




5 **WORKFLOWS** to **STREAMLINE** **INFORMATION SHARING** *Between the Office, Team and Jobsite*

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




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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 today's modern operating environment, contractors need new ways to realize efficiencies, mitigate risks and streamline work to compete. Relying on manual processes or outdated, stand-alone technology to collect and share project data leaves projects more vulnerable to costly mistakes and rework, conflicts or work stoppages that can delay projects, upset clients and shrink profits.



More and more contractors are turning to powerful, cloud-based construction management solutions like Viewpoint Vista, which provides a complete platform of integrated functionality. Delivered in the cloud, that functionality extends to real time data, collaboration and automated workflows from the back office to the field (and vice versa).

This allows project managers working remotely and the workers on the jobsite to get the very latest data they need to make informed decisions and keep projects moving.

One of the ways Viewpoint is extending the power of Vista to the jobsite is through its Viewpoint Field Management solution.



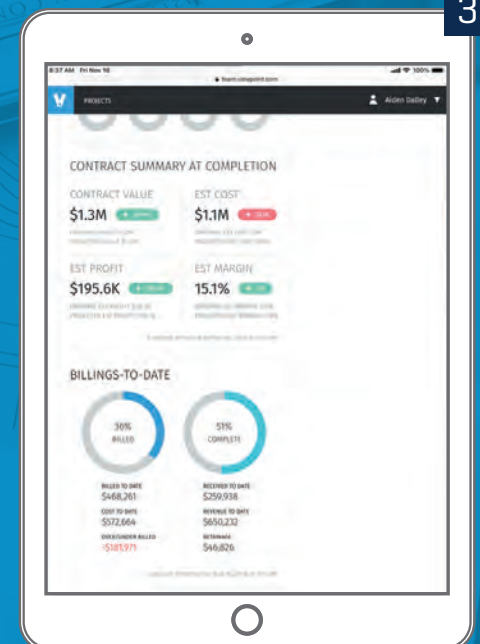
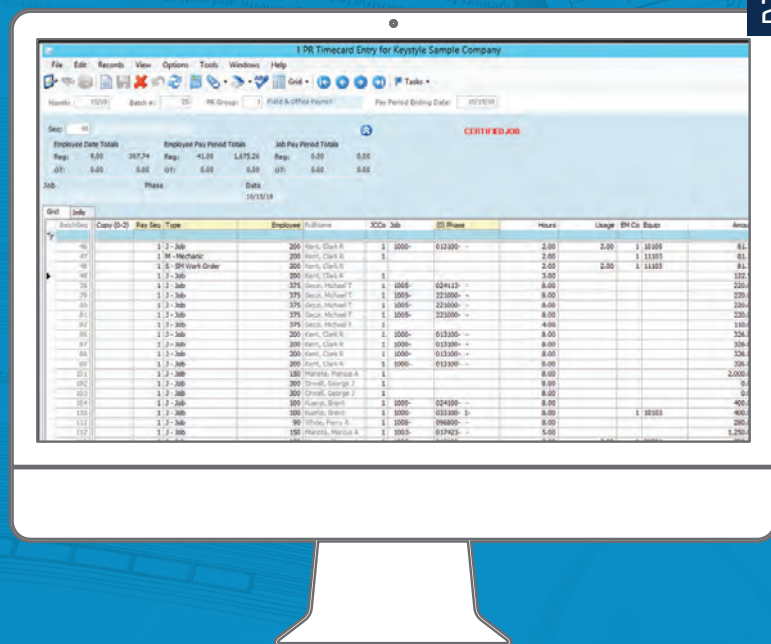
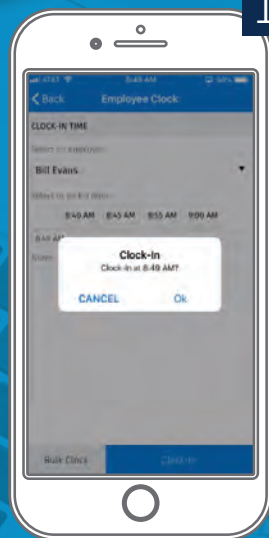
Viewpoint Field Management extends Vista's functionality to the jobsite via a mobile device, while providing a robust solution to collect data in the field and synch with the back office. Capabilities include labor time capture from the field, daily huddles and production reports, purchase orders and requisitions, equipment maintenance and material receipts.

