JAMIS®
TOWN HALL

APRIL 2020
Virtual Meeting

Agenda

Topic	Details	Time
Welcome	Today's Agenda	11:00 –11:05
JAMIS Updates	Company, Support and Services Updates	11:05 – 11:30
Product Update	5.3x, 6.1, 6.3, 6.4, 7.0, Mobile, 7.1	11:30 –12:15
JAMIS Expense Overview	What's coming in JAMIS Expense	12:15 – 12:45
Wrap-up and Adjourn		12:45 – 1:00

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Questions for Today's Virtual Meeting

- Please ask questions via the Questions dialog

- We will answer as many questions we can in the time allowed

- We will answer all questions and send them to all attendees

JAMIS Company Update

- Company Update – Solid Q1, Strong Financials
- Changing Landscape
- Communication Plans
- Product & Services Offerings Might Change
- How best do we stay connected to you?

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JAMIS Announcements and Upcoming Events

Item	When	For More Information
JAMIS Training + FPSOnline Annual Subscription (Unlimited access to JAMIS and GovCon industry training on-demand)	Web On-Demand	https://info.jamis.com/jamistraining-fpsonline
JAMIS Prime/Power BI (Info and product demos available)	Web On-Demand	https://jamis.com/primepowerbi/
Coffee Talk: COVID-19's Regulatory Compliance, Financial, and Performance Impacts on Government Contractors JAMIS and Capital Edge Consulting 3-Part webinar series	Tuesday April 28 11:00-11:30am ET	https://info.jamis.com/coffee-talk
JAMIS Prime Customizations Webinar Overview of system customization, and what possibilities are available to customers	Wednesday April 29 2:00-3:00pm ET	https://register.gotowebinar.com/register/2652684358571977996
JAMIS Expense in Prime 6.4 Webinar Overview on the new Expense Application	Thursday April 30 2:00-3:00pm ET	https://register.gotowebinar.com/register/6647097952115070991

Save the Date
Summit 2020
October 4-8, 2020
Nashville, TN

summit.jamis.com

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summit 2020

Support Update

- Working from Home Contact Info:
  - Please make sure you let us know how to best reach you if you are working from home.
- Issue Reporting:
  - When reporting an issue, please remember to include relevant details and information so we can perform troubleshooting.
  - This includes trace error logs, screenshots, Excel spreadsheets, etc.
- Customer Newsletter:
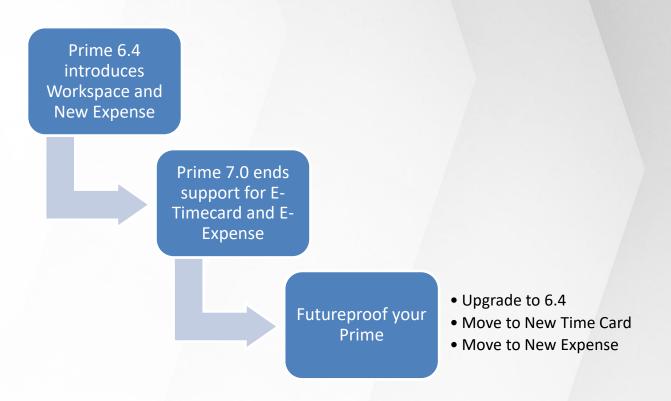 - Be sure you read the customer newsletter, it includes useful support Do's and Don't's

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JAMIS Prime Consulting Services

- Prime 6.4 Upgrade
- New Expense Implementation
- New Time Card Conversion
- Prepare for Workspace
- General Customizations

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Futureproof your Prime

Prime 6.4 introduces Workspace and New Expense

Prime 7.0 ends support for E-Timecard and E-Expense

Futureproof your Prime

- Upgrade to 6.4
- Move to New Time Card
- Move to New Expense

Prime 6.4 Consulting

Configuration, Training, Testing, Go Live Support

- Prime 6.4 Upgrade Assistance
- New Expense Implementation
- New Time Card Conversion
- General Customizations

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Scheduling Consulting Services

