

# MOBILE FIELD MANAGER

*by Viewpoint Construction Software*

## Field Work Center 3.8

### Trainer's Guide

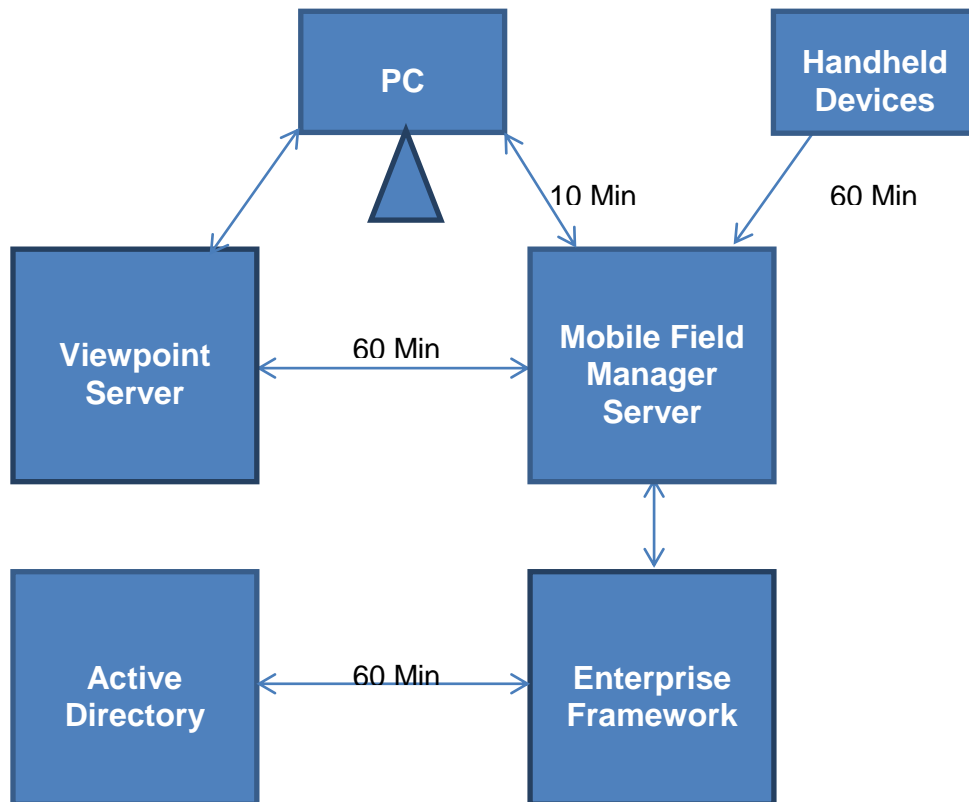




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**Day 1:****Mobile Field Manager Hardware/Viewpoint Workflow**

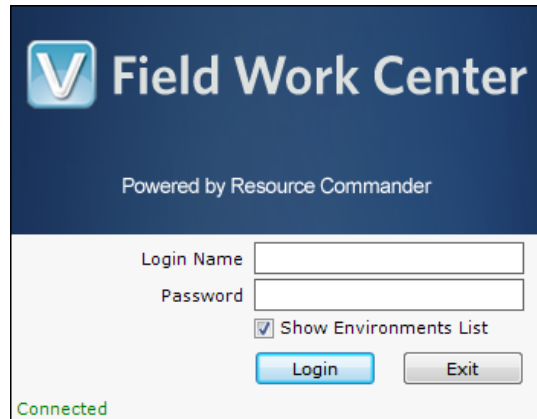
- 1) The PC communicates to Viewpoint and Mobile Field Manager.
- 2) Viewpoint communicates to Mobile Field Manager.
- 3) Handheld devices communicate to Mobile Field Manager (can access without an Active Directory Account).
- 4) Active Directory communicates to the Enterprise Framework and then to Mobile Field Manager.

**NOTES:**

- Payroll is entered and reviewed in in Mobile Field Manager and then uploaded to Viewpoint.
- Working offline is like working with your email exchange; you can work offline and once you're connected to the network, the system will update your workstation to RC.

## How to Log In

1. On the workstation, click on the **Field Work Center**  icon.

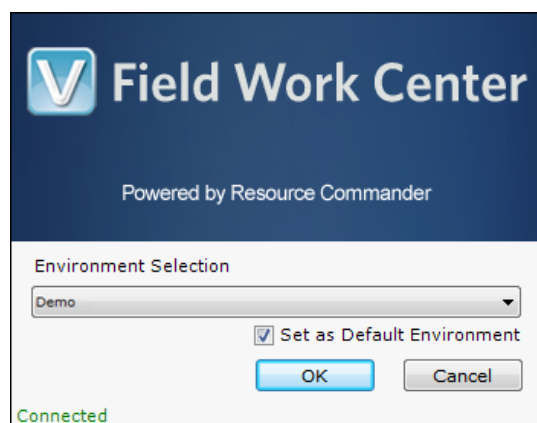


The screenshot shows the Field Work Center login interface. At the top, there is a blue header with the 'V' logo and the text 'Field Work Center'. Below the header, it says 'Powered by Resource Commander'. The main area contains a login form with two text boxes: 'Login Name' and 'Password'. Below these is a checkbox labeled 'Show Environments List' which is checked. At the bottom of the form are two buttons: 'Login' (highlighted in blue) and 'Exit'. In the bottom left corner, the word 'Connected' is displayed in green.

2. **Login Name** - Enter Login Name.
3. **Password** – Enter Password.
4. **Show Environments List** – Check the box to display Environments on the following display.
5. Click **Login** to log into Field Work Center. Click **Exit** to discontinue the login process.

**NOTE:** The **Connected** message displayed in the lower left indicates an active connection to Field Work Center.

If you checked the **Show Environments List**, once you click the Login button, the following screen displays:



The screenshot shows the Environment Selection dialog box. It has a blue header with the 'V' logo and the text 'Field Work Center'. Below the header, it says 'Powered by Resource Commander'. The main area contains a section titled 'Environment Selection' with a drop-down menu showing 'Demo'. Below the menu is a checkbox labeled 'Set as Default Environment' which is checked. At the bottom are two buttons: 'OK' (highlighted in blue) and 'Cancel'. In the bottom left corner, the word 'Connected' is displayed in green.

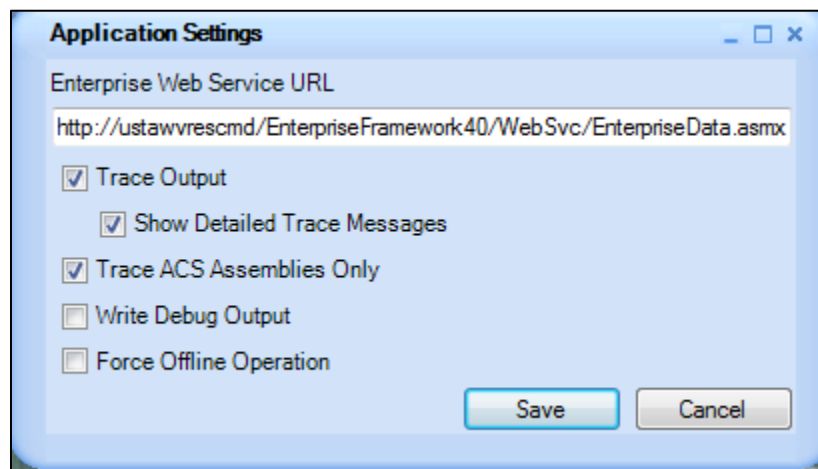
6. **Environment Selection** – Use the drop-down list to select the appropriate environment.

7. **Set as Default Environment** – Check this box to make the selected Environment a standard default.
8. Click **OK** to use the selected environment. Click **Cancel** to discontinue the login process.

**NOTE:** If the system is unresponsive, press **Alt + F4**. The screen will display an error message to help identify/troubleshoot connection issues. You can provide this information to Support to help them determine a course of action.

### Application Settings

1. From either the login or Environment Selection screen, press **F2** to access Application Settings. The following screen appears.



2. **Enterprise Web Service URL** – This is the address Field Work Center uses to locate the login and configuration information. The Enterprise Web Service is frequently specific to the client's installation, and is available upon completion of installation. When accessing Field Work Center for the first time, users will need to enter the designated URL (provided by their IT department) here.
3. **Trace Output** - Leave as defaulted; used by technical support.
4. **Show Detailed Trace Messages** – Leave as defaulted; used by technical support.
5. **Trace ACS Assemblies Only** – Leave as defaulted; used by technical support.
6. **Write Debug Output** - Leave as defaulted; used by technical support.
7. **Forced Offline Operation** – This option is only used in rare circumstances. Examples: user has an "air card" in the PC; user's data plan does not have unlimited data at no charge; the current connection is very poor.
8. Click **Save** to save the changes and return to the login screen. Click **Cancel** to discard the changes and return to the Login screen.

**Hot Keys:**

**Ctrl\_Shift\_R** = Refresh Local Data Store

**Ctrl +** = Expand All on Manage Resources

**Ctrl -** = Collapse All on Manage Resources

**Ctrl\_H** = History of a Particular Record

**Ctrl \_D** = Duplicate a Record

**Insert** = Create New Header Row

**Ctrl \_Insert** = Create Detail Row

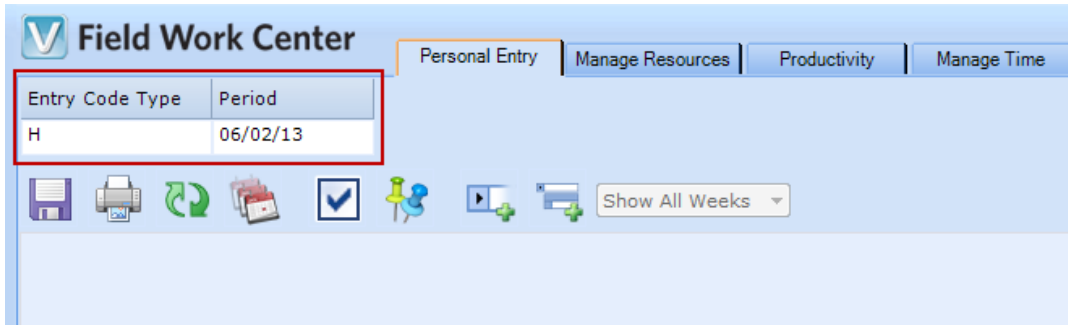
**Ctrl \_D** = Duplicate a Record


**F3** = Create or Edit a Note

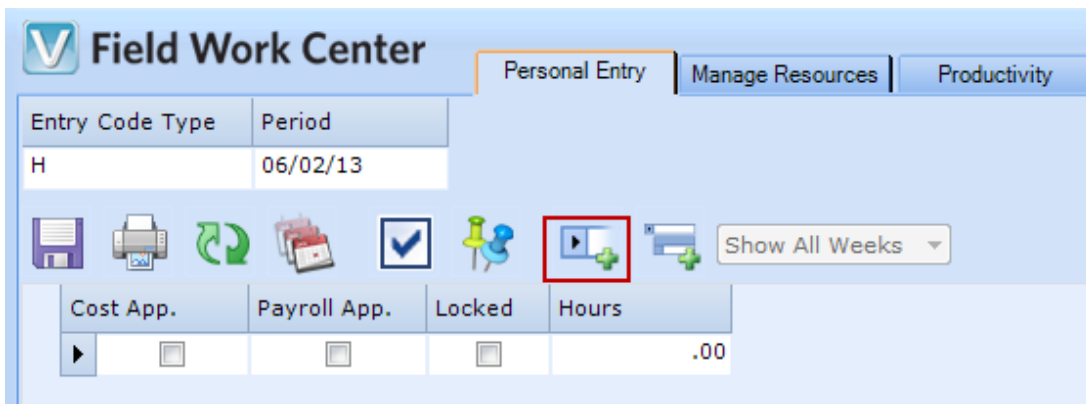
## Personal Entry


**NOTE:** The fields displayed on the time entry screen will depend on the configuration of your system. Therefore, some of the entry examples provided with this guide may not match exactly with the fields your company uses.

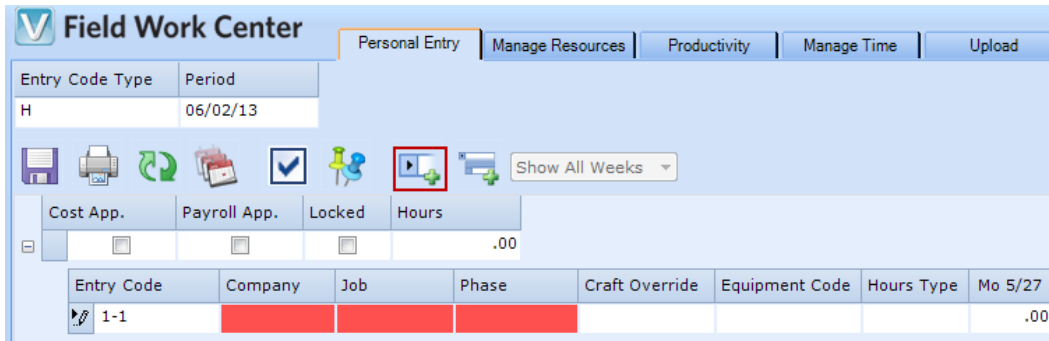
1. From the main screen of the Field Work Center, select the **Personal Entry** tab (first tab on left).




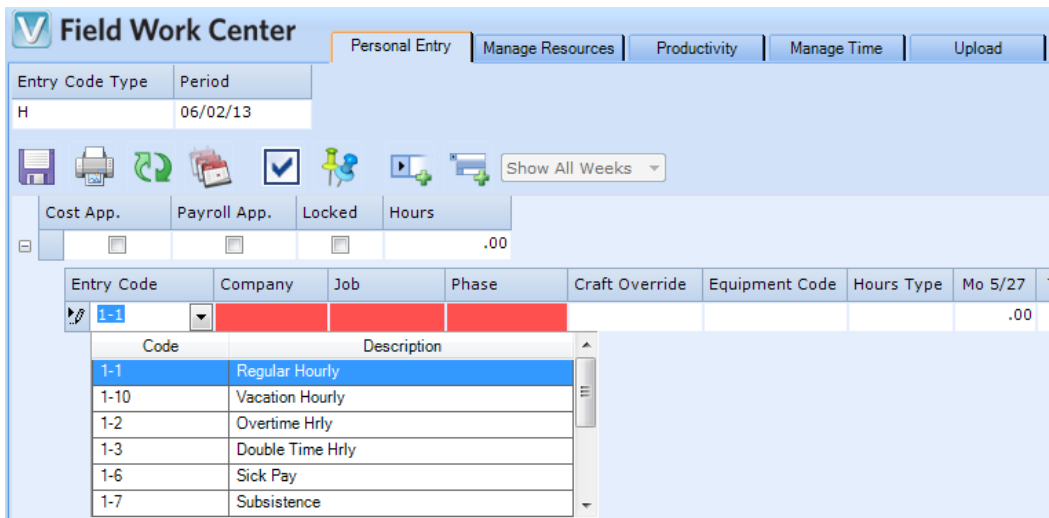
2. **Entry Code Type** – Select the Entry Code Type. The four types used most frequently within Field Work Center are: *Hours, Units, Currency, and Equipment*.
3. **Period** – Select the Period Ending Date for entering time. Then click on the **Refresh**  icon.