These real-time field functionalities ensure entire project teams have up-to-the-minute project data at their fingertips. Furthermore, they streamline processes in the field to create seamless workflows that keep projects moving in real time.

The following are 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

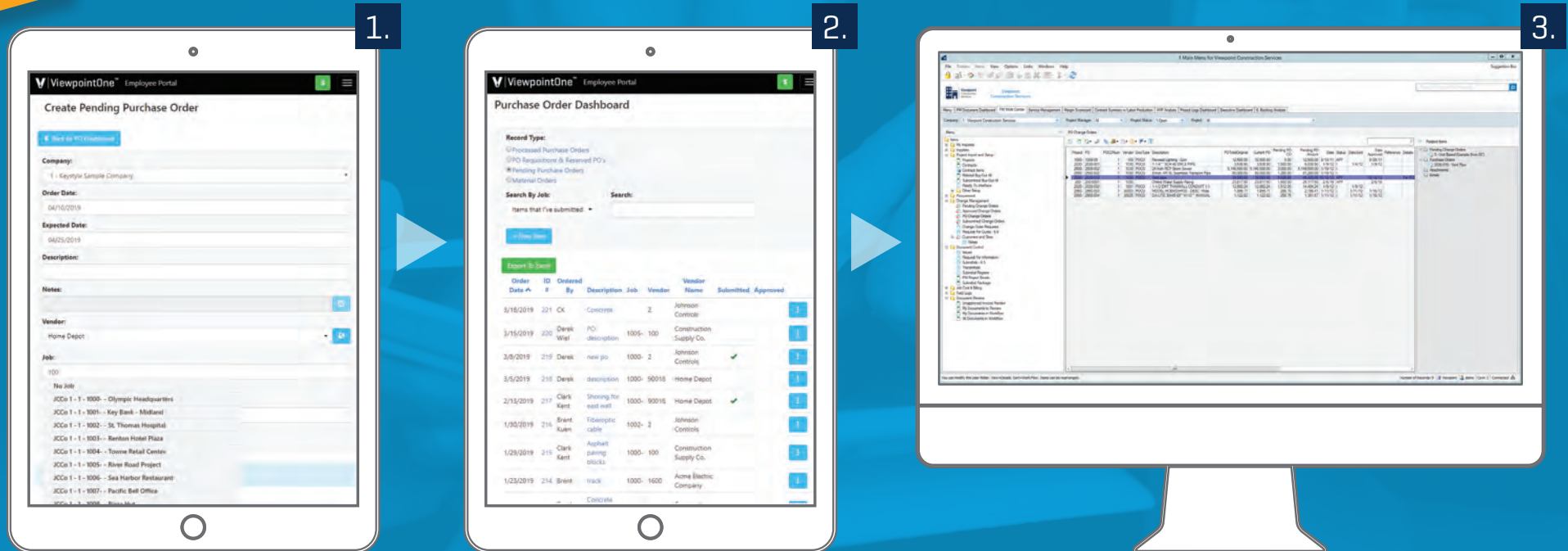


Operations/PM Professionals:

- » 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**



1. 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:

- » 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

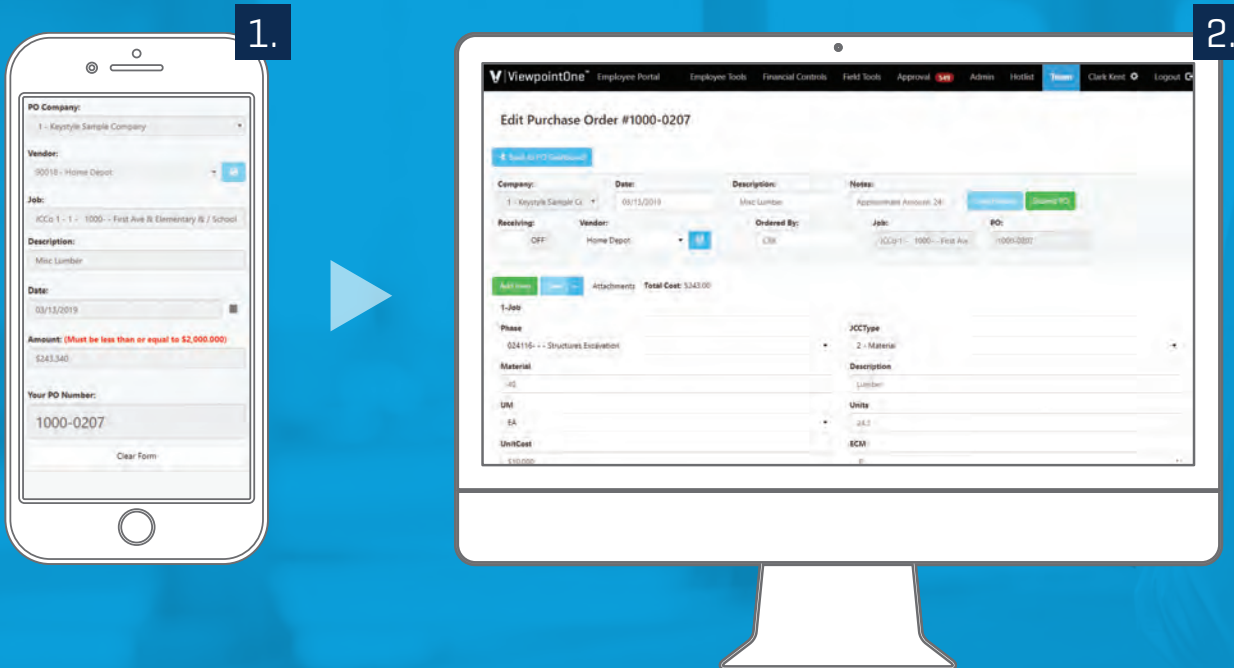


Accounting Professionals:

- » 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



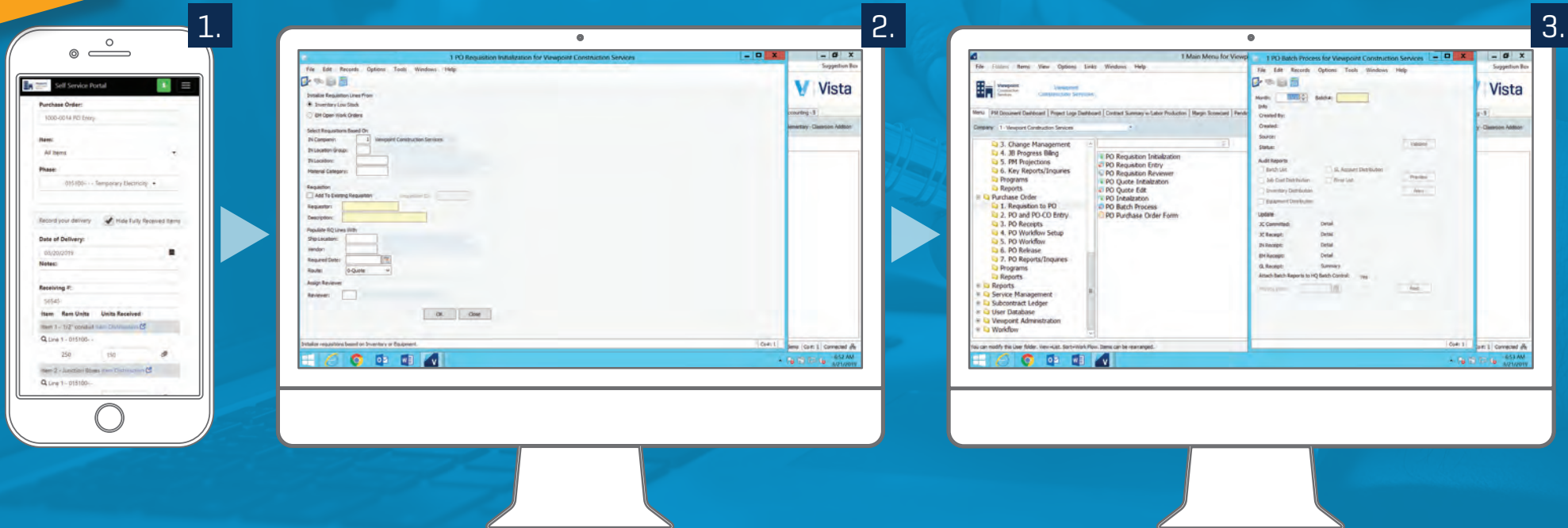
IT Professionals:

- » 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



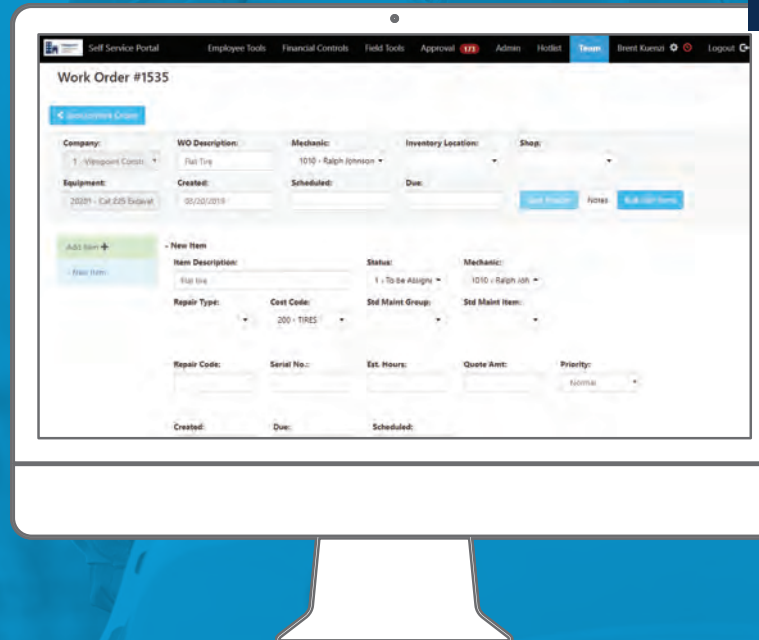
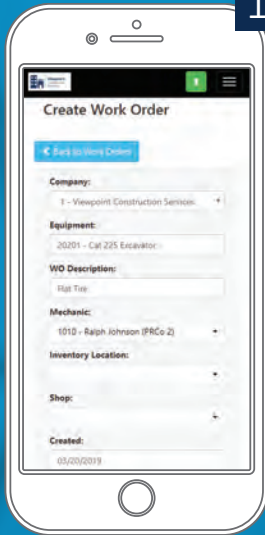
Operations/PM Professionals:

- » 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 to a mechanic.

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

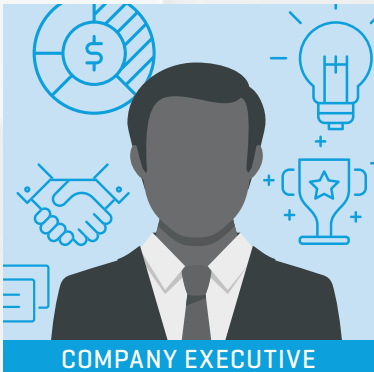
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Equipment Maintenance: **BENEFITS**