- Contact JAMIS Support to schedule a call with a JAMIS consultant

Product Update

Summary of JAMIS Prime Version Support

	5.3	6.1	6.3
Full Support Date	**August 2016**	**August 2018**	**February 2020**
End of Development Support	**December 2019**	**January 2020**	**October 2020**
Development Support	No	No	Yes
Test with new browsers	No	No	Yes
Test with new mobile app	No (20200316.1)	No (20200316.1)	Yes
Functional or Security updates	No	No	Yes
Functional or Security Patches	No	No	Yes
Perform Customizations	Yes	Yes	Yes
Customer Service support	Yes	Yes	Yes
Last Version	**5.3.3_20190808.2**	**6.1_20200122.1**	**6.3_20200326.1**

JAMIS Product Roadmap Timeline

2020

2021

6.1

6.3

6.4 (New Expense)

7.X

8.X

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Prime 6.3 Status

- Stage:
  - Current Release
- Release:
  - 6.3_20200326.2
  - See JAMIS News Alert sent 4/7/2020
  - Working on May update

Update available for JAMIS Prime 6.3

A new update, version 6.3_20200326.1, is available for anyone running JAMIS Prime release 6.3.

To schedule this update for your JAMIS Prime software, please email the JAMIS Support Center at support@jamis.com, or call 1-877-878-7403 between 7 a.m. and 5 p.m., Pacific Time, Monday through Friday.

You are receiving this news alert as a primary contact at your company. Please share this information with all administrative and employee users at your company who will be affected by the update.

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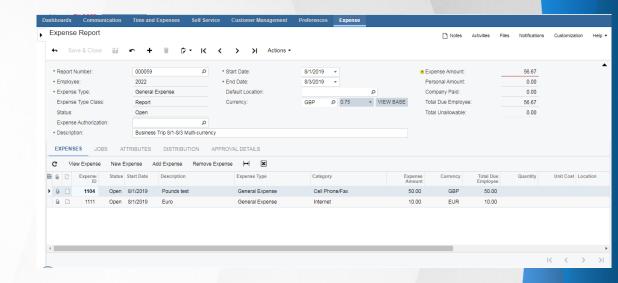
Prime 6.3 May Update

- Fixed an issue with creating a PowerBI widget when running on Docker Swarm
- Adding support for employee labor category groups for expand by employee and employee/labor category in ARM Reports
- Fixed an issue with Allocation Batches staying in open state after they posted
- Mobile
  - iOS: Fixed issues with earning code, task and labor category not defaulting in
  - iOS: Fixed an issue with time clock where the time had to be changed to work
  - Others TBD

Prime 6.4 Status

- Stage:
  - QA completing
  - Ready for Early Adopter
- Release:
  - JAMIS Go Live Target 4/13
  - GA: Q3 2020

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Prime 6.4 – Expense Management

- New Expense Management Module replaces existing e-xpense
- Built into Prime framework
- Improved design
- Improved usability
- Improved functionality
- Deploys as a new module

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Prime 6.4 - Projects & BP Enhancements

- Projects
  - Markup table filter for direct only
  - Changed Government Priority Rating to be user definable
  - Corrected issues with Caps table uploads
  - Visual warning when in CUB/CUR mode
- Business Planning
  - BP Planning worksheet performance when including actuals
  - Added Prism to BP Recalculate Rates

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Prime 6.4 - Employee & Labor Enhancements

- Employee
  - Added new tabs
    - Delegate for expense
    - Assignment/approval map view
- Labor
  - Support for Fringe with Prevailing Wage
  - Support new approval framework support for time card and time off
  - Renamed e-timecard time zone to Home Location for time card default when not using prevailing wage

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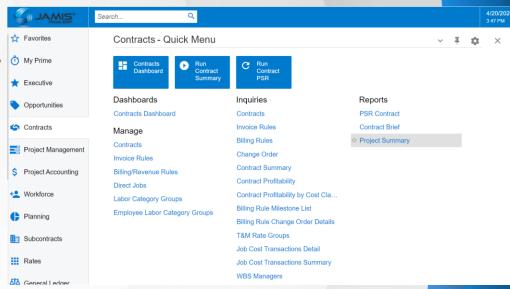
Prime 6.4 - Financial Enhancements