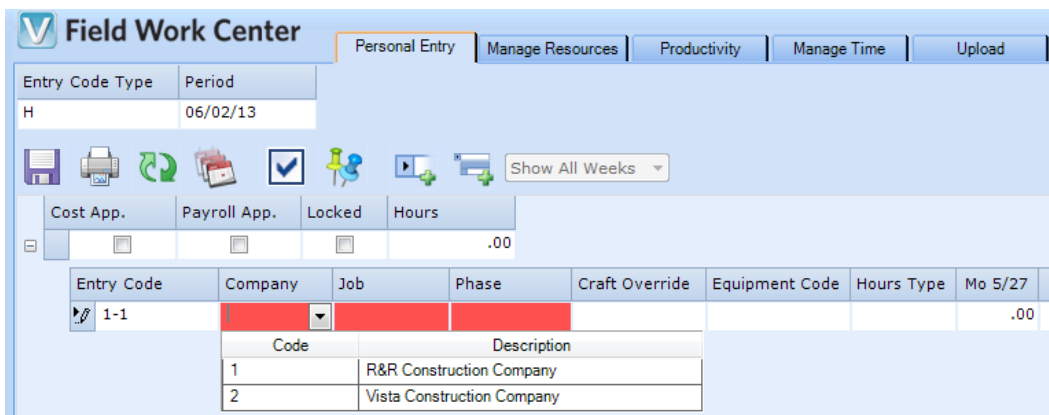
4. **Add Header** – If a new header is needed, click on the **Add Header**  icon. This will generate a new header record for a resource.



5. **Add Detail** - Click on the **Add Detail**  icon to create a time sheet. You can enter multiple time sheets for a period.



6. **Entry Code** - Click on the drop-down and select the entry code.



7. **Company** – Select the company for which you are entering the time sheet.

Field Work Center

Personal Entry | Manage Resources | Productivity | Manage Time | Upload

Entry Code Type: H | Period: 06/02/13

Cost App. | Payroll App. | Locked | Hours: .00

Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type	Mo 5/27
1-1	1	[Dropdown]					.00

Code	Description	Craft Template
1000-	First Avenue High School	105
1001-	Key Bank - Midland	
1014-	Good Will Store	
1015-	Lenscrafters	
1016-	Key Bank - Fort Worth	

8. **Job** – Select the Job for which you are entering time.

Field Work Center

Personal Entry | Manage Resources | Productivity | Manage Time | Upload | Reporting

Entry Code Type: H | Period: 06/02/13

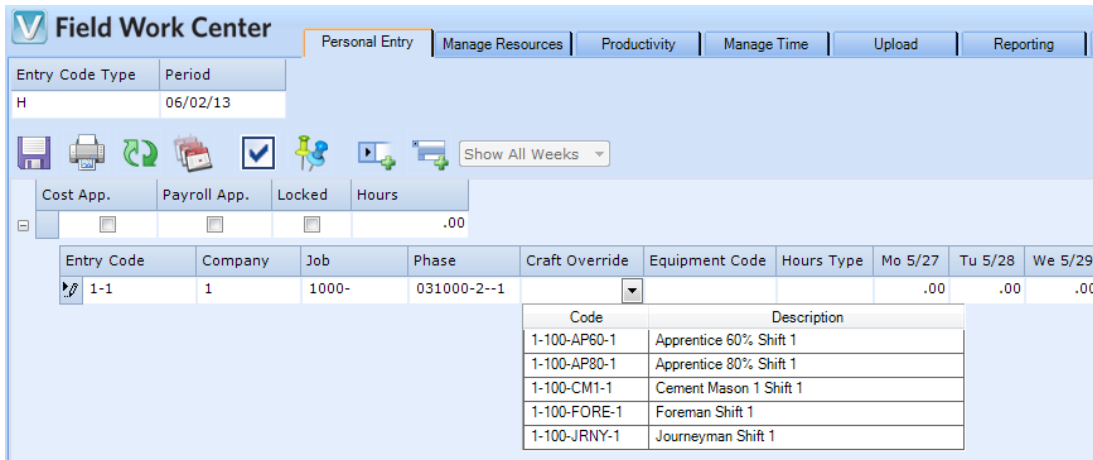
Cost App. | Payroll App. | Locked | Hours: .00

Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type	Mo 5/27	Tu 5/28	We 5/29
1-1	1	1000-	[Dropdown]				.00	.00	.00

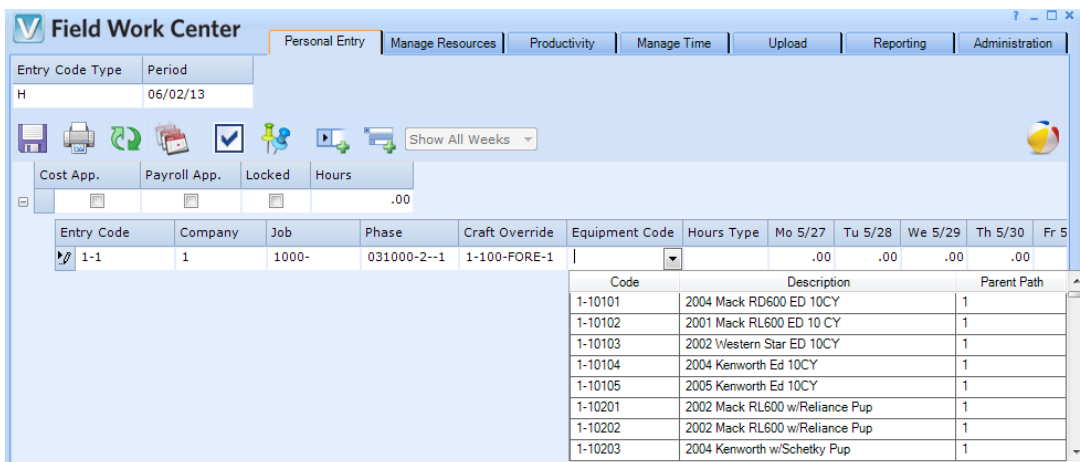
Code	Description	Unit of Measure
013100---1	Project Superintendent - Labor	MOS
015100---1	Temporary Electricity - Labor	LS
015136---1	Temporary Water - Labor	MOS
015213---1	Job Offices - Labor	LS
015219---1	Chemical Toilets - Labor	LS
031000-1--1	Pump Concrete - Labor	LS
031000-2--1	Fine Grade Continuous Footings - Labor	SA
031100---1	Form S.O.G.,Mass.Top'G & Steel - Labor	SF

9. **Phase** – Select the Phase code for the specified Job.

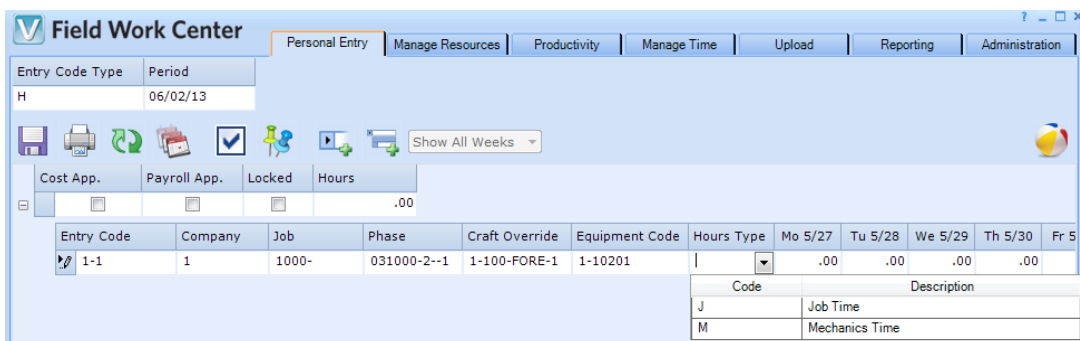
**TIP:** Pressing **F4** from many fields will display a quick lookup, allowing you to search for data by selected criteria (e.g. search for a phase by phase code, description, and/or job).



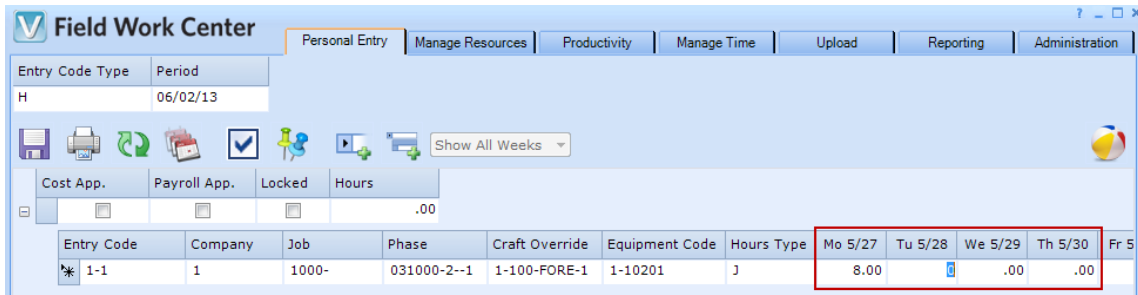
10. **Craft Override** – Select the Craft Override for which you are entering time.




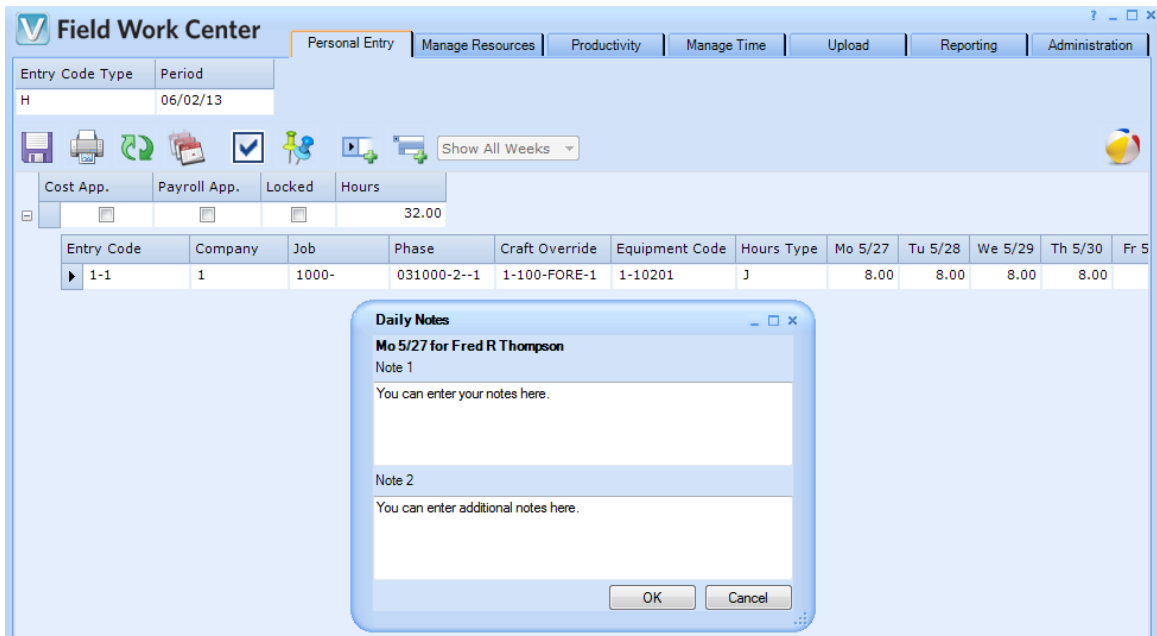
11. **Equipment Code** – Select the Equipment Code for which you are entering time.




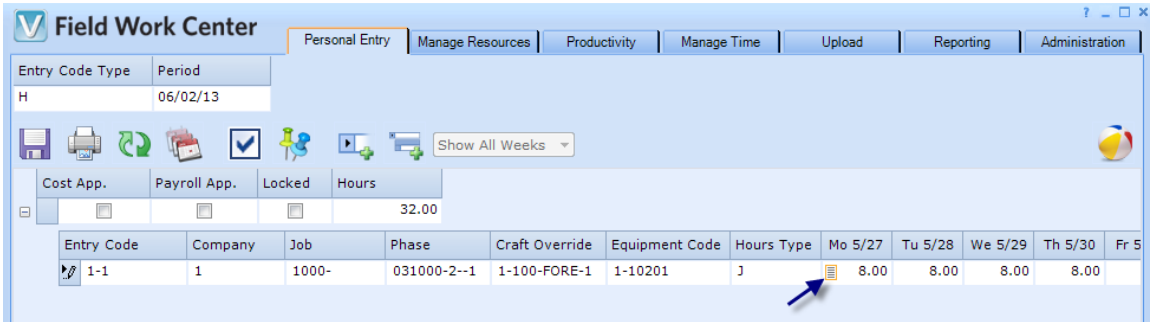
12. **Hours Type** – Select **J-Job Time** for hours worked on a job, or **M-Mechanics Time** for hours worked on equipment repair.



13. **Hours** – Enter the hours worked for each day.
14. After you have completed entering your time, click the **Save**  icon.

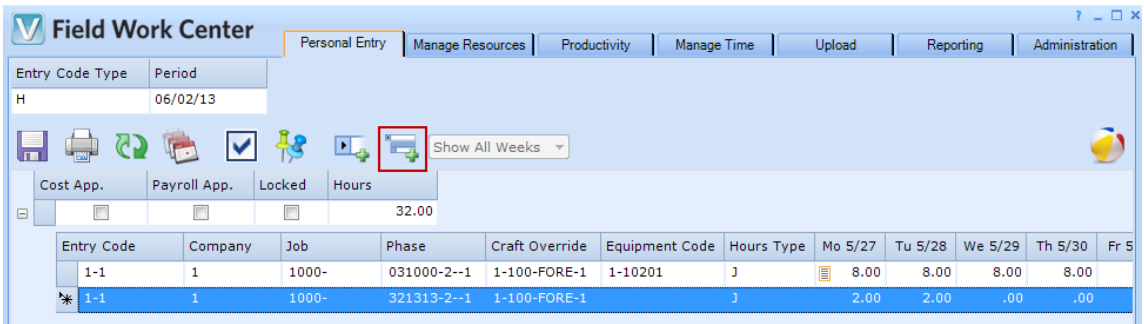


15. **Add a Note** – Highlight the date field and press the **F3 key**. The Daily Notes window displays.  
You can enter up to two notes. Once you have entered your notes, click the **OK** button and then click **Save** .

