheet.
4. Make sure the following **File Location** paths are correct:
 - **Document Path**
The location where the Job Import Excel file, .DLL files, and other files were installed, ending with a backslash(). For example, C:\Program Files\Signature\Signature Job Import 2016\
 - **Schema Path**
The location where the Job Import schema files were installed (under the Document Path, in a subfolder called **Schema**), ending with the file **jcImportSchema.xsd**. For example, C:\Program Files\Signature\Signature Job Import 2016\Schema\jcImportSchema.xsd
5. In the **User Login Information** section, complete the following fields:
 - **User ID and Password**
Enter a user ID and password. This must be a SQL user that was previously set up.
 - **Datasource**
The server name and instance where Job Cost is installed, separated by a backslash "\".
 - **System Database**
The system database, for example, DYNAMICS.
 - **Database**
The company database to update, for example, TWO.
6. In the **Estimate Import Options setup** section, select options for the following fields, as necessary:

Option	Selection
Allow to create job	Select <i>Yes</i> to allow the creation of new jobs to be imported into Job Cost. You must select <i>Yes</i> if you are creating a new job. Select <i>No</i> if you want to restrict the use of this application so users can only update jobs that already exist in Job Cost.

Option	Selection
Cost Code Must Exist in Master	Select <i>Yes</i> to require that a cost code entered in the spreadsheet must already exist as a master cost code in Job Cost. Cost codes that do not exist will not be imported. This option has no effect if the Cost Codes debit posting accounts option is marked on the Posting Options window in Job Cost. If you are using cost code posting, the cost code must already exist for the import to work.
Copy Cost Code Description from Master	Select <i>Yes</i> if you want the cost code description from the master cost code to be used for the cost code entered in the spreadsheet.
Add Estimates Together for Same Cost Code	Select <i>Yes</i> if you want multiple entries in the spreadsheet that have the same cost code and cost element to be combined when imported to Job Cost. This includes the estimated amounts and units. This option has no effect if the Estimate Cost by Period option is marked on the Posting Options window in Job Cost.

7. When you are finished choosing setup options, save the spreadsheet.

Proceed with entering estimate information, see [Using the Job Import Worksheet \(page 5\)](#).

Using the Job Import Worksheet

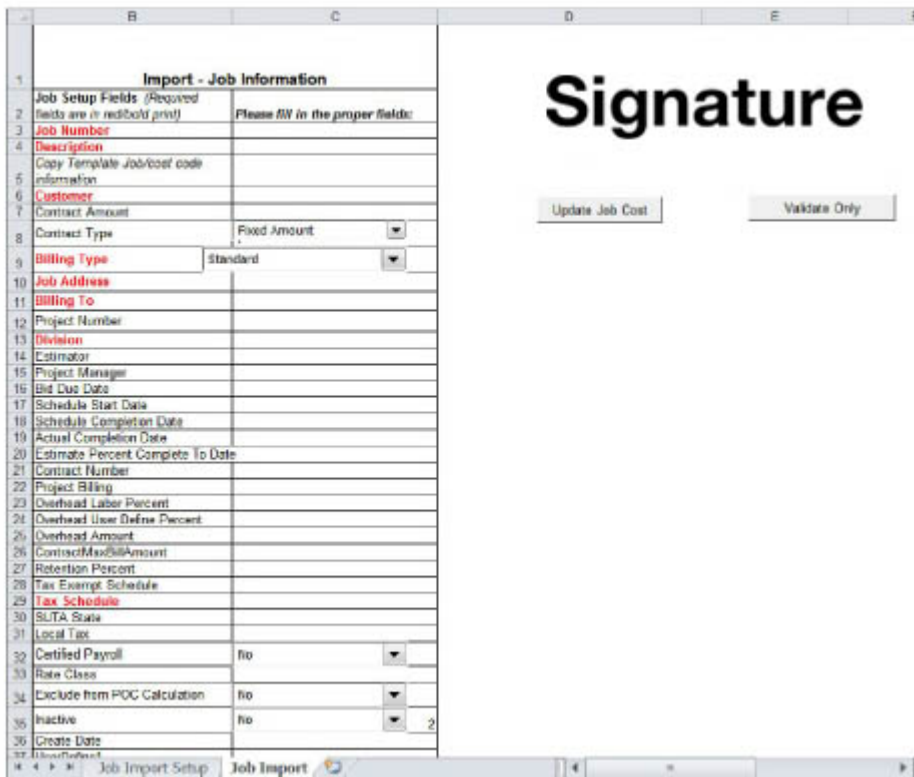
Job data is imported using the following process:

Step 1: Complete the Job Import worksheet using the guidelines below

There are three main sections on the Job Import worksheet: Job Information, Cost Codes & Estimates, and Bill Code Numbers.

Most of the fields in each section are self-explanatory, as they correspond to fields in Job Cost. When you enter data into the cells, remember the field requirements and restrictions in Job Cost. These same rules apply to imported data.

For example, the Job Number field in Job Cost is limited to seventeen characters; therefore, if you are creating a new job in the custom spreadsheet, the Job Number must be seventeen characters or less. If you exceed the number of characters, Job Cost will not be updated with the new job. Be sure to check the information that you import for accuracy.



Unused fields

The following fields are not used with this release of Job Import:

- Project Billing,
- ContractMaxBillAmount
- Exclude from POC Calculation

Required fields

Required fields are marked clearly in red. If you attempt to validate or update Job Cost with any required fields blank, those fields are marked with an error in the **JobImportResults.html** import log file.

The remaining (non-required) fields can be completed as necessary, either in the worksheet or in Job Cost after the data has been imported.

Date fields

Dates must be entered into date fields using the following format only:

YYYY-MM-DD For example, 2015-05-22

The year must be four digits; the month, two digits; and the day, two digits (with single digit months and days padded with a "0"). The year, month, and day must each be separated with a dash, and the order cannot be switched.

About specific fields

- **Cost Code Number field**
The cost code you enter must exist as a master cost code in Job Cost and match the cost code format set up in Job Cost.
- **Cost Element field**
You must enter the number that represents the cost element (for example "1" for Labor); you cannot enter the description (for example, just "Labor").
- **Division**
You can only change divisions for a job if you are NOT using the Percentage-of-Completion posting option in Job Cost and you ARE using the "Change division after costs are posted to a job" setup option. You cannot change the division for a job if any of the following exist for the job: 1) unposted costs, 2) unposted invoices, 3) committed costs.
- **Bid Due Date and Create Date fields**
These fields are informational only and do not appear on any Job Cost windows; they are stored in the tables for quick retrieval.
- **Estimate Amount**
This field (in the Import - Cost Codes & Estimates section) is automatically calculated based on the Estimate Amount/Unit and Estimate Units columns. DO NOT delete the Estimate Amount cells. If you have to clear and start over, clear ONLY the Estimate Amount/Unit and Estimate Units fields.

Creating estimates to import

When you use the Job Import worksheet to import cost codes and estimates into Job Cost, those estimates are handled differently depending on whether the Estimate Cost by Period option is turned on in Posting Options. The system date determines what period the transactions are assigned to.

EXAMPLE

The following estimate is entered on 5/08/15:

Cost Code Number	1-10-3
Cost Element	1 (Labor)
Estimate Amount / Unit	\$100.00
Estimate Units	10
Estimate Amount	\$1,000.00

On 5/10/15, you realize that the estimate needs to be updated, and you enter the following:

Cost Code Number	1-10-3
Cost Element	1 (Labor)

Estimate Amount / Unit	\$100.00
Estimate Units	20
Estimate Amount	\$2,000.00

- If the **Estimate Cost by Period** option is **ON**, the system accumulates estimates from the multiple estimate entries. In this example, the total estimate for the cost code is **30** units at **\$3,000**. If you were to create an additional estimate for the month of June on 6/08/15, for **5** units at **\$500**, the total estimate for the cost code would be **35** units at **\$3,500**.
- If the **Estimate Cost by Period** option is **OFF**, the system replaces the first estimate with the second estimate. In this example, the new estimate for the cost code is **20** units at **\$2,000**.