- Fixed Assets
  - Added change tracking for Tag # and Organization
  - Made Pending Action and Owning Agency user definable
  - Asset Depreciation report
- Add View Source Document to AR Invoices that open the Project Billing Batch
- Reporting
  - Standard Unbilled and Expense Reconciliation reports
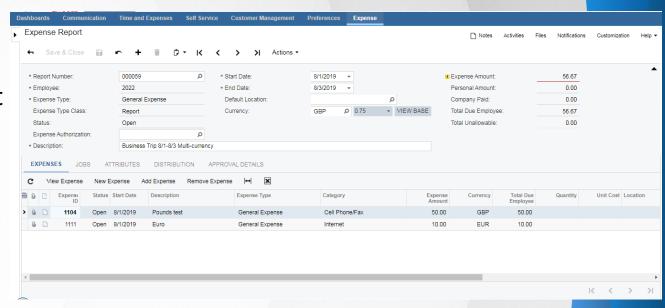 - Trial Balance Range of Periods (no sub account)

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Prime 6.4 – Other Enhancements

- New approval maps
  - Time Card and Time Off Requests
  - Legacy 2nd level will be deprecated
- JAMIS Outlook Plug In.
- Modern User Interface
  - New Customers/Demo Only
  - Program for existing customers second half of 2020
- **Last version with e-xpense and e-timecard support**

Prime 7.0 Status

- Stage:
  - In Development

- Release:
  - EA Late Q3
  - Field Trial Q4

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Prime 7.0 - Framework Update (1/2)

- Dashboards upgrades
  - Graphics, Parameters, easier publish to mobile
- GI upgrades
  - Color coding, easier filtering (quick filters, pivot as tab (workbook), side panels, total footer, easier publish to mobile and number of records. Export params to separate worksheet
  - GI as import scenario source
- Business Events and Mobile Push Notifications.
  - Able to push inquiry and data changes events to users including mobile
- Enhanced Salesforce Sync
- Separate use of Branches and Company
  - Color code UI by Branch
- Resource monitoring and database size
- LRP Feedback frame

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Prime 7.0 - Framework Update (2/2)

- Pop-up notes for vendor, customer and inventory items
- Access restriction for changing the business date
- User defined fields expansion
- Mobile
  - Forms added to the customization framework
  - MSDL editor
- Approve and reject reasons on all approval workflow. Managed in approval map.
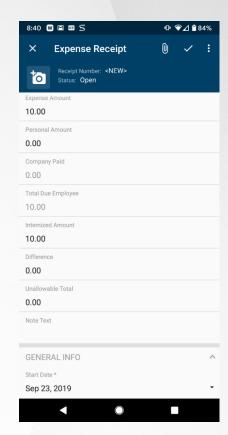- Document mgmt. Add Link
- Native 2 – Factor authentication

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Prime 7.1 Status

- Stage:
  - In Product Management
- Release:
  - EA TBD
  - Field Trial TBD
- Focus:
  - Business Planning
  - Resource Management
- Want to get involved?
  - Sign up to participate in product requirements reviews!

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Mobile Status

- Stage:
  - New apps in Beta
- Release:
  - 2nd Quarter
- Enhancements
  - Expense Support
  - New MSDL
  - Support for 7.0 features

JAMIS Expense in Prime 6.4

Getting Acquainted with the new JAMIS Expense

- Today: High-level overview on the new JAMIS Expense
- Next Thursday 4/30, 2:00-3:00pm ET: Live product demonstration
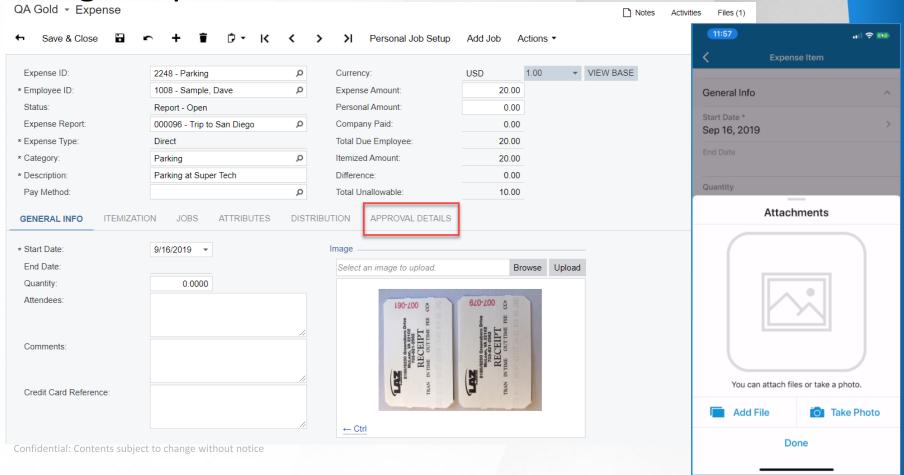
JAMIS Expense Overview