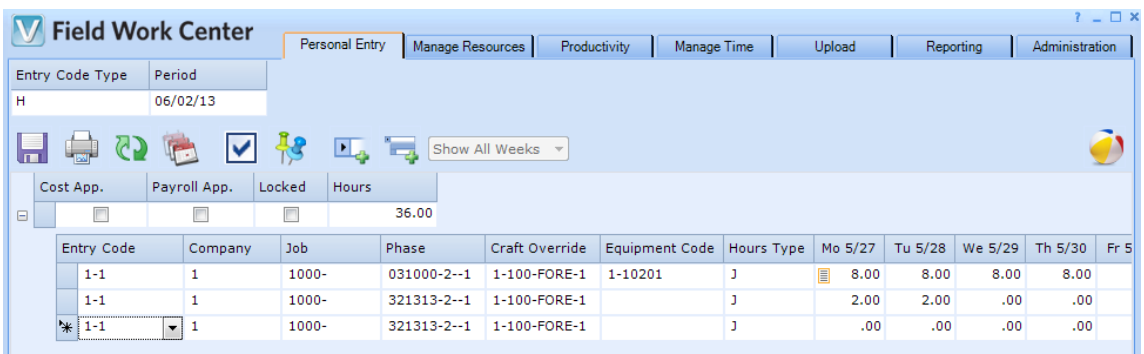


**NOTE:** When Daily Notes are available, a paper icon appears next to the hours. To retrieve the notes, highlight the field and press the **F3** key.

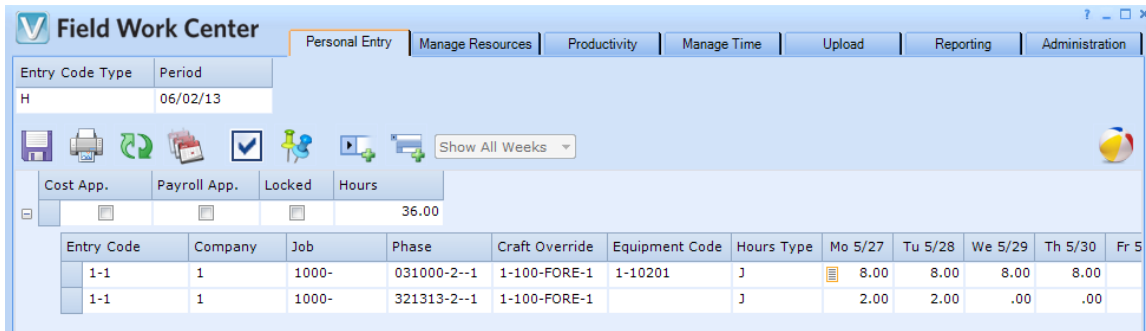
You may add to or edit the text in both **Daily Notes** fields. When you are finished, click **OK** and then **Save**. Click **Cancel** to exit Daily Notes without any changes.



- Add an Additional Line** - Click the **Add Detail** icon to create a new line. Then fill out all the time information and click **Save**.



- Duplicate a Line** – Highlight the **line** to duplicate and press **Ctrl D**. A new detail line will appear just below the copied line. Hours will not be copied to the new record. Enter hours as applicable and click **Save**.




- Delete a Header or Detail Record** – Highlight the row and press the **Delete** key. The row will be deleted. If you delete a header record, all associated detail records will also be deleted.

**NOTE:** If you delete a row in error and have **not** saved your changes, click **Refresh**. You will receive a message asking “Do you want to save your changes before continuing?”. Click **NO** to cancel changes; click **Yes** to save changes.

## Entering Currency

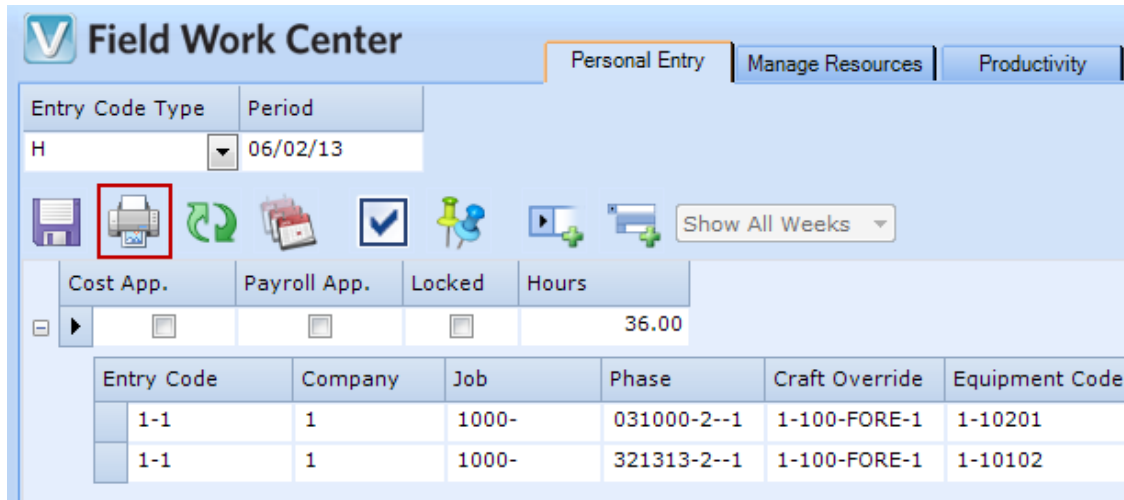
Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type	Mo 5/27	Tu 5/28	We 5/29	Th 5/30	Fr 5
1-7	1	1000-	321313-2--1	1-100-FORE-1			35.00	35.00	35.00	35.00	3


Example: Per Diem of \$35.00 is charged to job:

1. Click on the Personal Entry tab.
2. Select Currency as the Entry Code Type and select the Period.
3. Click on **Add Detail** .
4. Select the appropriate Earnings Code (e.g. Per Diem) and then enter the Company, Job, Phase, Craft Override, and Equipment Code if applicable.
5. Enter the amounts for each day. Then click **Save**.

## Print Screen / Suggestion Features

Using the Print feature will allow you to print the current screen.

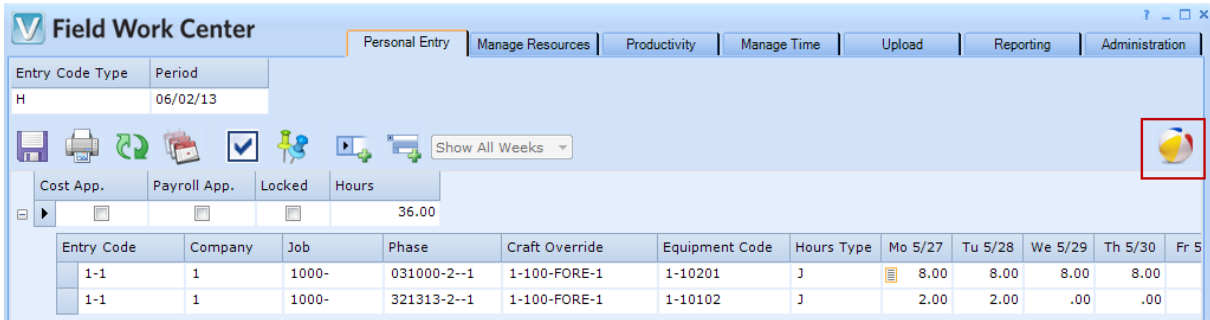


1. Click the **Print**  icon to display the print preview window.

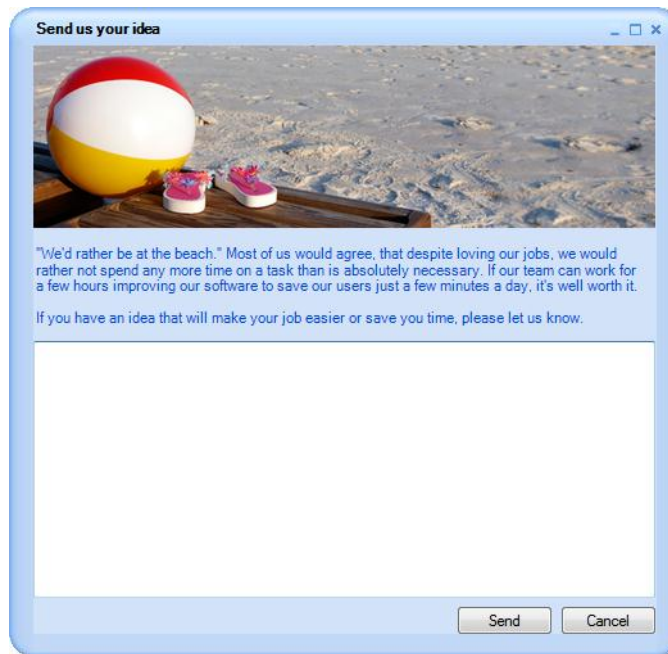
**Distributions for Period 06/02/13**

Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type	Mo 5/27	Tu 5/28	We 5/29	Th 5/30	Fr 5/31	Hours	Upload Date	Batch
1-1	1	1000-	031000-2--1	1-100-FORE-1	1-10201	J	8.00	8.00	8.00	8.00	.00	32.00		
1-1	1	1000-	321313-2--1	1-100-FORE-1	1-10102	J	2.00	2.00	.00	.00	.00	4.00		

The print preview will be titled “Distributions for Period (date)”. Options are available to print, magnify, and change the page format.



1. **Beach Ball** – Click on this icon to open a text box titled “Send us your idea”. Use this text box to send up suggestions for software enhancements and process changes. This text box is not intended for reporting basic support issues.



2. When finished, click Send. Click Cancel to exit the text box without sending.  
Suggestions will be sent via email to the development staff. In addition to the suggestion text, the email will automatically include your name, company name, and the version of Field Work Center being used.

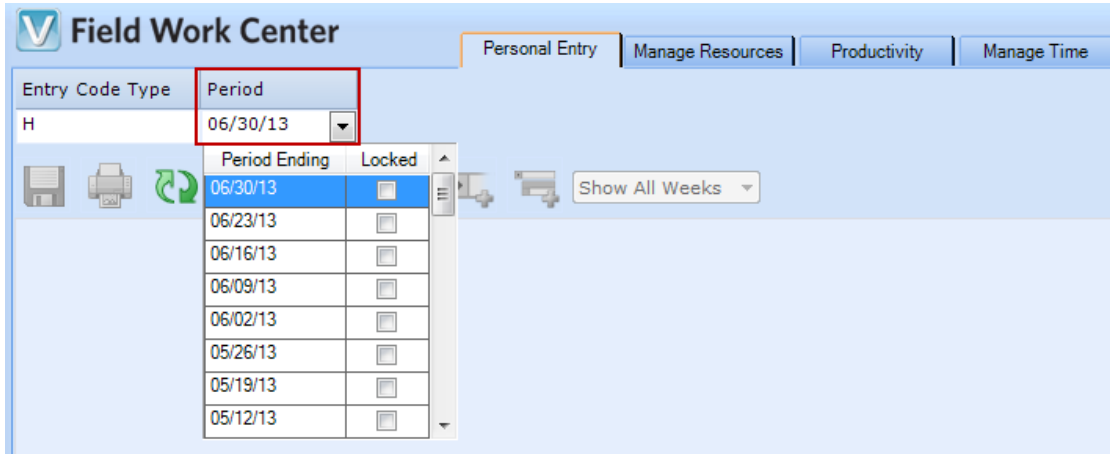
**NOTE:** Email is sent using a default email; it is not sent from your email address.

**At this point, select someone from the class and have them enter time.**

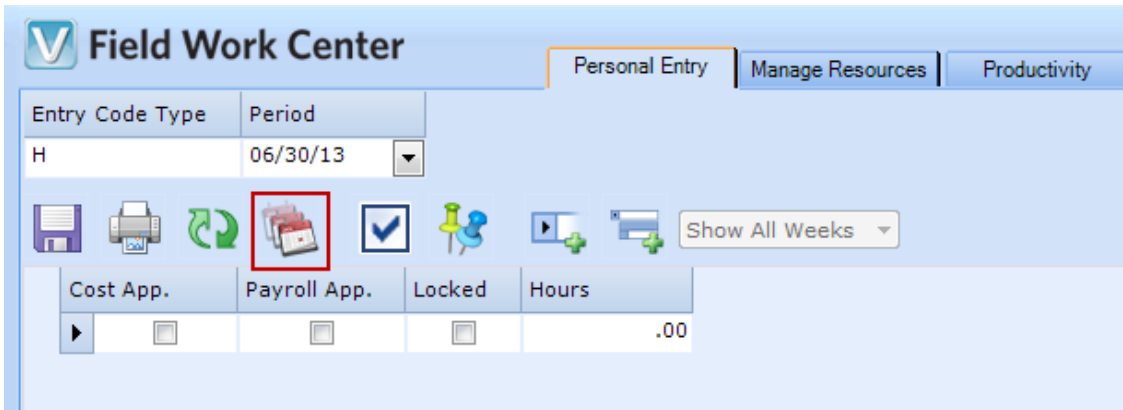
Select an employee and enter time.