Step 2: Validate the information entered on the worksheet

When you finish entering information on the Job Import worksheet, the data should be validated before you actually update Job Cost. This allows you to see whether the update is going to be successful based on the requirements of the Job Cost system. If, for example, you have entered an invalid cost code, validating the information catches and allows you to correct that error.

To validate your data without updating Job Cost, choose *Validate Only*. When the validation is complete, the Job Cost Import Log appears, displaying any errors that were encountered during validation. Refer to [jobcostimportlogfile \(page 9\)](#) below for more information.

If everything is validated successfully, the following message appears:

The import data has been validated.

If the import was not successful, you receive a message with the number of errors found during the validation.

The Job Cost Import Log is also saved in the Job Import installation folder as **JobImportResults.html** if you need to view it again later.

Step 3: Update Job Cost with the changes from the worksheet.

When you have completed and successfully validated the Job Import worksheet, you are ready to import the information into Job Cost. After the import, the corresponding Job Cost records are updated and/or created.

1. On the **Job Import Setup** worksheet, make sure the **Allow to create job** option is set appropriately. If you are creating a new job that does not currently exist in Job Cost, this must be marked **YES**.
2. Double-check your estimates, then choose *Update Job Cost*.
3. When the import is complete, the Job Cost Import Log appears.
 - If everything is imported successfully, the following message appears: *The import data has been validated.*
 - If the import was not successful, you receive a message with the number of errors found during the update.

The Job Cost Import Log is also saved in the Job Import installation folder as **JobImportResults.html** if you need to view it again later. See [jobcostimportlogfile \(page 9\)](#) below.

⚠ If you add project tasks after the initial update to Job Cost, you have to manually add the cost codes in Job Cost. The import does not create new cost codes in Job Cost; it only updates data for existing cost codes.

Viewing the Job Cost Import Log file

The Job Cost Import Log summarizes all the cost code information that was successfully and unsuccessfully imported into Job Cost, including cost code subtotal amounts. This detailed information is useful when there are multiple worksheet entries for the same cost code.

The screenshot shows a spreadsheet titled "Job Cost Import Log" with the user "estimator". It contains two main tables. The first table is a summary table with columns: Job Number, Description, Estimate, Customer, Job Address, and Job To Address. The second table is a detailed table with columns: Cost Code, Description, Element, Estimate Units, and Extended Amount. It lists various cost codes such as 00-1000-001 (Engineering - Labor), 00-2000-001 (Project Management - Labor), 00-4000-007 (Added Costs), and 01-3000-002 (1st Floor - Materials), along with their respective units and extended amounts. A "Bill Codes" section at the bottom shows a total billable amount of \$8.00.

Adding More Fields for a Custom Spreadsheet

You can create a custom spreadsheet by populating the Job Import worksheet with additional fields for importing in Job Cost. You may want to make a copy of the default **Signature Job Import.xlsm** spreadsheet to customize.

⚠ These additional fields cannot be validated. Make sure valid values are entered before importing.

1. Open the custom spreadsheet.
2. If macros have been disabled, enable content for the spreadsheet.
3. Select the **Job Import** worksheet.
4. Scroll down to locate row #59, which contains the headings for fields in the Cost Codes & Estimates section. This is where you can add more fields.
5. Select column I, which is the blank column immediately after the Estimate Measure column. You can add fields beginning with column I.

The labels for these columns must match exactly what is shown in the right column of the table below; otherwise, data entered into those fields will not be imported. **Pay close attention to capitalization.**

For this JC00071 table field	Enter this as the column heading
WS_Manager_ID	ManagerID
WS_Inactive	Inactive
Profit_Type_Number	ProfitTypeNumber