- Expenses vs. Expense Reports

- Expense Authorization

- Mobile Expense App

- Lodging Expenses

- Per Diem Meal Expenses

- Approval Workflows

- Per Diem Schedule Management
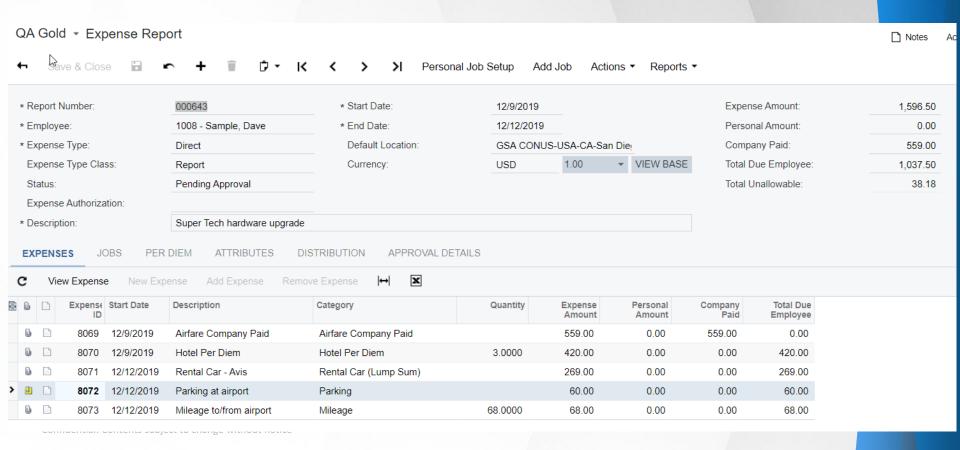
Expenses vs. Expense Reports

- Single Expense Submission
  - Suited for general expenses such as a cell phone bill, cup of coffee, lunch, office supplies, business meals, etc. that are not part of a trip
  - Not suited for trip-related expenses where you have
    - Several expenses associated with a trip
    - Expenses that require itemization such as lodging and per diem
  - Can have it's own approval workflow
- Expense Report
  - The traditional expense report for several expenses associated with a trip
  - Can have multiple approval workflows

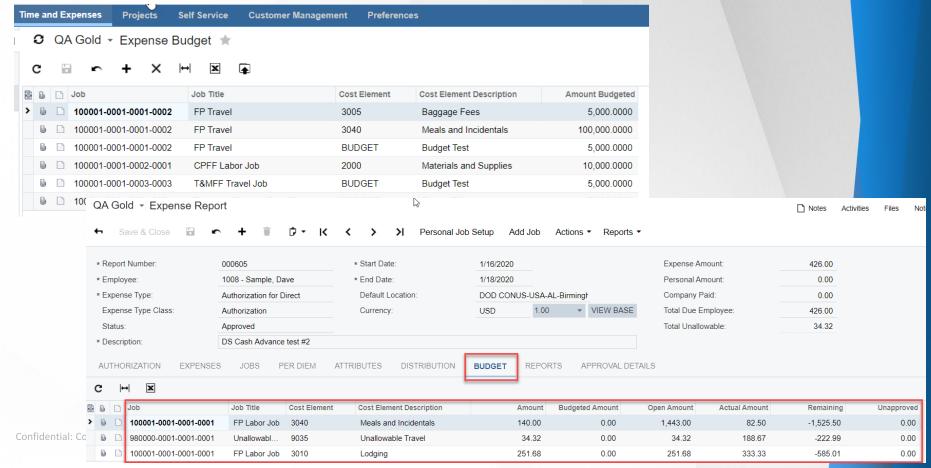# Single Expense Submission

Expense Report Form

Notes   Ac

↩ Save & Close   💾   ↶   ✚   🗑   📋 ⌄ |◀   ◀   ▶   ▶| Personal Job Setup   Add Job   Actions ⌄   Reports ⌄

* Report Number:	000643		* Start Date:	12/9/2019	Expense Amount:	1,596.50
* Employee:	1008 - Sample, Dave		* End Date:	12/12/2019	Personal Amount:	0.00
* Expense Type:	Direct		Default Location:	GSA CONUS-USA-CA-San Die|	Company Paid:	559.00
Expense Type Class:	Report		Currency:	USD 1.00 ⌄ VIEW BASE	Total Due Employee:	1,037.50
Status:	Pending Approval				Total Unallowable:	38.18
Expense Authorization:						
* Description:	Super Tech hardware upgrade					