- a. Regular Earnings
- b. Overtime Earnings
- c. Multiple Job
- d. Duplicate a Line
- e. Add Notes for one or two days
- f. Delete a Line
- g. Currency
- h. Save
- i. Beach Ball

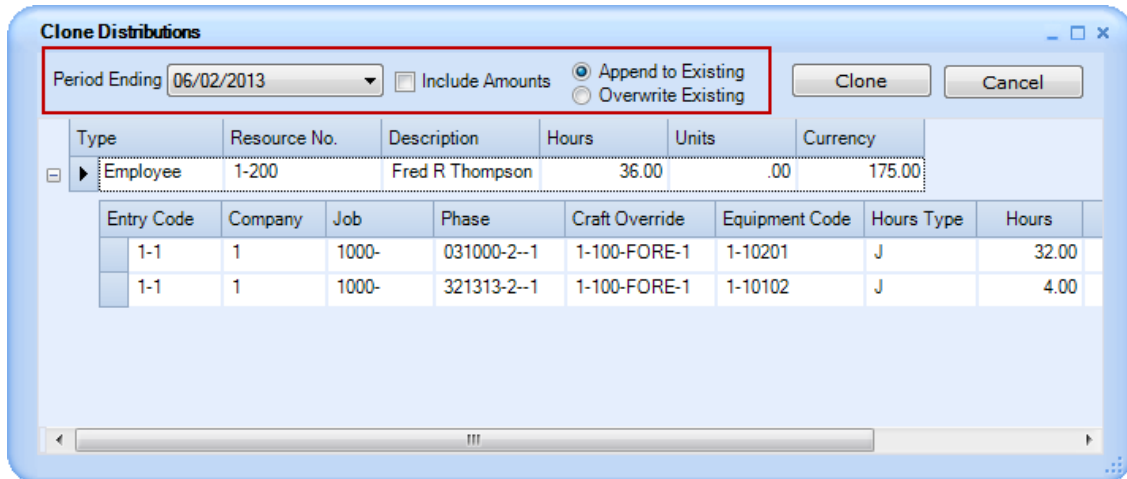
### Cloning an Existing Timesheet



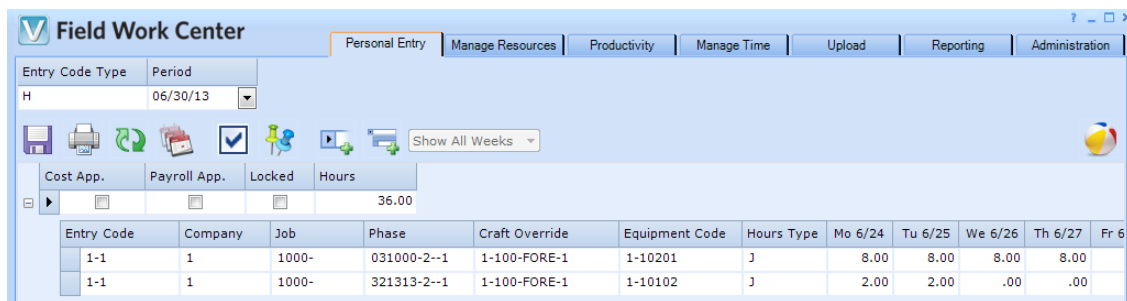
1. **Period** - Select a new date from the **Period** drop-down and click **Refresh** .



2. **Clone** – Click the **Clone** icon. Icon will be grayed out until you click **Refresh**.



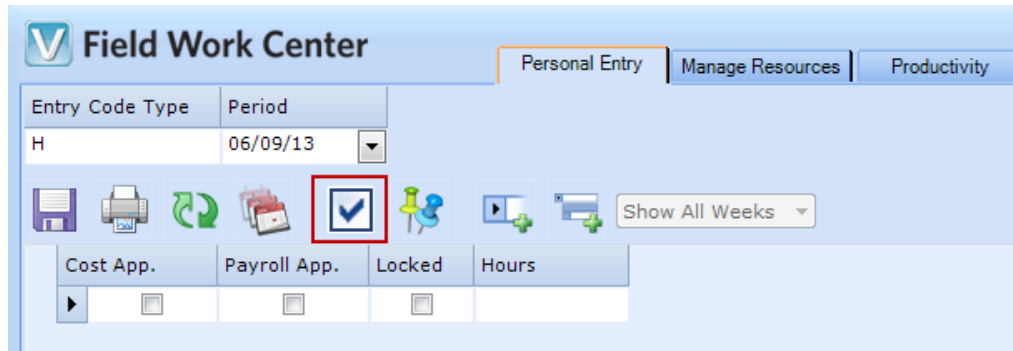
3. **Period Ending** - Select the Period Ending that you want to clone.
4. **Include Amounts** – Check this box if you want hours and currency to be cloned; otherwise, the amounts will come over as 0.
5. **Append to Existing** – Select this option if you want to append the selected entries to an existing period.
6. **Overwrite Existing** – If you have existing entries in the specified period, selecting this option will overwrite the existing data.
7. Once you have completed your selections, click the **Clone** button. Then click Save to preserve any changes made.



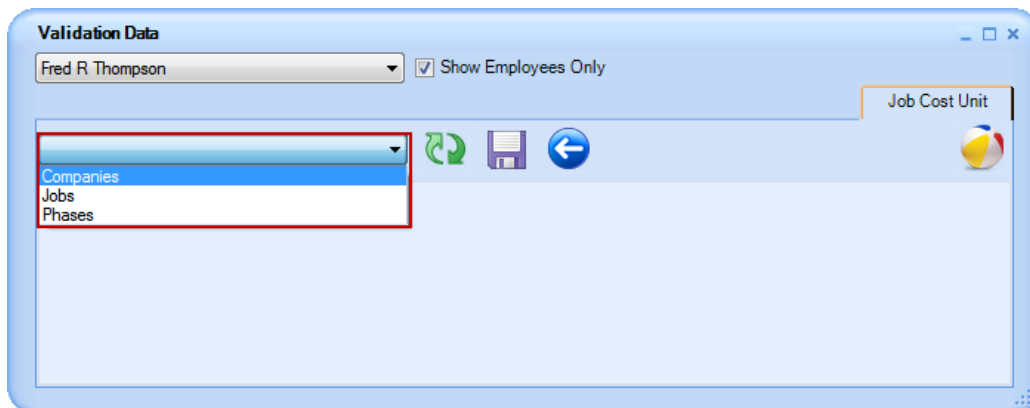
**Note:** The cloning process cannot be reversed; there is no Undo option available.

## Validation

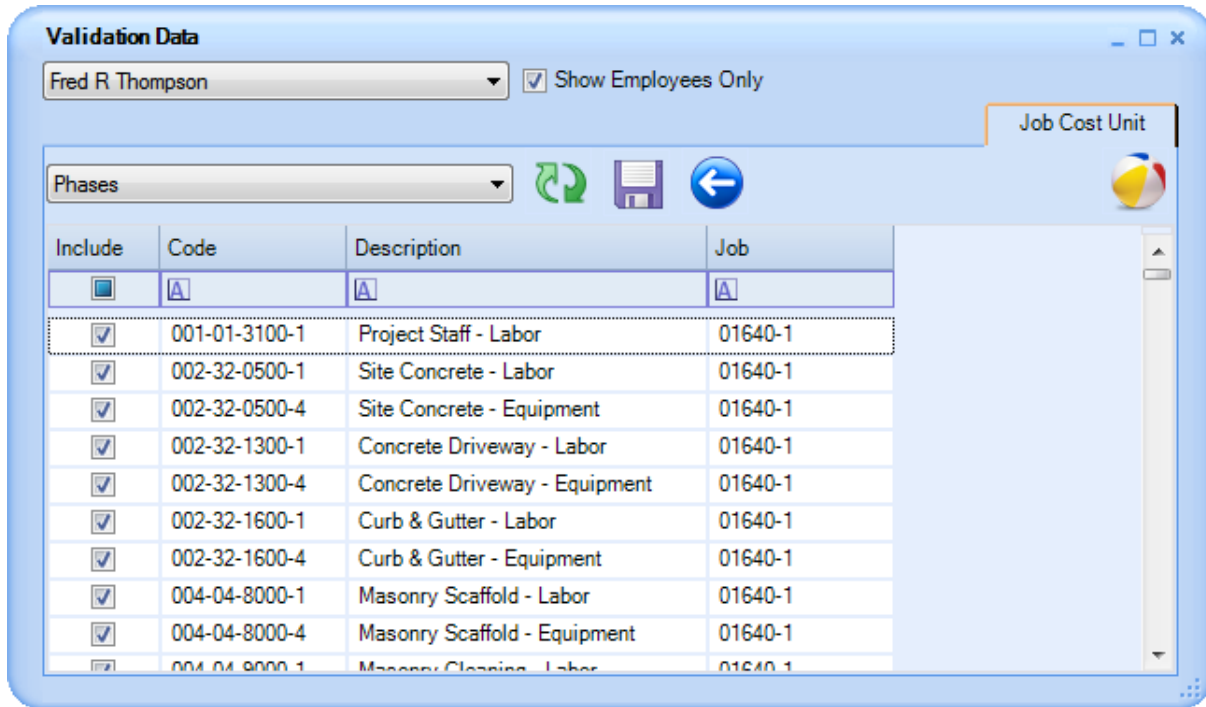
Validation allows the selection of Companies, Jobs, Phases/Cost Code to be available in your drop-down menus.




1. Click the **Validation Data Setup**  icon. The Validation Data window appears.



2. From the drop-down list, select Companies, Jobs, or Phases. The screen will display a list of options based on the validation option you selected.

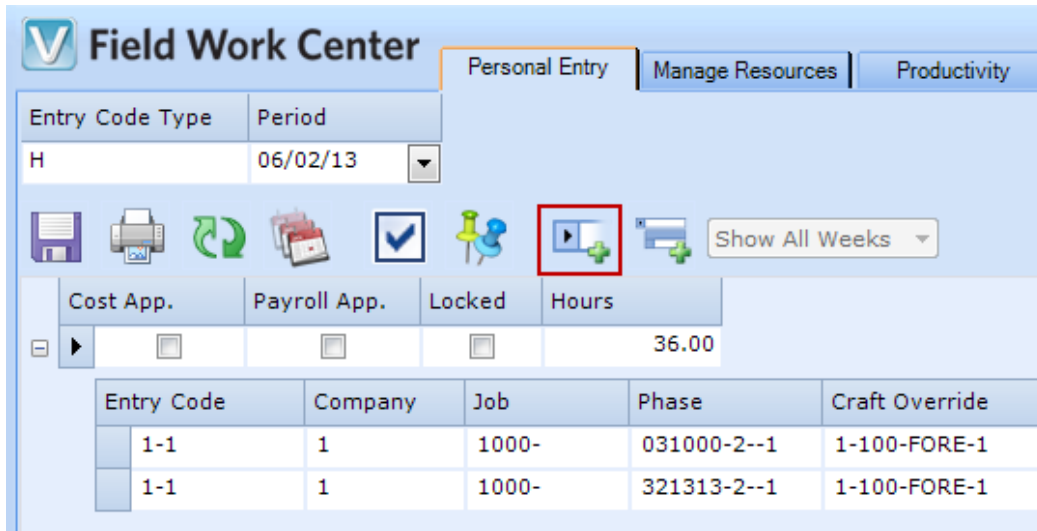




3. Select the companies, jobs, or phases that should be available from the drop-down list in the related field (e.g. jobs that are available from the Job drop-down menu).
4. Click **Save** .

**NOTES:**

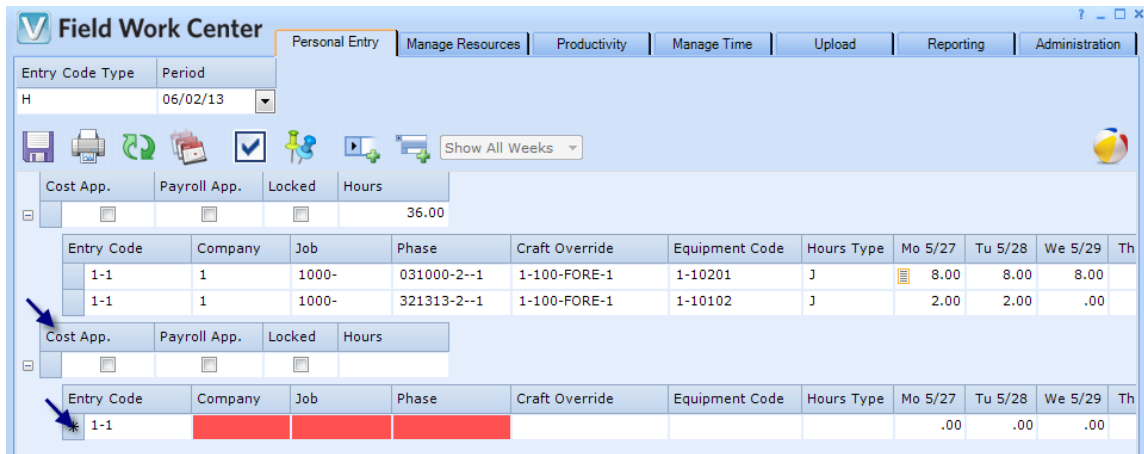
- When selecting Jobs validation data, if a job is closed in Viewpoint, it will not display on the Jobs list.
- Your role may not have the permissions to use this feature.


## Adding Header and Detail Records



1. **Add Additional Header** – Select the Period and click **Refresh** .
2. Click on the **Add Header**  icon. This will create an additional header record for the existing period (as shown below).

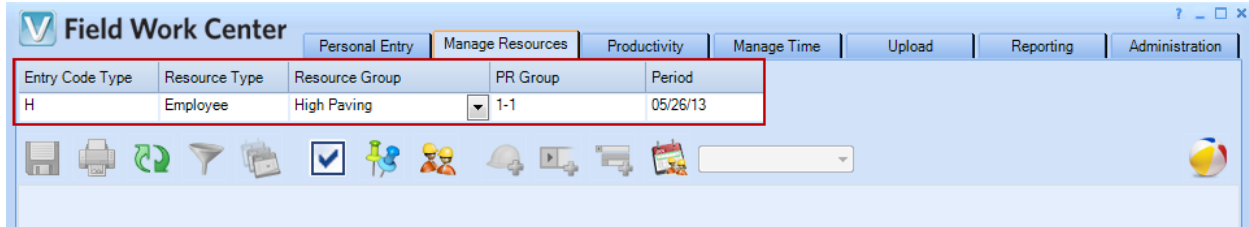
Example: A period could have been uploaded to Viewpoint and you will need to add additional hours for the resource for the period.