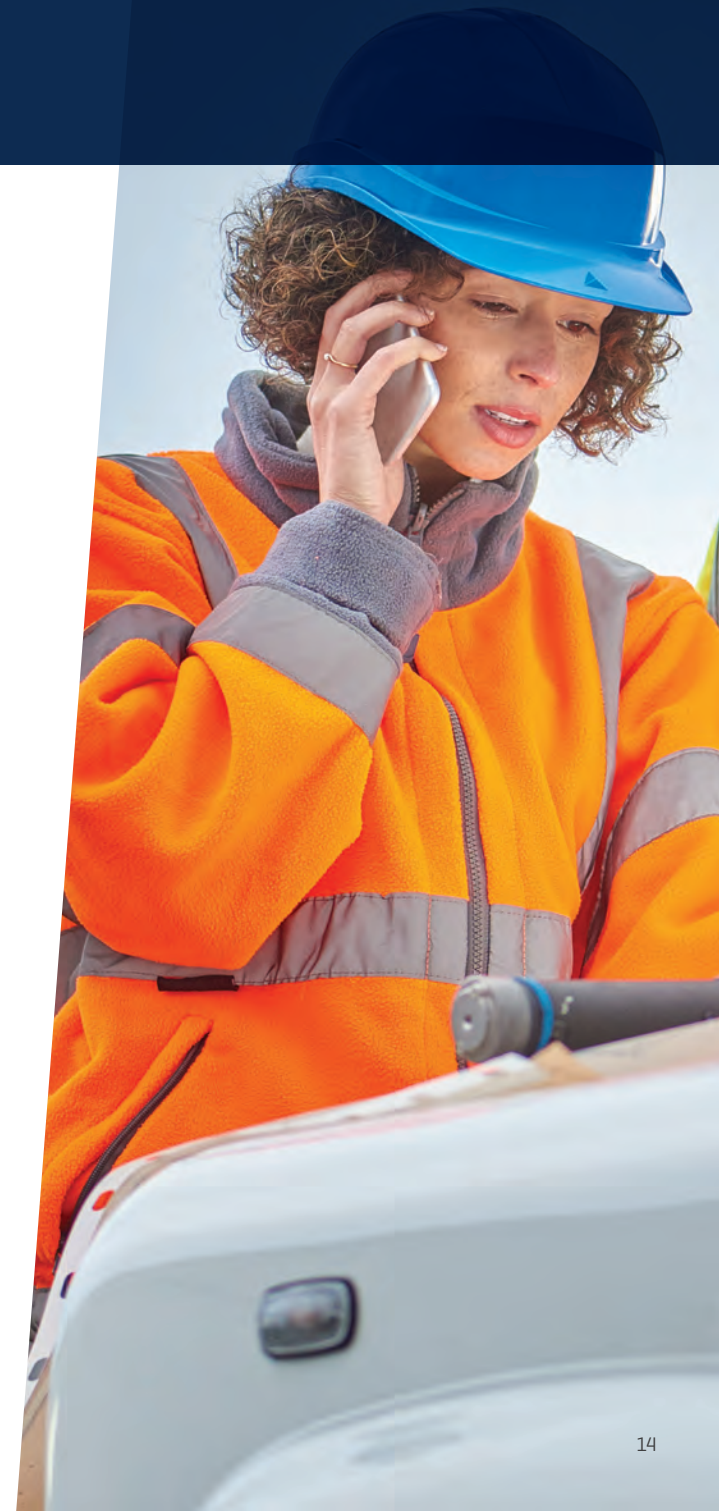
Operations/PM Professionals:

- » 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



Additional Resources:

Simply click each link below to be directed to each item or visit [VIEWPOINT.com](https://viewpointcs.com) to search for these and more resources.

eBooks:

Six Steps to Tearing Down the Construction Productivity Wall — [Link](#)

How ViewpointOne Enables Construction Professionals to Work Smarter, Easier — [Link](#)

Viewpoint: Your Trusted Technology Partner — [Link](#)

Blogs:

Mobile Solutions Empowering Field Teams to do More — [Link](#)

Finding the Equipment Management Sweet Spot — [Link](#)

Just How Much is Your Disconnected Jobsite Costing You? — [Link](#)

Related Client Stories:

KS Industries Speeds up Processes, Boosts Productivity and Saves Money with Viewpoint HR Management and Viewpoint Field Management Solutions — [Link](#)

How Primus Builders is Integrating the Field and Office — [Link](#)

Interstate Electrical Services Corp. Powers Success with Spectrum, Viewpoint Team, Field View and Spectrum BI — [Link](#)

Connect with us at [VIEWPOINT.com](https://viewpoint.com) or call +1.800.333.3197 to see how Viewpoint Vista and Viewpoint Field Management can transform your jobsite workflows into a well-oiled machine, leading to increased productivity and profitability for your organization.