EXPENSES   JOBS   PER DIEM   ATTRIBUTES   DISTRIBUTION   APPROVAL DETAILS

↻   View Expense   New Expense   Add Expense   Remove Expense   ↔   ☒

			Expense ID	Start Date	Description	Category	Quantity	Expense Amount	Personal Amount	Company Paid	Total Due Employee
🔗	📄		8069	12/9/2019	Airfare Company Paid	Airfare Company Paid		559.00	0.00	559.00	0.00
🔗	📄		8070	12/9/2019	Hotel Per Diem	Hotel Per Diem	3.0000	420.00	0.00	0.00	420.00
🔗	📄		8071	12/12/2019	Rental Car - Avis	Rental Car (Lump Sum)		269.00	0.00	0.00	269.00
🔗	📄		**8072**	12/12/2019	Parking at airport	Parking		60.00	0.00	0.00	60.00
🔗	📄		8073	12/12/2019	Mileage to/from airport	Mileage	68.0000	68.00	0.00	0.00	68.00

Expense Authorization

- Expense Authorization
  - May be optional or required for certain types of expenses
  - Supports multiple expense reports per authorization
- Cash Advances
  - Cash advances may be requested if authorized
  - Cash advances create pre-payment memo for employee
  - Cash advances are deducted from amounts owed to employees for travel reimbursement during payment process
- Commitments & Budgeting
  - Automatically creates commitments to display on PSRs
  - Supports static and BP time-phased budgets

Expense Authorization Form

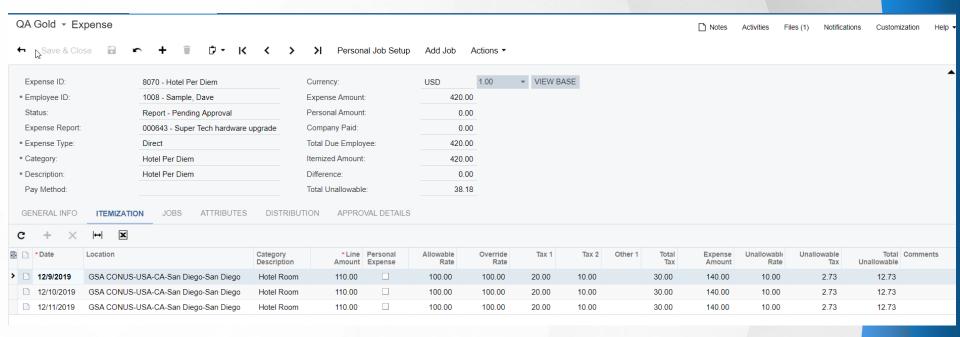# Expense Authorization Budgeting

Mobile Expense App

- Enter and submit single expenses

- Enter and submit expense reports

- Not recommended for complex expense reports or trips

- Capture receipt images

- Supports mobile approvals

Lodging Expenses

- Supports US Gov't and Custom daily rate schedules
- Automatically calculates unallowable rate and associated tax
- Supports rate override during approval process
- Provides ability to itemize details, including meals, parking, taxes, fees, internet usage, and more
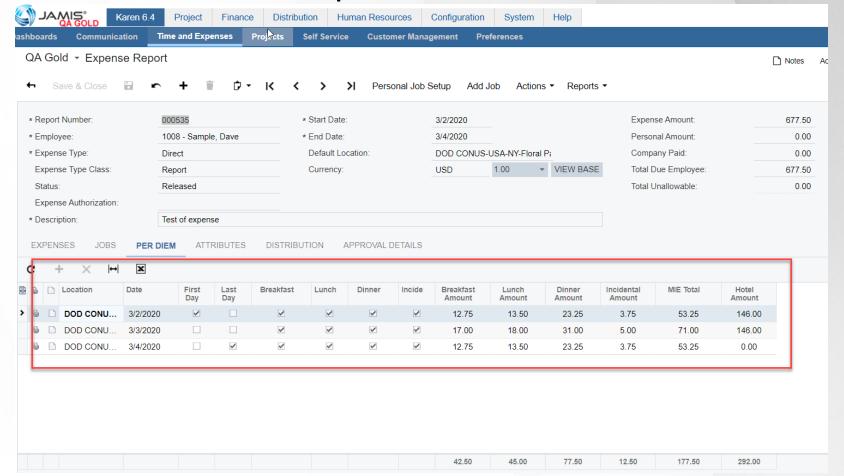
Lodging Expenses