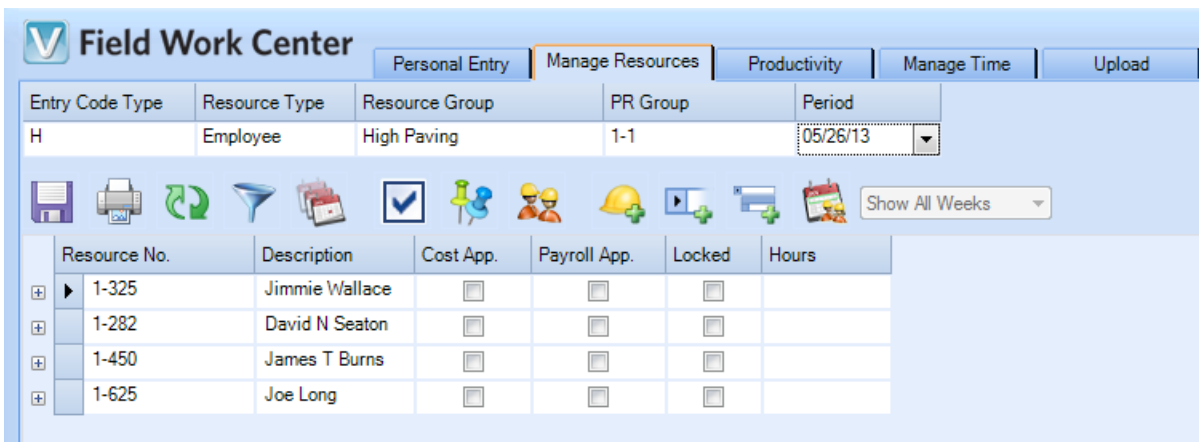
3. **Add Detail Records** – Select the new header and click **Add Detail** . A new detail record will be added below the new header.


## Manage Resources

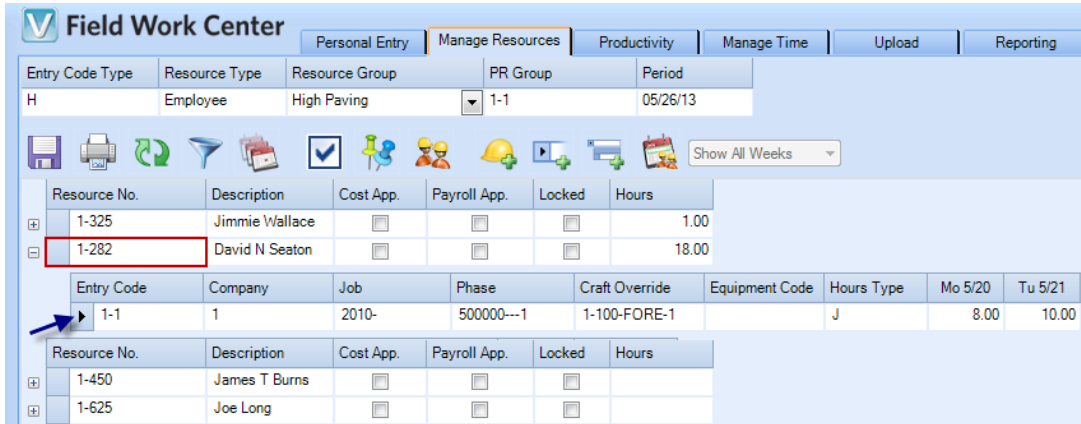
Resource Groups allow you to enter time for a Group/Crew at one time. (Time collector of hours), it creates a distributions header for each employee of the group.



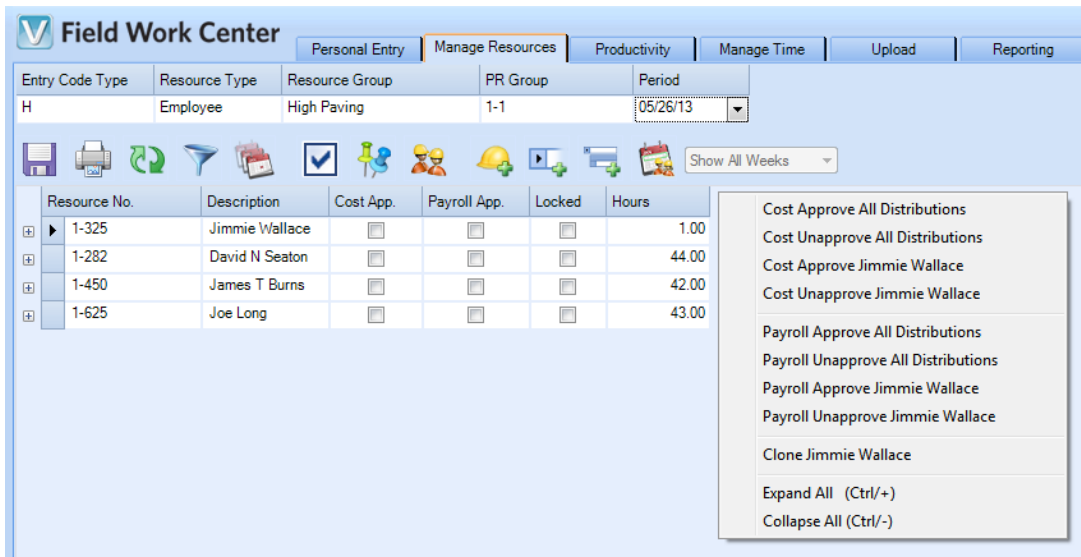
1. **Earn Code Type** – Select the earn code type for the distribution record. The four types used most frequently within Field Work Center are: *Hours, Units, Equipment, and Other*.
2. **Resource Type** – Select the Resource Type (Employee or Equipment).
3. **Resource Group** – Select the Resource Group (Name or Group/Crew).
4. **PR Group** – Select the PR Group.
5. **Period** – Select the Period.
6. Once you have completed your selections, click on the Refresh  icon. The list of Resources for the Group selected will display.



- To enter time for each resource, select the resource and clicking **Add Detail** . The detail line will be added below the resource.



- Enter distribution and time for each resource, adding as many detail lines as necessary for each earn code type.



- Once you have entered the time, right click anywhere on the screen. A menu displays the following options:

- Cost Approve/Unapprove All Distributions
- Cost Approve/Unapprove a selected resource
- Payroll Approve/Unapprove All Distributions
- Payroll Approve/Unapprove a selected resource
- Clone a selected Resource
- Expand all (**Ctrl +**)
- Collapse All (**Ctrl -**)

**Field Work Center** | Personal Entry | **Manage Resources** | Productivity | Manage Time | Upload

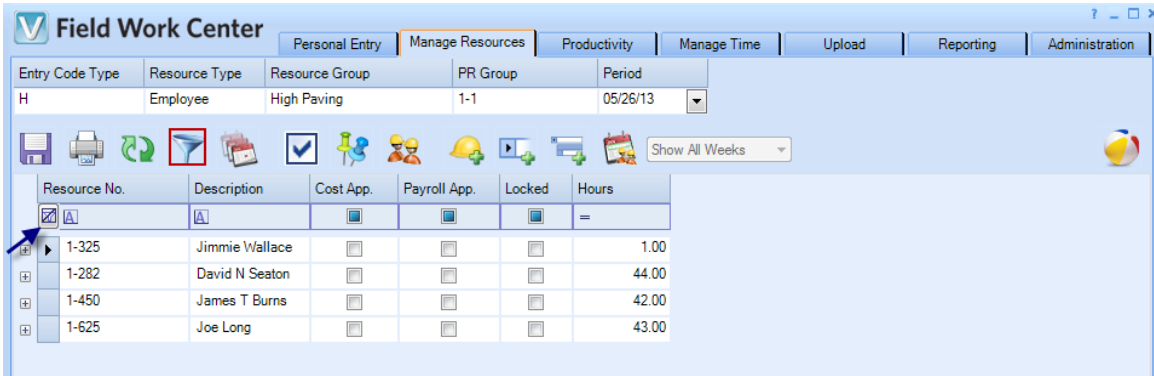
Entry Code Type	Resource Type	Resource Group	PR Group	Period
H	Employee	High Paving	1-1	05/26/13


Show All Weeks

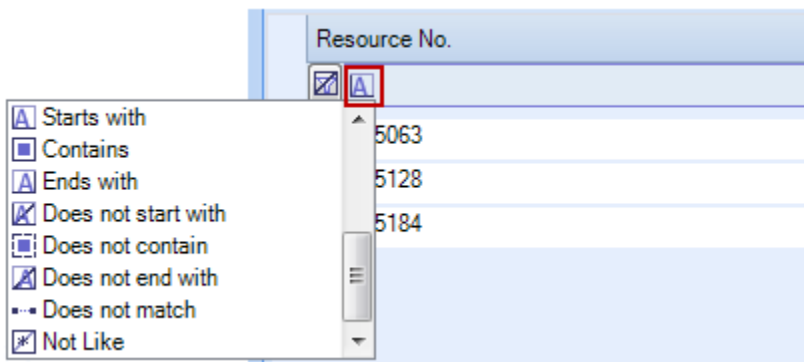
Resource No.	Description	Cost App.	Payroll App.	Locked	Hours	
1-325	Jimmie Wallace	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1.00	
Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type
1-1	1	2010-	500000---1	1-100-FORE-1		
Resource No.	Description	Cost App.	Payroll App.	Locked	Hours	
1-282	David N Seaton	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	44.00	
Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type
1-1	1	2010-	500000---1	1-100-FORE-1		J
Resource No.	Description	Cost App.	Payroll App.	Locked	Hours	
1-450	James T Burns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	42.00	
Entry Code	Company	Job	Phase	Craft Override	Equipment Code	Hours Type
1-1	1	2010-	500000---1	1-1-CPBRG-1		M

**NOTE:** Expand all (Ctrl/+) allows you to view, edit and delete time collected.

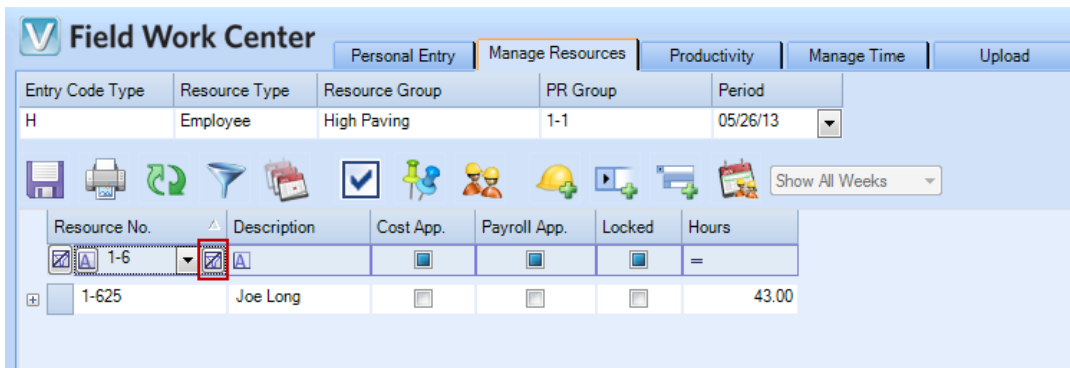
### Filter Row




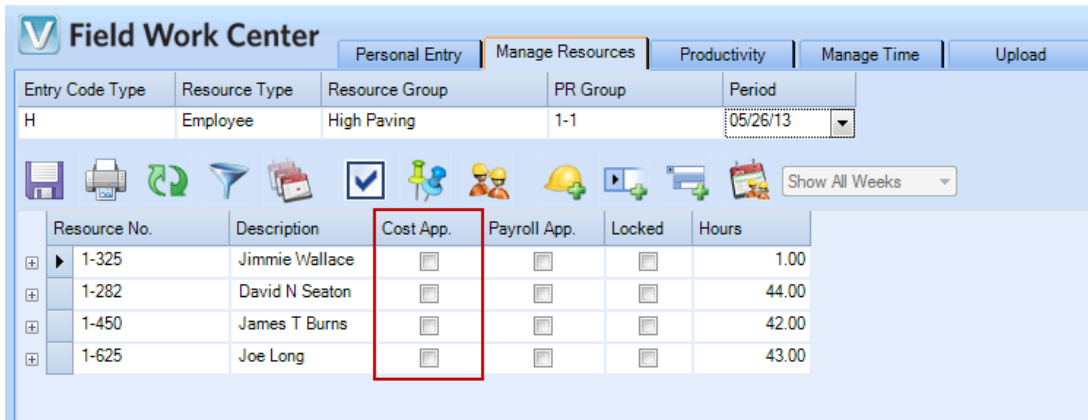
1. Click the **Show Filter Row**  icon to display Sort & Filter Row options. The **Show Filter Row** icon is also available on the Personal Entry tab.




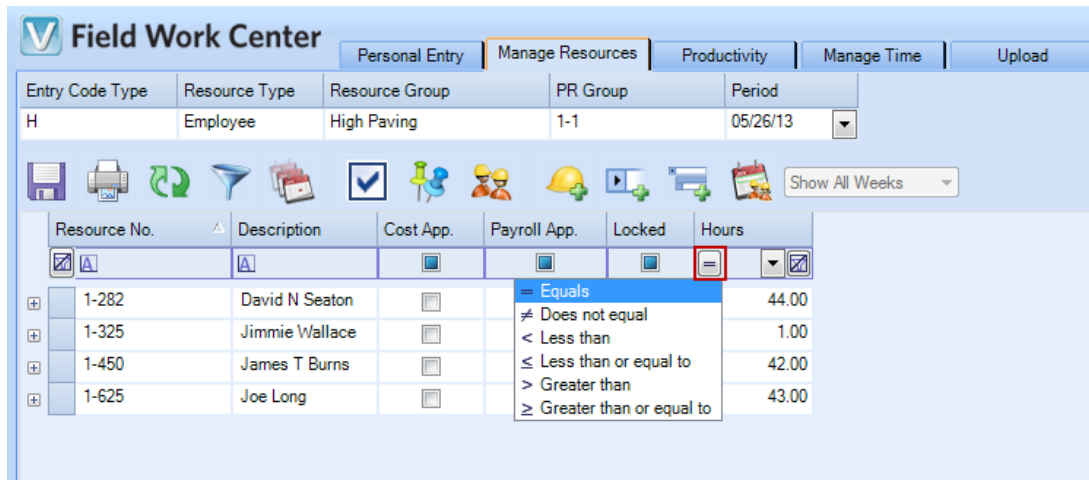
2. Click on the  icon to display a list of available filter options.




3. Click on the  icon to clear the filter criteria for a Resource.



4. Manager can approve and lock the resource time by clicking the  icon.



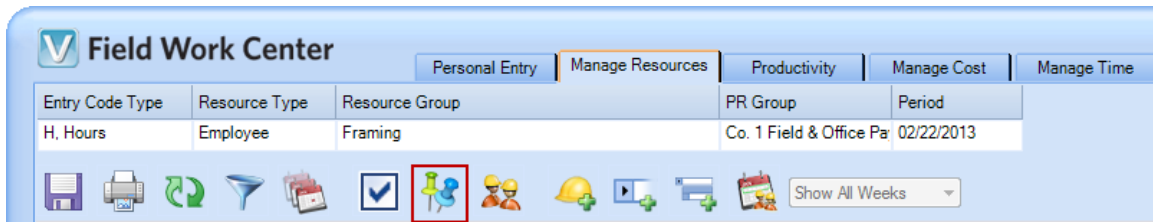
5. Click the  icon to display a list of available filtering options.


