

# 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

	🗗 🗠 🗐 📄 🖡		dows Help • • • • • • • • • • • • • • • • • • •			8				BEST AM Fri Nev 20	<ul> <li>Inamuleuppetit.com</li> </ul>
	Seq: 09 Employee Date Totals Reg: 9.00 0T: 0.00	Employee Pay Period Tota 367.74 Reg: 41.00 1,/ 0.00 0T: 0.00	Is Job Pay Period Totals	3.00 3.00	CERTIF	IED JOB				CONTRACT SUMMA	RY AT COMPLETION
Employee Clock	Job	Phase	Date 10/15/18							\$1.3M	\$1.1M • • • • •
46	Grid Info BatchSeg Copy (0-3	Pay Seg Type	Employee Fulltame	acco lash	(0) Phase	Hours	Usage EM	Co Equip	Amount	PROJECTED VALUE SLIM	PROJECTED EST COST \$4.94
ployee	¥									EST PROFIT	EST MARGIN
•		1 J - Job 1 M - Mechanic	200 Kent, Clark R 200 Kent, Clark R	1 1000	013100	2.00	2.00	1 10105	81.72	\$195.6K •••••	15.1% 🚥
	47	1 M - Mechanic 1 S - SM Work Order	200 Kent, Clark R 200 Kent, Clark R	1		2.00	2.00	1 11103	81.72	ORIGINAL EST PROFIT \$157.3K PROFIT THE PROFIT \$159.3K	ORGINAL EST PARISH 12/N PROJECTED EST MARIEN 12/NE
k a time:	40	1 3-300 0000	200 Kent, Clark R	1		3.00	2.00	1 11003	122.58	PROJECTOR EST PROPERT \$150.7K	PROJECTED EST PARIE IN 19.96
AM 8:45 AM 8:55 AM 9:00 AM	78	1 J - Job	375 Geczi, Michael T	1 1005	024113	8.00			220.00	Outs Ian	refreshed on Nov 16, 2010 at 124-809.
	79	1 J - Job	375 Geczi, Michael T	1 1005	221000	8.00			220.00		
	80	1 J - Job	375 Geczi, Michael T	1 1005		8.00			220.00		
Clock-In	81	1 J - Job	375 Geczi, Michael T	1 1005	221000	8.00			220.00	BILLINGS-TO-DATE	
Clock-In at 8:49 AM?	82	1 J - Job	375 Geczi, Michael T	1	012100	4.00		_	110.00 326.88		
CALCULATION OF A PARTY	86	1 J - Job 1 J - Job	200 Kent, Clark R 200 Kent, Clark R	1 1000		8.00		-	325.88		
		1 3-300	200 Kent, Clark R	1 1000		8.00			326.88	36%	57%
CANCEL Ok	89	1 J - Job	200 Kent, Clark R	1 1000		8.00			326.88	BALED	COMPLETE
	301	1 J - Job	190 Mariota, Marcus A	1		8.00			2,000.00		
	102	1 J - Job	300 Orwell, George J	1		8.00			0.00		
	203	1 J - Job 1 J - Job	300 Crivell, George 3 100 Kuenzi, Brent	1 1000	024000	8.00		-	0.00	BillED 10 OW10	RECEIVED TO ONTE
	110	1 J-300	100 Kuenzi, Brent 100 Kuenzi, Brent	1 1000		8.00		1 10103	400.00	\$468,261	\$259,938
	110	1 3-300	90 White, Perry A	1 1000		8.00			280.00	COST TO DATE	REVENUE TO DATE
	112	1 J - Job	150 Mariota, Marcus A			5.00			1.250.00	\$572,654 0467/34058 BULD	\$650,232 #57#9#64
										-\$181,971	\$46,826
											0
											3

 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.

### $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$

# 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:

#### Operations/PM Professionals:

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

- 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

V ViewpointOne" Employee Portal	V ViewpointOne" Employee Portal	The four two	logy
Create Pending Purchase Order	Purchase Order Dashboard	There there are a set of the set	
Exert the thermal       Carage Ca	Nexter Syse:       Search         Standar Syste:       Search         Standar Syste:       Search         The Bandar Syste:       Search         The Bandar Syste:       Search         The Bandar Syste:       Search         Standar Syste:       Search         The Bandar Syste:       Search         Standar Syste:       Search         Standar Syste:       Search         Standar Syste:       Search         Standar Syste:       Standar Syste:         Standar Syste:       Standar S	C: Mountain fill water water beginning fill being water being bei	d Dansie Bon GD Int Pan
1	2	3	

 A superintendent enters pending purchase orders from the jobsite into Viewpoint Field Management. 2. The project manager reviews the purchase orders and can route in the proper transparent workflow.

