

5 Workflows to Streamline Information Sharing

To Help Contractors Plan,
Do and Manage

Using Viewpoint Field Management to
Connect and Share Real-Time Information



Trimble
Construction

Everyone knows the jobsite is where the magic happens. It's where all of those construction project concepts and drawings get realized in physical form and where different teams with different specialties come together to work collaboratively toward a common goal.

In a complex modern operating environment, contractors need new ways to connect information, avoid risks and streamline work. Using manual processes and spreadsheets to collect and share information leaves projects vulnerable to costly mistakes, miscommunication, rework, and project slowdowns.



Successful contractors are turning to powerful, cloud-based construction management solutions like **Trimble Construction One**, a suite of connected construction software that scales to support the entire construction lifecycle. Delivered in the cloud, Trimble Construction One solutions use real-time data as a single foundation to connect your people, processes and projects.

Project managers working remotely and workers on the jobsite can get the very latest data they need to plan, do and manage their projects.

One of the ways Trimble Viewpoint is bringing the power of Vista to the jobsite is with **Viewpoint Field Management**.



Viewpoint Field Management extends the back-office ERP functionality to the jobsite via a mobile app that can collect data in the field and synch with the back office. Capture labor time from the field, access daily huddles and production reports, facilitate purchase orders, material receipts and requisitions, and process equipment maintenance tasks.

These real-time field functionalities give entire project teams up-to-the-minute project data at their fingertips. They streamline processes in the field so projects keep moving on schedule and on budget.

Read on for five examples of common workflows between the office, project team and field that **Viewpoint Field Management** simplifies and improves:



1. Mobile Time Entry, Payroll Review and Operational Reporting: Workflow



1. A superintendent enters crew time in Viewpoint Field Management from the jobsite.

2. Payroll is reviewed, approved and posted by the payroll manager in the office, while labor time from Vista PR updates Vista Job Cost.

3. The project manager reviews the project's operational reports, which pull job cost data directly from Vista. The top report incorporates payroll data and more to show the gain/loss versus the original contract estimate.



1. Mobile Time Entry, Payroll Review and Operational Reporting: **Benefits**

Field Management:

- Crews get paid on time, every time
- Saves time in collecting and processing labor time
- Fewer errors and payment delays keep crews happy

Accounting Professionals:

- Payroll posts quicker, using less accounting team time
- Reduces manual or duplicate data entry
- Less missing or erroneous information due to consistent fields

Operations/PM Professionals:

- Payroll data and job cost reports are consistently up to date for project managers
- Gives project managers better insight into labor costs on jobs

2. Pending Purchase Orders: Workflow

The screenshot shows the 'Create Pending Purchase Order' form in the ViewpointOne Employee Portal. The form includes fields for Company (1 - KayStyle Sample Company), Order Date (04/10/2019), Expected Date (04/25/2019), Description, Notes, Vendor (Home Depot), Job (100), and Job Description (No Job). Below the job description, there are three job entries: JCO-1 - 1 - 1000 - Olympic Headquarters, JCO-1 - 1 - 1001 - Key Bank - Midland, and JCO-1 - 1 - 1002 - St. Thomas Hospital.

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1. A superintendent enters pending purchase orders from the jobsite into Viewpoint Field Management.

The screenshot shows the 'Purchase Order Dashboard' in the ViewpointOne Employee Portal. It displays a list of pending purchase orders with columns for Order ID, Order Date, Description, Job, Vendor, Submitted, and Approved. The table contains five rows of data.

Order ID	Order Date	Description	Job	Vendor	Submitted	Approved
221	3/16/2019	Concrete	2	Johnson Controls		
230	3/15/2019	PO description	1005 - 100	Construction Supply Co.		
219	3/8/2019	new po	1000 - 2	Johnson Controls		
218	3/5/2019	description	1000 - 30018	Home Depot		

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2. The project manager reviews the purchase orders and can route in the proper transparent workflow.

The screenshot shows the 'Purchase Order Dashboard' in the ViewpointOne Employee Portal on a desktop. It displays a list of pending purchase orders with columns for Order ID, Order Date, Description, Job, Vendor, Submitted, and Approved. The table contains five rows of data.

Order ID	Order Date	Description	Job	Vendor	Submitted	Approved
221	3/16/2019	Concrete	2	Johnson Controls		
230	3/15/2019	PO description	1005 - 100	Construction Supply Co.		
219	3/8/2019	new po	1000 - 2	Johnson Controls		
218	3/5/2019	description	1000 - 30018	Home Depot		

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3. The purchasing agent creates a purchase order in Vista once approved in Viewpoint Field Management.