Per Diem Meal Expenses

- Per Diem automatically calculates breakfast, lunch, dinner, and incidentals based on trip start and end dates
- First/Last day of travel rules (75%) enforced, including consecutive days
- Automatically ensures meals can only be claimed once
- Options to check or not check meals by default
- Traveler can view amounts and de-select any meals provided by others
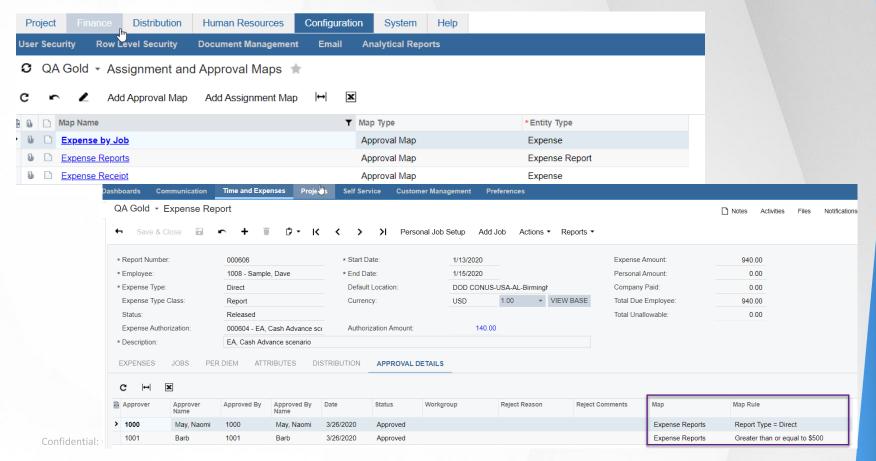- Traveler may change locations for any day

Per Diem Meal Expenses

Expense Approval Workflows

- Supports multiple parallel or serial approval workflows
- Approve by Report
  - Direct Manager, Supervisor, or Other as needed
  - Threshold approvals
- Approve by Job
  - The PM
  - Multiple PMs
- Approval for Unallowable Expenses
  - Supports notification and approvals for unallowable expenses
- Approve by Receipt
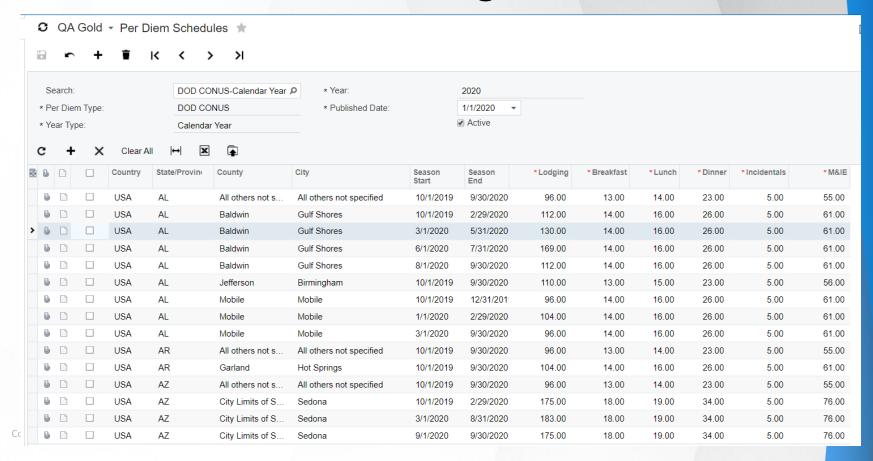 - Usually the last step in the process prior to processing

Expense Approval Workflows

Per Diem Schedule Management

- Supports multiple government (CONUS/OCONUS) and custom rate schedules

- Improved location search capability

- Supports rate seasonality

- Rate sensitivity by day eliminates need to have multiple schedules for the same schedule type

- Maintain rate schedules with easy-to-use Excel file upload

Per Diem Schedule Management

Wrap Up and Adjourn

- Thank you for attending!
- Register for JAMIS Expense webinar on Thursday April 30
- Sign up to participate in the upcoming Product Requirements and User Experience reviews for Business Planning
- Register for JAMIS Summit