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

# 2. Pending Purchase Orders: Benefits

#### Field Management:

Operations/PM Professionals:

#### Accounting Professionals:

- 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

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

•	ViewpointOne" Employee Portal Employee Tools Financial	Controls Field Tools Approval 👀 Admin Hotlist Team Clark Kent 🗘 L
PO Company:	Edit Purchase Order #1000-0207	
1 - Keystyle Sample Company *		
indor:	✓ Back to PO Dashboard	
10018 - Home Depot 🔹 🤇		
	Company: Date: Description:	Notes:
Co 1 - 1 - 1000 First Ave & Elementary & / School	1 - Keystyle Sample Cr   O3/13/2019  Misc Lumber	Approximate Amount: 24! Save Header Submit PO
ription:	Receiving: Vendor: Ordered By	/: Job: PO:
c Lumber	OFF Home Depot • O	JCCo 1 - 1000 First Aw 1000-0207
3/2019	Add Item Save - Attachments Total Cost: \$243.00	
nt: (Must be less than or equal to \$2,000.000)		
40	1-Job	
	Phase	JCCType
0 Number:	024116 Structures Excavation	2 - Material
00-0207	Material	Description
	40	Lumber
Clear Form	UM	Units
	EA	• 24.3

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.

### $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$

# **3.** Field Purchase Orders: Benefits

#### Field Management:

Accounting Professionals:

#### IT Professionals:

- 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

- 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

- 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

O Environmentar	IPO Regulation Initialization for Verspoint Construction Services           File Left Record Options Teste Windows Help           IPO Regulation Initialization for Verspoint Construction Services	soggention 1	C 1 Main Merce for W The Folders Terms View Options Laks Windows Help The Windows Terms View Options Laks Windows Help	IPO Batch Process for Verspoint Construction Services       Fire Ear Records Options Tools Windows Help       IPO Same Services       IPO Same Services	Suggestion
Notation Odder Topo Set 11% Brow Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor Processor	Benders (see Block     Benders (see Block     Benders (see Block)     Benders     Ben	ionaring 3] Wanter, Charon Adler	Imm     Thistower barlaue     Imper Lago barlaue     Imper Lago barlaue     Imper Lago barlaue       Immer     Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue       Immer Lago barlaue     Immer Lago barlaue     Immer Lago barlaue	John	9:9 y - Casaron Addo
1				3	a#i1 Connected

 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.

### $\circ$ $\circ$ $\circ$ $\circ$ $\circ$

# 4. Material Receipt: Benefits

#### Field Management:

Accounting Professionals:

### **Operations/PM Professionals:**

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

- 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

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

### $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\bigcirc$

# **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.

### $\circ$ $\circ$ $\circ$ $\circ$ $\circ$

# **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

# Viewpoint.

#### 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

©2021 Viewpoint, Inc. All Rights Reserved. Viewpoint®, Vista<sup>™</sup>, Spectrum®, ProContractor<sup>™</sup>, Jobpac Connect<sup>™</sup>, Viewpoint Team<sup>™</sup>, Viewpoint Team<sup>™</sup>, Viewpoint Field View<sup>™</sup>, Viewpoint Estimating<sup>™</sup>, Viewpoint For Projects<sup>™</sup>, Viewpoint HR Management<sup>™</sup>, Viewpoint Field Management<sup>™</sup>, Viewpoint Financial Controls<sup>™</sup>, Viewpoint Field Service<sup>™</sup>, Spectrum Service Tech<sup>™</sup>, ViewpointOne<sup>™</sup> and Trimble Construction One<sup>™</sup> are trademarks or registered trademarks of Trimble Inc., Viewpoint, Inc., or their affiliates in the United States and other countries. Other names and brands may be claimed as the property of others.

# **Trimble** Construction