2. Pending Purchase Orders: **Benefits**

Field Management:

- Purchase orders can be easily generated from the field rather than relying on the back office
- Fewer delays with purchasing approvals means work can be done quicker in the field

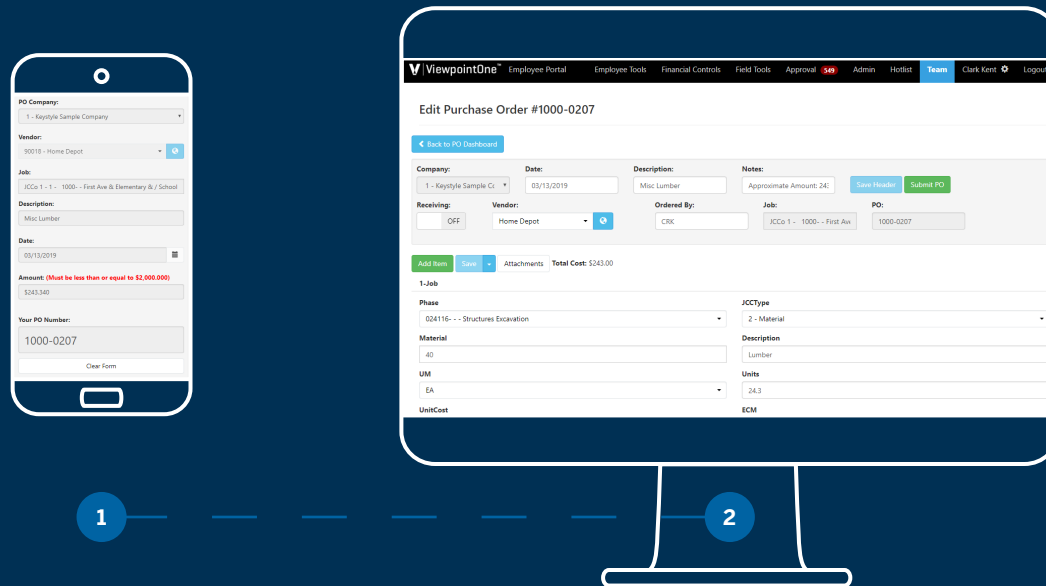
Operations/PM Professionals:

- Makes purchase order review simpler and more efficient
- Automated workflows mean less time spent tracking down where open purchase orders stand

Accounting Professionals:

- Purchasing agents' workloads reduced by streamlining data entry
- Provides simpler way to look up, review and process purchase orders
- Reduces chances of errors or miscommunication

3. Field Purchase Orders: Workflow



1. A superintendent purchases parts at the counter of a local supplier. A purchase order number is generated by Vista and surfaced in Viewpoint Field Management—right then and there.

2. The project accountant codes the purchase order to a job, phase, cost code, expense, inventory, equipment or service work order in Viewpoint Field Management.



3. Field Purchase Orders: **Benefits**

Field Management:

- Field crews can make quick purchases they need to get the job done without the red tape
- Simple-to-use format makes purchase orders easy
- Project delays while waiting for PO approvals are reduced

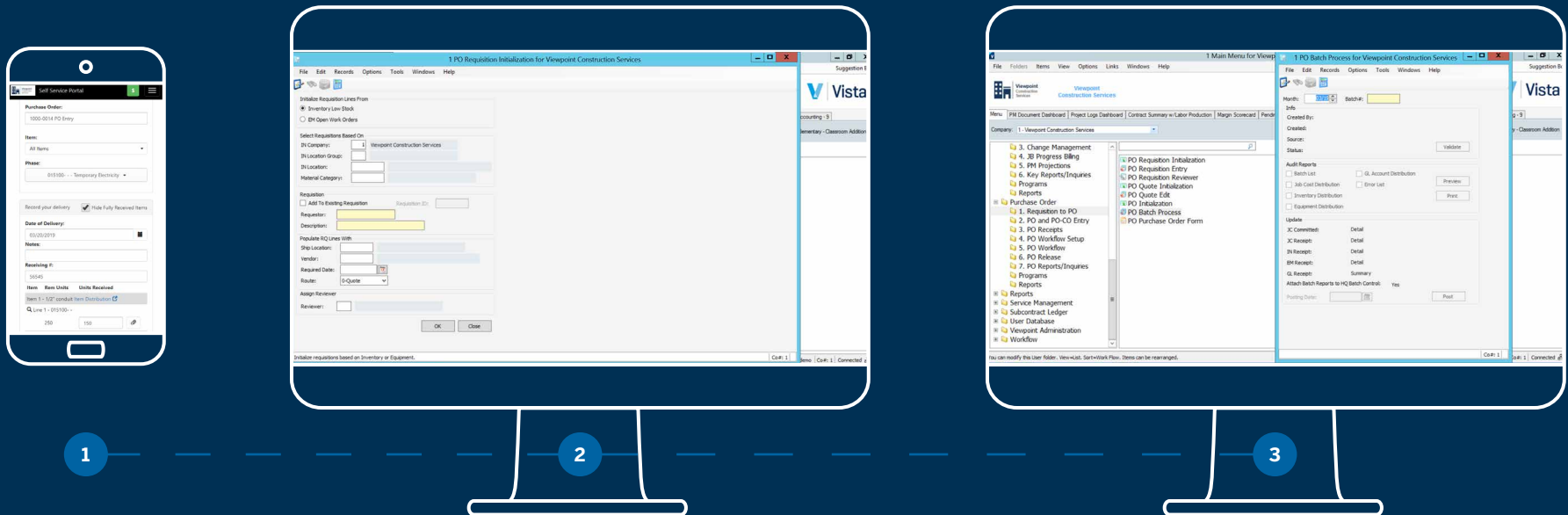
Accounting Professionals:

- Streamlines PO processes and frees up more time for accounting staffs
- Creates easy-to-review audit trail to ensure all costs and expenses are accounted for

IT Professionals:

- Reduces need to maintain a separate expense management system for field crews
- Encryption keeps sensitive company data, like payment information safe

4. Material Receipt: Workflow



1. A foreman receives material on the jobsite in Viewpoint Field Management by verifying the item(s) and quantities match data in Vista. Receiving documents are captured and uploaded.

2. The accounts payable department receives the invoice and initialize the purchase order in Vista. Auto-populated documents enable a three-way match to be performed.

3. Payment is processed in Vista once the verifications performed satisfy requirements.



4. Material Receipt: **Benefits**

Field Management:

- Simplifies the process for receiving materials in the field
- Speeds up material requisition and delivery process
- Reduces errors and miscommunications over material receipt

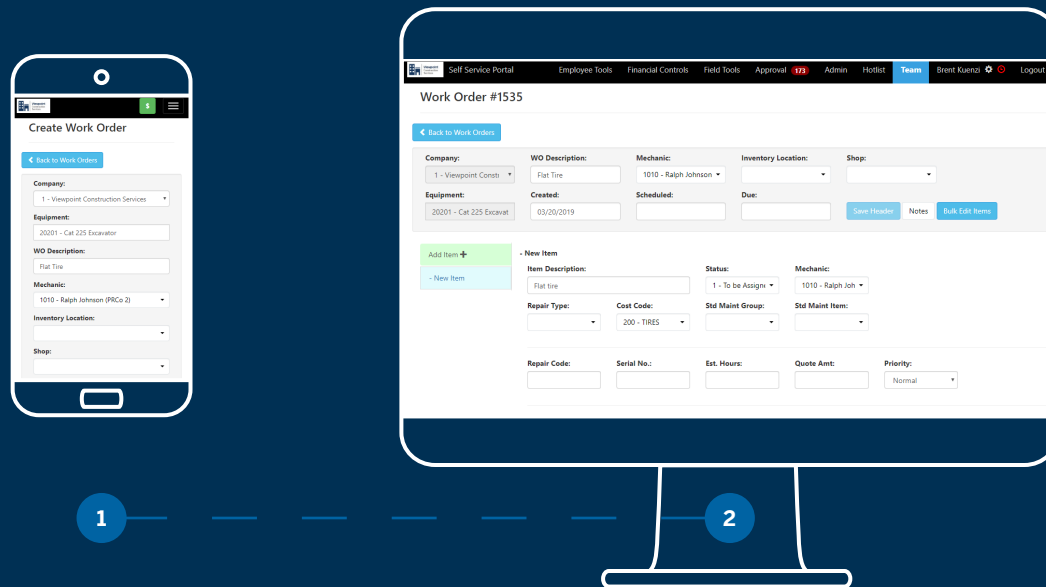
Accounting Professionals:

- Auto-population of documents saves significant time from data re-entry
- Speeds up payment processes to ensure bills are paid
- Easier to track material receipts or lookup information when needed

Operations/PM Professionals:

- Ensures that materials on the jobsite are always correct and onsite when needed
- Keeps projects moving and crews well-informed

5. Equipment Maintenance: Workflow



1. An equipment manager initializes a work order in Viewpoint Field Management and assigns it to a mechanic.

2. The mechanic can update the work order details, enter meter information and make transfers in Vista via Field Management.



5. Equipment Maintenance: **Benefits**

Operations/PM Professionals:

- Streamlines equipment management tasks
- Ensures the right maintenance is being done to the right equipment
- Maximizes equipment life and usage on jobsites to avoid costly breakdowns

Owner/Executive Team:

- Provides reassurance that important capital assets are being properly cared for
- Gives insight into equipment health to know when new equipment purchases will be needed
- Improves overall project productivity by having the best equipment in the field at all times



ABOUT TRIMBLE VIEWPOINT

Trimble Viewpoint construction software solutions, part of Trimble Connected Construction, allow contractors to better manage their projects, processes and people, using the data gathered to lower risk and improve margins. With more than 40 percent of the ENR 400 on our platforms, Trimble Viewpoint innovations are transforming the construction industry by connecting operations across financial and HR systems, project management tools and mobile field solutions.

For more information, please visit [Viewpoint.com](https://viewpoint.com)

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