**At this point select someone from the class and have them enter time**

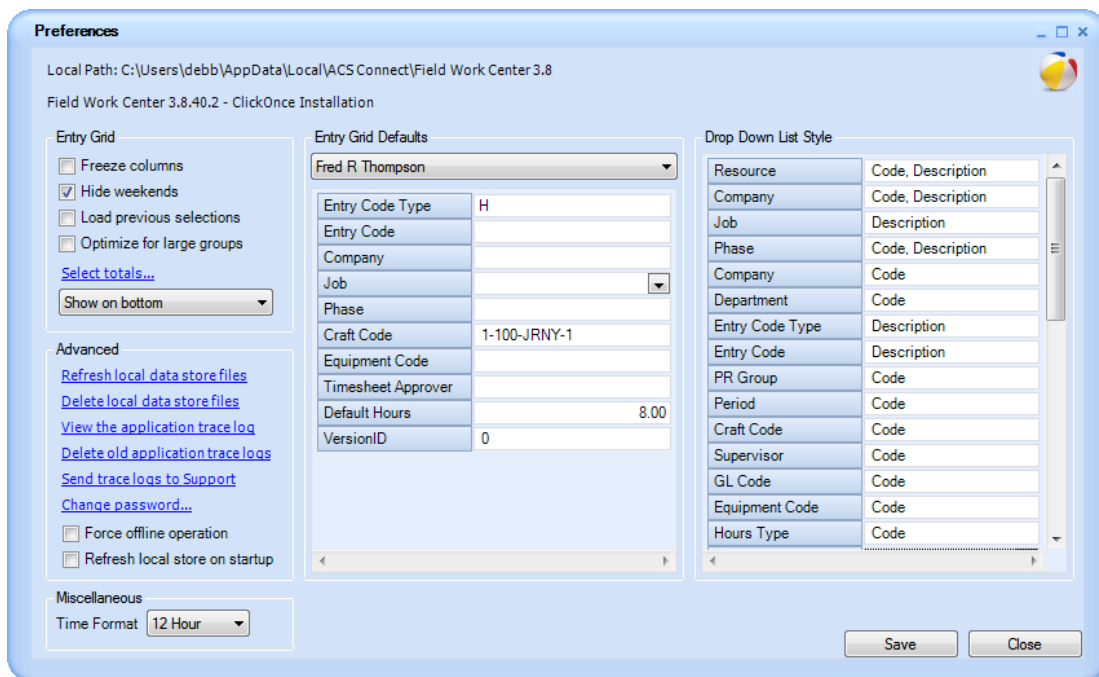
Select an employee to enter time in Manage Resources.

- a. Select a Crew to enter time.
- b. Enter time for Regular and Overtime Earnings.
- c. Multiple Job.
- d. Duplicate a line.
- e. Add notes on a day or two.
- f. Delete a line.
- g. Filter on the hour row.
- h. Expand and Collapse Resources time entered.

## Preferences



1. Click on the Preferences icon  to access the Preferences window. This option allows users to select a variety of personal preference entries.



Local Path: C:\Users\debb\AppData\Local\ACS Connect\Field Work Center 3.8  
Field Work Center 3.8.40.2 - ClickOnce Installation

2. **Local Path** – The path where local data is stored.
3. **Field Work Center** – The current version installed.

Drop Down List Style

Resource	Code, Description
Company	Code, Description
Job	Description
Phase	Code, Description
Company	Code
Department	Code
Entry Code Type	Description
Entry Code	Description
PR Group	Code
Period	Code
Craft Code	Code
Supervisor	Code
GL Code	Code
Equipment Code	Code
Hours Type	Code

**Drop Down List Style**

Use this section to indicate whether to display organizational information using code values or descriptions. This optional configuration allows you to choose how the data is displayed on the entry grid. You can expose just the code if that gives you enough information, or the code and description. You can also select to show the description followed by the code.

Entry Grid Defaults

Fred R Thompson

Entry Code Type	H
Entry Code	
Company	
Job	
Phase	
Craft Code	1-100-JRNY-1
Equipment Code	
Timesheet Approver	
Default Hours	8.00
VersionID	0

**Entry Grid Defaults**

Use this section to select default values by Resource. Each of the fields may be left blank or assigned a default value from the drop-down list for each Resource. For example, if you know that the "Regular" pay type will be used virtually all of the time, selecting it as the default from the dropdown on this screen will prevent the user from having to select it every time.

Entry Grid

Freeze columns

Hide weekends

Load previous selections

Optimize for large groups

[Select totals...](#)

Show on bottom ▼

**Freeze columns** – Determines whether the columns containing organizational information are fixed when scrolling horizontally on the Personal Entry or Manage Resources tabs.

**Hide Weekends** – If checked, the entry screen will only display weekdays.

**Load Previous Selections** – If checked, the last selections are automatically loaded upon entering a tab.

**Optimize for large groups** - Detail record dropdowns are not initially populated when this option is checked. However, they will be initialized once you select a

header record. When you select a different header record (or its associated detail records), the system clears the dropdowns associated with the previous header record and initializes the dropdowns associated with the current header record. This keeps memory usage to a minimum. However, the disadvantage is that no matter what list style has been selected for the company, the cell only shows the code (the underlying base value) until the lists are initialized. This is because there is no underlying list until its initialized, so at that point, it's just a cell showing the underlying text value (the code itself).

**Select totals** – This option allows you to select the totals you want displayed on the screen. Use the dropdown to specify whether to show the total at the top or bottom of the screen, or both.

Advanced

[Refresh local data store files](#)

[Delete local data store files](#)

[View the application trace log](#)

[Delete old application trace logs](#)

[Send trace logs to Support](#)

[Change password...](#)

Force offline operation

Refresh local store on startup

**Refresh local data store files, Delete local data store files, View the application trace log, Delete old application trace logs, and Send trace logs to Support** – These selections should only be used with your Support Team.

**Force offline operation** – Used if the employee is using an Air Card or wants to refresh manually. No information will be synchronized with the server if this option is checked.

**Refresh local store on startup** – When you log into Mobile Field Manager, the workstation will refresh with the server. This option should be checked.

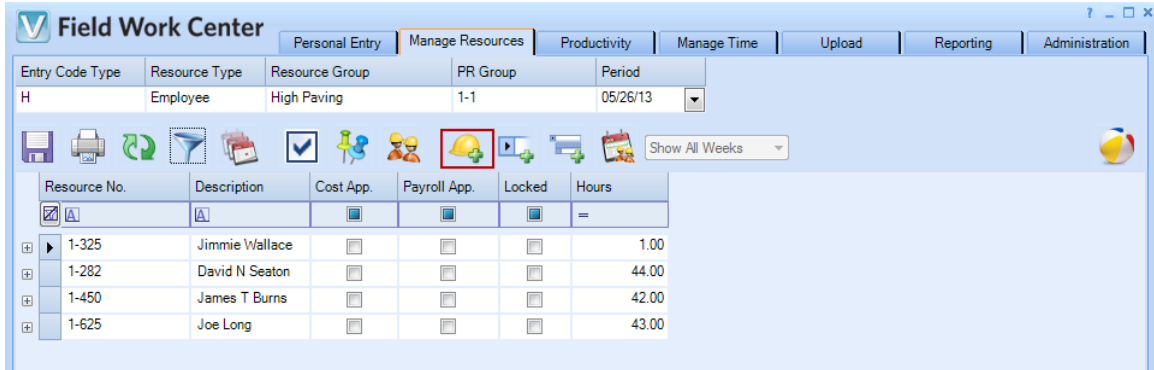
Miscellaneous



Time Format 12 Hour ▼

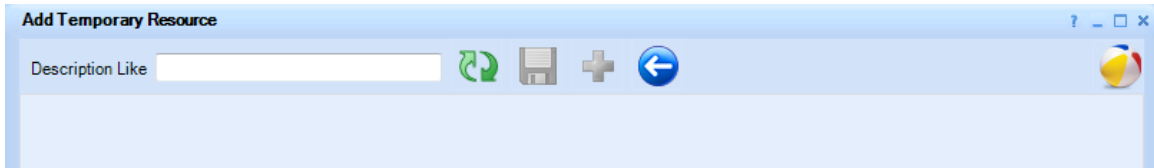
**Time Format** – Allows you to specify whether to use the 12-hour or 24-hour format. **Only available for clients that have time clocks.**

### Walk-On/Temporary Resources (Non-Employees)

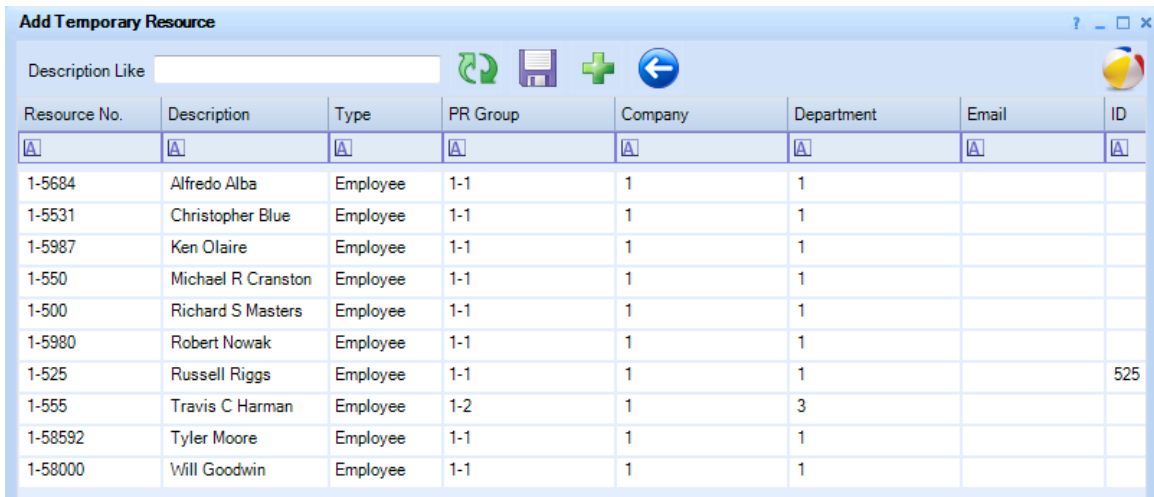
When someone is hired in the field and a new employee number has not been created in the accounting system, you can set up a temporary employee number to track their time. (You can also create a group with all the temporary employees.)



1. **Add a Resource** – Select the Resource Group and Period and click **Refresh** . Then click **Add Resource** .



2. Click **Refresh** .



3. Click **Add** .

Add Temporary Resource


Description Like

Resource No.	Description	Type	PR Group	Company	Department	Email	ID	Exempt	Temporary	Photo
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
1-5684	Alfredo Alba	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-5531	Christopher Blue	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-5987	Ken Olaire	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-550	Michael R Cranston	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-500	Richard S Masters	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-5980	Robert Nowak	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-555	Travis C Harman	Employee	1-2	1	3			<input type="checkbox"/>	<input type="checkbox"/>	View
1-58592	Tyler Moore	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-58000	Will Goodwin	Employee	1-1	1	1			<input type="checkbox"/>	<input type="checkbox"/>	View
1-525	Russell Riggs	Employee	1-1	1	1		525	<input type="checkbox"/>	<input type="checkbox"/>	View
		Unknown						<input type="checkbox"/>	<input checked="" type="checkbox"/>	View

4. Enter the following information:

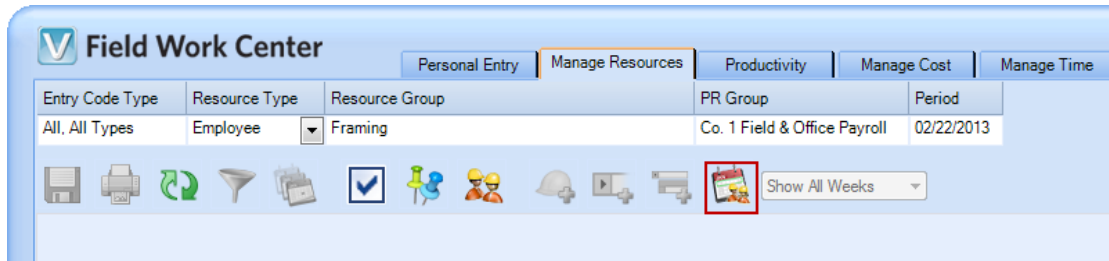
- a. Resource Number
- b. Description (Name – Last, First)
- c. Type
- d. PR Group
- e. Company
- f. Department
- g. Email


**NOTE:** The system automatically checks the **Temporary** box for each resource you add.

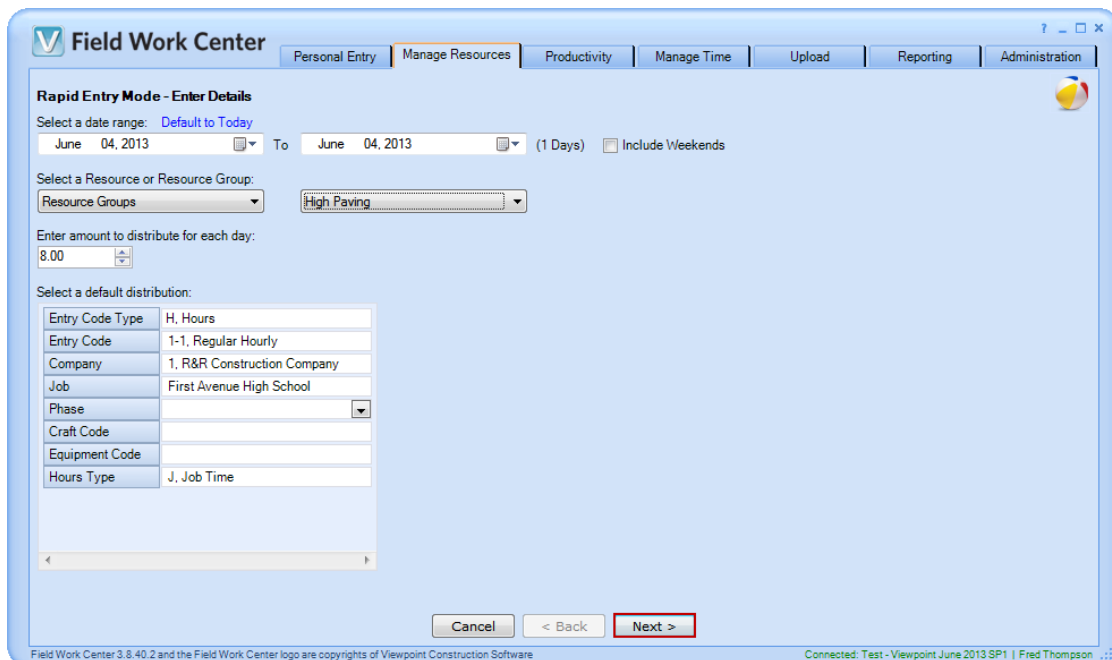
5. Once you have completed entering all of the information, click **Save** .