For this JC00071 table field	Enter this as the column heading
Profit_Amount	ProfitAmount
Next_Subdivision_Type	NextSubdivisionType
WS_Account_Index_2	AccountIndex2
Track_Production_Qty	TrackProductionQty
Production_Estimate_Qty	ProductionEstQty
Production_Actual_Qty	ProductionActualQty
Production_Qty_Curr_Per	ProductionQtyCurrPer
Production_Best	ProductBest
Production_Best_Date	ProductionBestDate
Production_Measure_Code	ProductionMeasureCode
Bill_Type	BillType
Sched_Completion_Date	ScheduleCompletionDate
ACTCOMPDATE	ActualCompletionDate
Schedule_Start_Date	ScheduleStartDate
ACTSTARTDATE	ActualStartDate
Billing_Schedule_Line	BillingScheduleLine
WRKRCOMP	WorkComplete
Labor_Group_Name	LaborGroupName
User_Define_1	UserDefine1

For this JC00071 table field	Enter this as the column heading
User_Define_2	UserDefine2
USERDEF1	USERDEF1
USERDEF2	USERDEF2
User_Def_Integer_1	UserDefInteger1
User_Def_Integer_2	UserDefInteger2
User_Defined_Integer_3	UserDefInteger3
User_Defined_Integer_4	UserDefInteger4
User_Defined_Dollar_1	UserDefDollar1
User_Defined_Dollar_2	UserDefDollar2
User_Defined_Dollar_3	UserDefDollar3
User_Defined_Dollar_4	UserDefDollar4
USRDAT01	UserDefDate1
USRDAT02	UserDefDate2
User_Defined_Date_3	UserDefDate3
User_Defined_Date_4	UserDefDate4
User-Defined_CB_1	UserDefCheckBox1
User-Defined_CB_2	UserDefCheckBox2
User-Defined_CB_3	UserDefCheckBox3
User_Defined_CB_4	UserDefCheckBox4

For this JC00071 table field	Enter this as the column heading
VNDRNMBR	VendorID
ITEMNMBR	ItemNum
PORDMNMNR	PurchaseOrderNum

Troubleshooting

Refer to this section for help with errors you may encounter when validating or importing information.


- [Compile Error \(page 12\)](#)
- [Cost Code Error \(page 12\)](#)
- [Accounts Index Error \(page 13\)](#)

Compile Error

If you have upgraded from a previous version of Job Import, you may encounter the following situation the first time you are working with the spreadsheet and choose to *Validate Only* or *Update Job Cost*. Microsoft Visual Basic for Applications opens, with the error message, *Compile error: Can't find project or library*.

Steps to work around:

1. In the error message window, choose *OK*. The References - JobCostImport window opens. You can also open this window by choosing *Tools > References*.
2. Unmark the checkbox next to **WSJobImport**.
3. Scroll down and mark the checkbox next to **Signature Excel Job Import**.

 If step 3 fails, you can also mark the Signature Excel Job Import checkbox by using the *Browse* button to open the *WSJobImport.tlb* file from the location where Job Import is installed, for example, C:\Program Files\Signature\Signature Job Import 2016.

4. Choose *OK*.

Cost Code Error

You may receive an error message telling you that the master cost code does not exist. *This cost code does not exist in the cost code master table and cannot be imported. Please set up the master cost code.*

- If you are using cost code posting, job information cannot be imported if a cost code is missing from the cost code master table. You must set up the cost code before the import can be completed successfully.
- If you are using division posting, the **Cost Code Must Exist in Master Job Import Setup** option determines if you can import job information when the cost code does not already exist in Job Cost.

Accounts Index Error

You may receive an error message telling you that the GL account does not exist.

The account number is missing. The cost code cannot be imported. Please set up the master cost code table.

If you are using cost code posting, the GL account index for a cost code cannot equal zero. If the GL account is missing from the master table for one of the cost codes, you must set up the account index before the import can be completed successfully.

Job Import Readme

System Requirements

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at <https://www.wennsoft.com/wsportal/product-downloads>.

Compatible Signature Version Numbers

Signature 2018 R4 or higher

General Information

- The Job Cost Import does not support the entire Job Cost feature set; rather it supports only a subset of features. Be sure to validate your imported data to ensure the import functioned the way you expect.
- Multicurrency is not supported.
- If creating a new job that involves AIA billing, you must fill in the Architect ID in Job Cost, as this field is not available in Job Cost Import.
- Job Cost Import is available in English only.

Contact Information

Support

Phone: 262-317-3800

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Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for additional information.

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