



CONTRACTOR RELEASE DOCUMENT - DECEMBER 2019

Ability to approve HUD section 3 and lock from editing

Contractor Database Area Affected: *Set Up > Add/Edit Employees > HUD Section 3*

This feature allows an administrator to approve a HUD selection. Once the section is approved, the Contractor can no longer edit the HUD information until it is unapproved by the Admin.

Please note: This will only be enabled if your administrator has turned this feature on!

Feature update – Project Match

Contractor Database Area Affected: *Set Up > Add/Remove Project Match*

This feature has an updated look, and new functionality. This feature now also allows users to differentiate multiple contracts under one project.

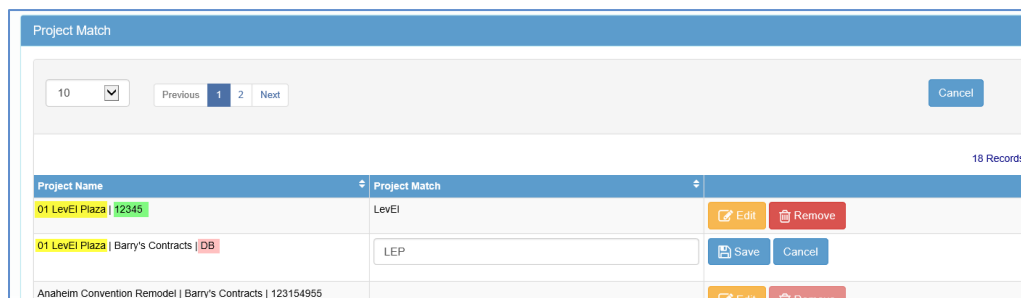
This function is useful for an upload file that consists of records from more than one project and/or multiple contracts on the same project. You can upload one file, and the system will pull the records into the correct projects. The project match function matches your **accounting system project ID** to the **LCPtracker project name**.

For example, you can have a single project (**01 LevEI Plaza**) that you have multiple contracts for (**12345** and **DB**)

When establishing a project match, your accounting software can use the following:

Project Name in LCPtracker	Contract ID in LCPtracker	Project ID from accounting software file
01 LevEI Plaza	12345	LevEI
01 LevEI Plaza	DB	LEP

The new look allows you to view all projects/contracts at once, which makes it easier to review the Project Matches you have added and identify the ones you still need to establish. Clicking **Edit** will allow you to add or update the Project Match and **Remove** will simply take away the Project Match previously saved.





With Project Match and uploading your payrolls, you will simply select the week end date and there will be no need to select the project when the project code is on your upload. Now that it's matched, the system will upload and place records under the matched project/assignment –

Edit Uncertified Payroll Records

Project
01 LevEI Plaza | 12345

From Date To Date Load Data

Delete Selected Run Match Craft Report

<input type="checkbox"/>	Week End Date	Employee Name	Contractor Craft	Jurisdiction	Craft	Classification	
<input type="checkbox"/>	06/08/2019	LEVI, ELINOR	LBRR	California	LABORER AND RELATED CLASSIFICATIONS	Group 1	Craft Match Edit Delete

Edit Uncertified Payroll Records

Project
01 LevEI Plaza | Barry's Contracts | DB

From Date To Date Load Data

Delete Selected Run Match Craft Report

<input type="checkbox"/>	Week End Date	Employee Name	Contractor Craft	Jurisdiction	Craft	Classification	
<input type="checkbox"/>	06/08/2019	LEVI, ELINOR	LBRR	California	LABORER AND RELATED CLASSIFICATIONS	Group 1	Craft Match Edit Delete

Report update – revised parameters

Contractor Database Area Affected: *Reports > Certified Payroll Summary Report*

Report no longer allows users to select “All Projects” and will be required to choose a single project to run the report for

Certified Payroll Summary Report

Certified Payroll Summary selection parameters

Report by: Project Contractor

Select Department
-- All Departments --

Select Project *
Select Project

Include Closed Projects

Select Contractor
All Contractors



Contractor Setup update – status

Administrator Database Area Affected: *Set Up > Contractor Setup > Add/Edit Contractors*

For users that are transferring contractors from B2G or other source, the status of a contractor cannot be changed back to Pending once they have been made Active.

Add or Edit Contractor Information **Add Mode**

To add a new contractor, enter information and save. To edit an existing contractor, select it from the list first.
You can view all the contractors in the system. You can only edit your own data after it has been entered.

Department
-- All Departments --

Select a contractor to edit ...

Company Name (Contractor) *

Federal Tax ID Number D-U-N-S Number PWCR Number

Contractor License No. or 10-digit Phone Number * Contractor License Expiring Date Status
Active
Pending

Contractor License (To Display on Certified Payroll)

New Validation – VAL_75 for expired craft/classifications

Contractor Database Area Affected: *2. Notices*

Note: This validation will only be for Contractors that upload their payroll and are trying to use an edited or outdated classification.

Contractor side:

Notice(s) / Warning(s) for this record
The craft/classification selected expired as of 1/1/2019. Please contact your project Administrator to enter an updated rate or select a new craft by clicking "Edit" in the Classifications section above. VAL_75



Edit Employees update – Apprentice Information field

Contractor Database Area Affected: *Set Up > Add/Edit Employees*

The field “Apprentice Period/Level” has been updated to read “Apprentice Period/Level/Step”

Select Employee To Edit

Filter Employee Selection

Select an Employee * Only the first 1000 employees are loaded, use filters to narrow down the list

ELINOR, LEVI (D Goode Inc.) x Help

Add / Edit Employee Information

Demographic Classifications

HUD Section 3 Information

Apprentice Information

Apprentice ID: 3573.314663

Apprentice Rate Percentage: 45.00

Apprentice Period/Level/Step: 2

Apprentice Approval: Approved

Apprentice Approved Date: Approval Expire Date: Apprentice Registration Date: Apprentice Approved By:

Contractor Assignment update – WA State Intent ID field

Contractor Database Area Affected: *Set Up > Subcontractor Setup > Subcontractor Assignment*

New field that allows users to collect this information during contractor setup

Contractor Assignment

Add New Assignment

Select a department: -- All Departments --

Select project to display: Select project / all projects

Select contractor to display: Select contractor / all con...

Project	Contractor	Sub To
01 LevEI Plaza	Barry's Contracts	Sandra Electrical
01 LevEI Plaza	D Goode Inc.	Prime
01 LevEI Plaza	D Goode Inc.	Barry's Contracts
01 LevEI Plaza	Sandra Electrical	D Goode Inc.
Anaheim Convention Remodel	Abel Building	D Goode Inc.
Anaheim Convention Remodel	Abel's Subcontractor	D Goode Inc.
Anaheim Convention Remodel	Barry's Contracts	Prime

Add Assignment

Select a department: -- All Departments --

Select a project: Select a project

Contractor to be assigned:

As a subcontractor to (Leave blank if above is to be a prime contractor for the selected project):

Start Date: End Date: Contract ID: Responsibility Code:

Contract Amount: WA State Intent ID:

Notes:

Cancel Save



Projects tab update – WA L&I XML button

Contractor Database Area Affected: *Projects > Certified Payrolls*

Projects Certified Payrolls

Project:
WASHINGTON SOUND EXPANSION | Prod11202019

Help

Payroll Certifications						
Week End Date	Performing	Accept Status				
07/06/2019	YES	Submitted	Edit	Report	WA L&I XML	Details

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WA L&I XML button will allow users to download the XML file compatible with the Washington L&I site.