## Rapid Entry Wizard

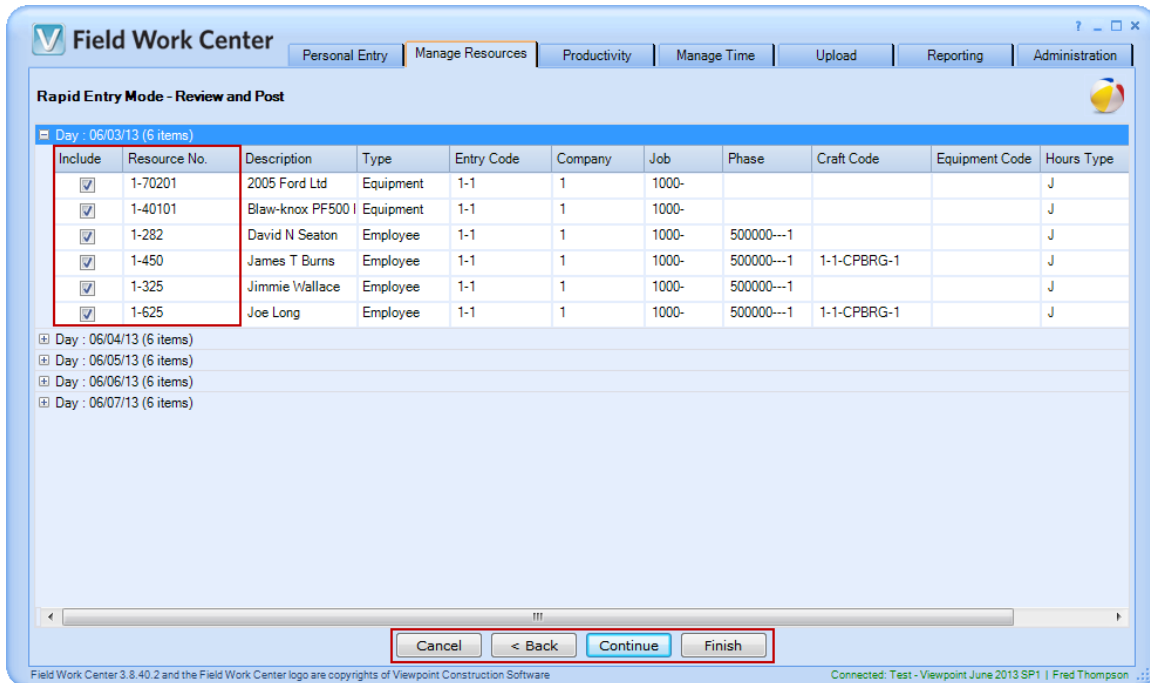
This option allows data to be entered in a single step for a Resource or a Resource group.



1. **Rapid Entry Wizard** – Click on the Rapid Entry Wizard  icon.

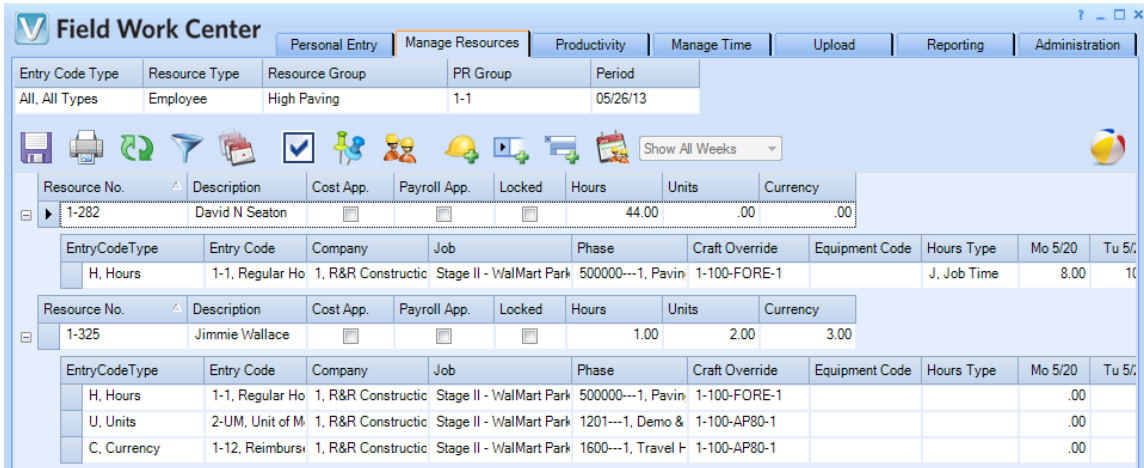



2. **Date** - Select the date range.
3. **Include Weekends** – If left blank (unchecked), the weekends will be ignored.
4. **Select a Resource or Resource Group** – Using the drop-down menus, select a resource type (Resources or Resource Group) and then a resource or resource group.
5. **Enter amount to distribute for each day** – Enter the hours.
6. **Select a default distribution** – Select the default Entry Code Type, Entry Code, Company, Job, Phase, Craft Code, Equipment Code, and/or Hours Type.
7. After all selections have been made, click **Next** to continue. Click **Cancel** to exit without saving changes.



The list of Resources for the group with the selected fields will generate.

1. **Include** – Defaults as checked; uncheck to exclude the resource in the period recorded.
2. You have the option to make changes to any of the following as applicable: Earnings Code, Company, Job, Phase, Craft Code, Equipment Code, and/or Amount.
3. **Cancel** – Click to cancel the current selection.
4. **Back** – Click to go back to the previous screen.
5. **Continue** – Click to add a new rapid entry.
6. **Finish** – Click to complete the entry and return to the Manage Resource screen.



7. Expand all (Ctrl +) and make any additional corrections if needed.
8. Click **Save** .

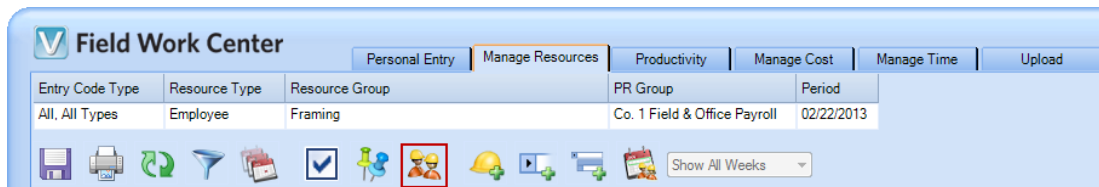
**At this point select someone from the class and have them enter time.**


- a. Preferences – make some changes to the current Resources.
- b. Create a Temporary/Walk on employee.
- c. Use the Rapid Entry Wizard.
- d. Make some changes to the Resources.
- e. Duplicate a line.
- f. Delete a line.

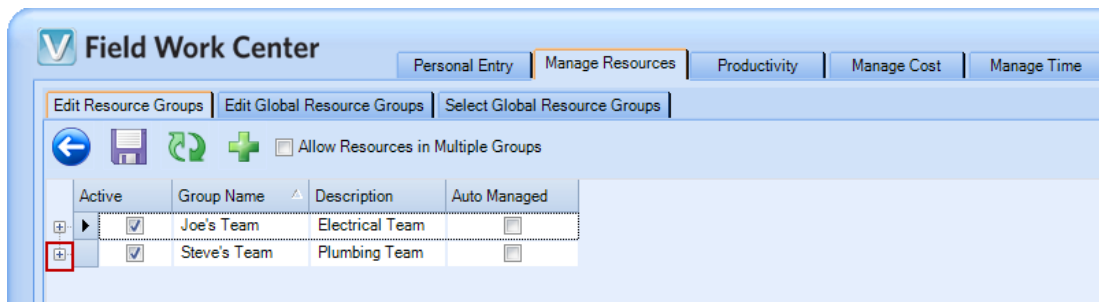
## Resource Groups

The Resource Group Setup option allows the login user to create their personal resource group, which cannot be accessed by other users.

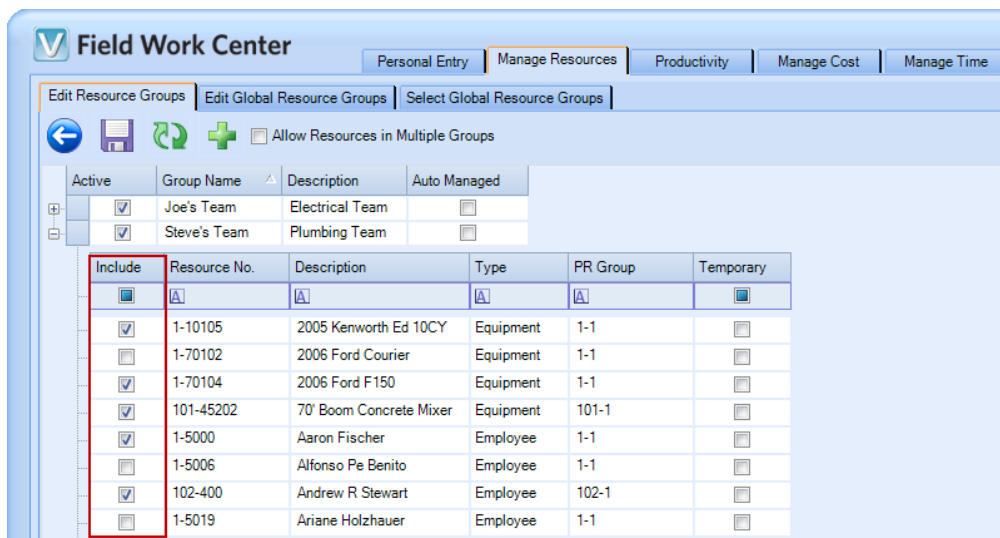
### Manage an Existing Resource Group



1. **Resource Group Setup** – Click on the **Resource Group Setup**  icon.

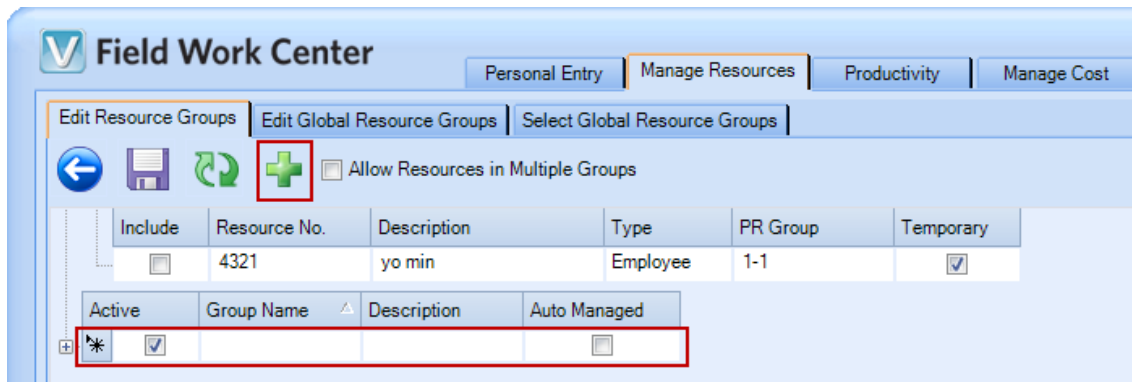



2. Select the **Edit Resources Group** tab. The screen displays a list of Resources Groups. Click on the plus + icon to expand the list of resources for the selected Resource Group.

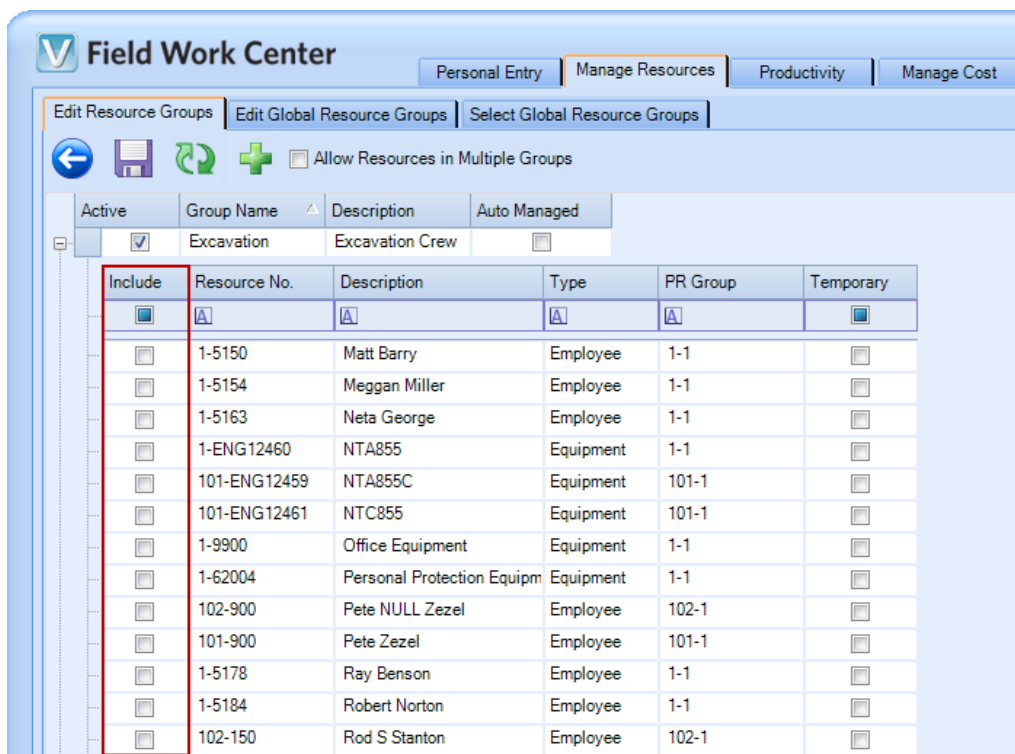


3. From the list of Resources, select the Resources that you would like to add to the group.
4. Use the **Filter Row** for a quick selection of Resources. Then click **Save**.

**Add a New Resource Group**



5. **Add a New Resource Group** – Click on the **Add**  icon.
6. Enter the Group Name and Description. Then click **Save**.



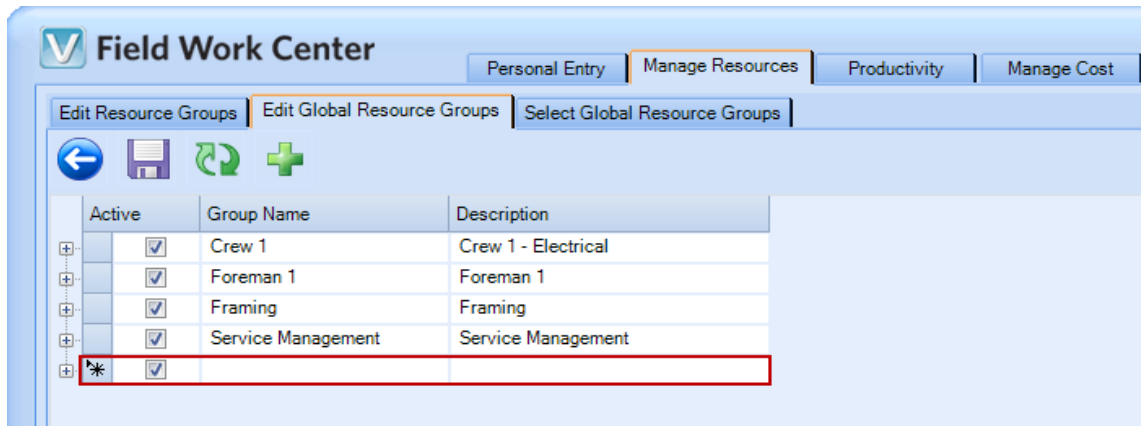
7. Check the **Include** box for each Resource you are adding to the group. Then click **Save**.



**NOTE:** Check the **Allow Resources in Multiple Groups** box if you are sharing Resources between your own groups; this is not very common.

## Edit Global Resource Group

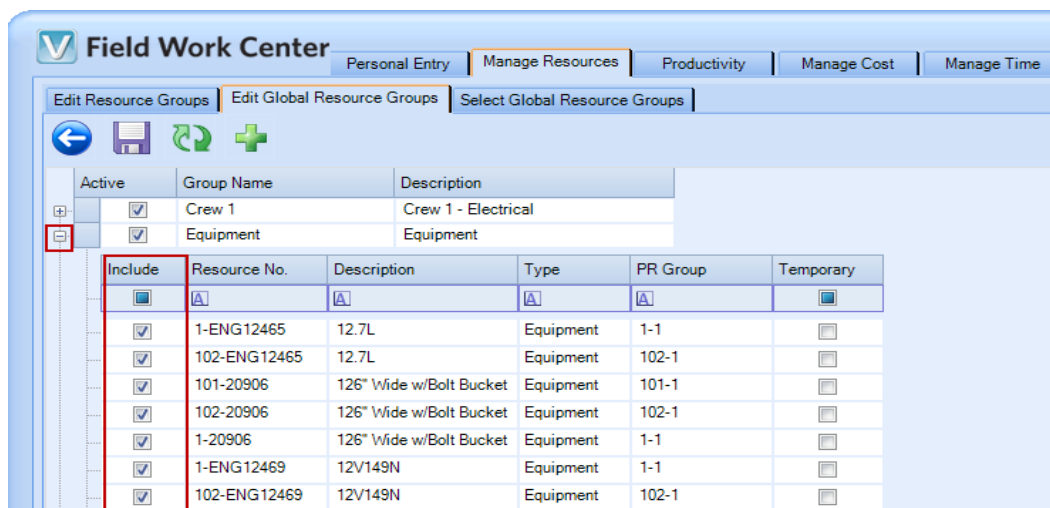
Use this tab to add, modify, and delete existing global groups. This task is done by the System Administrators.

### Add Global Resource Group



1. Select the **Edit Global Resources Group** tab.
2. Click on the **Add**  icon. A blank Group Name and Description row will be added to the bottom of the list.
3. Enter the new Group Name and Description and click the **Save**  icon.

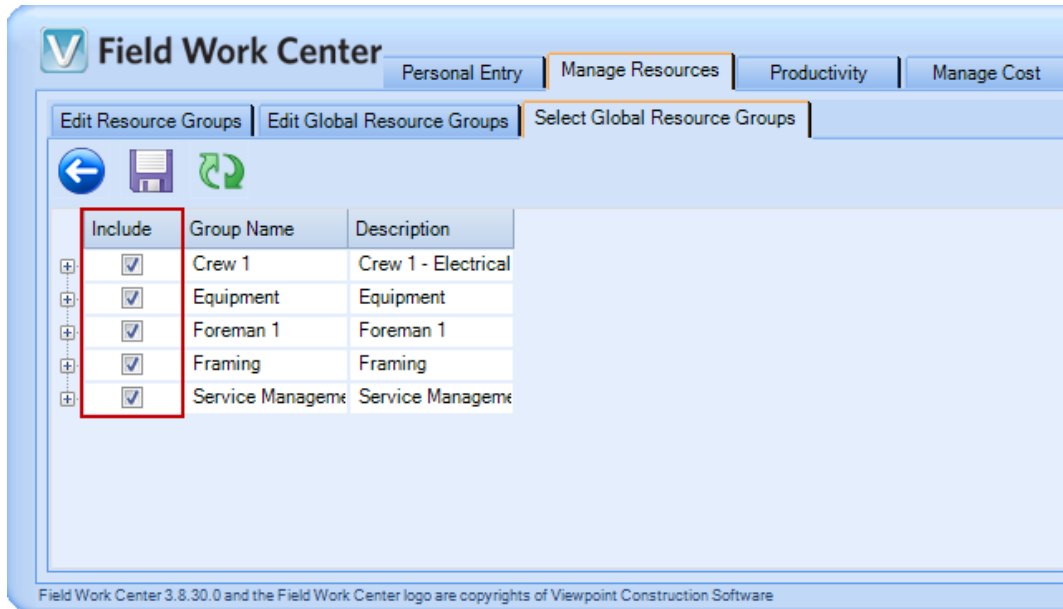
### Select Resources for a Global Resource Group



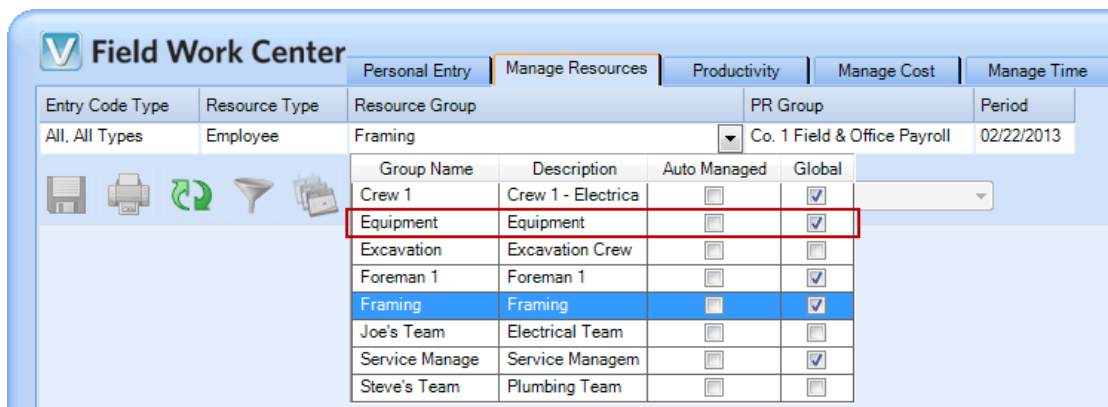
1. Click on the plus **+** icon next to the new Global Resource Group to expand the list of Resources.
2. Check the **Include** box for each Resource to add to the group. Then click **Save**.

## Select Global Resource Group

Use this tab to select Global Resources Groups for the Resource Group drop-down lists. This task is done by the System Administrators.

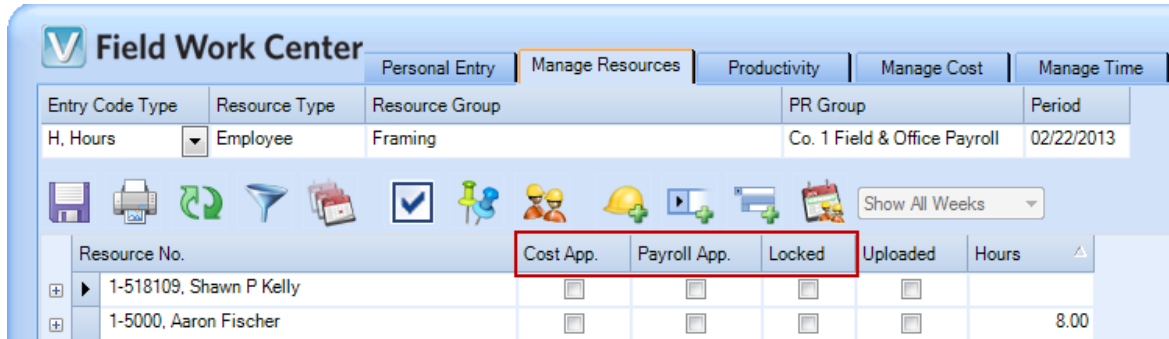


1. Click on the **Select Global Resources Group** tab.
2. Check the **Include** box for all the Global Resources Groups that you want to see on your Resource Group drop-down list.
3. Click **Save**.
4. Click on the **Return** icon to return to the main screen.



Note that the new Global Group is now available.

## Header Approval/Rejection/Lock for a Current Period

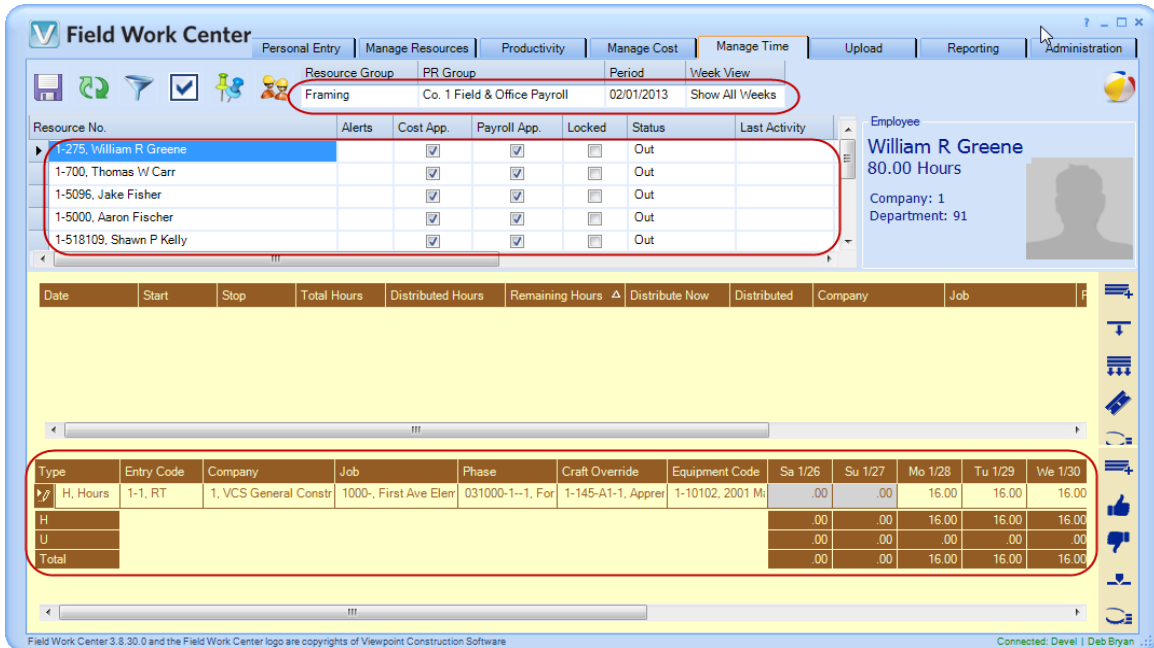


The **Cost App**, **Payroll App**, and **Locked** checkboxes are available on both the Personal Entry and Manage Resources tabs. These fields allow the time approver to approve and lock a timesheet. These fields are configurable, and your environment may contain all, some, or none of these fields.

## Manage Time










**NOTE:** You will only need to cover this portion of the class if the client is using the Time Clock feature. If it not being used, skip to the Reporting section (page 49).

This tab is used to collect and distribute time from time clocks, and is where time from time clocks is collected and distributed. Point out the three sections of the screen.

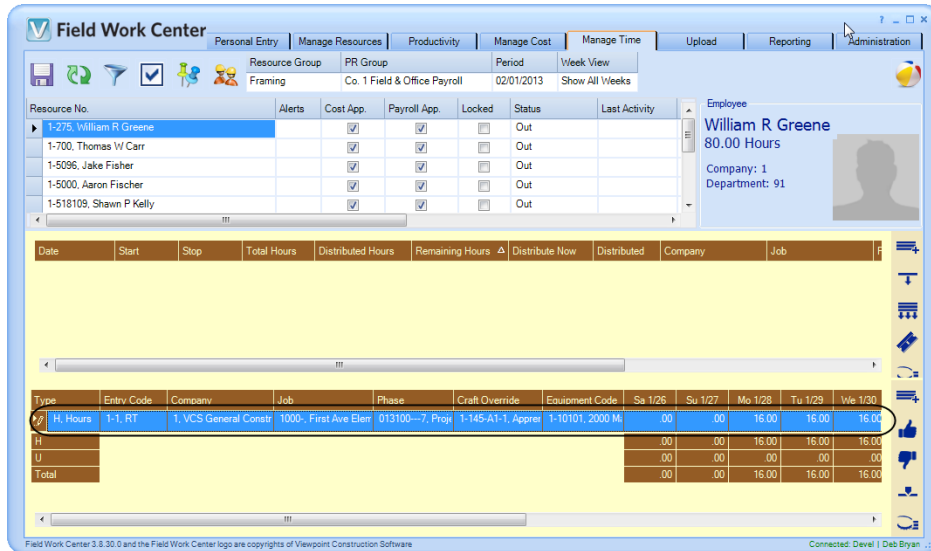


1. Select the Resource Group, PR Group, and Period.
  2. The upper grid displays all resources assigned to the group, along with Alerts, Approvals, Locked, Status, Last Activity, and Hours.
- NOTE:** The **Regular**, **Premium**, and **Other** columns (to the right of the Date fields) are defined in the **Earnings Code configuration** on the Administration tab.
3. The center grid shows past and present time punches for the selected resource.
  4. The bottom grid shows all distributed time records for the selected resource.

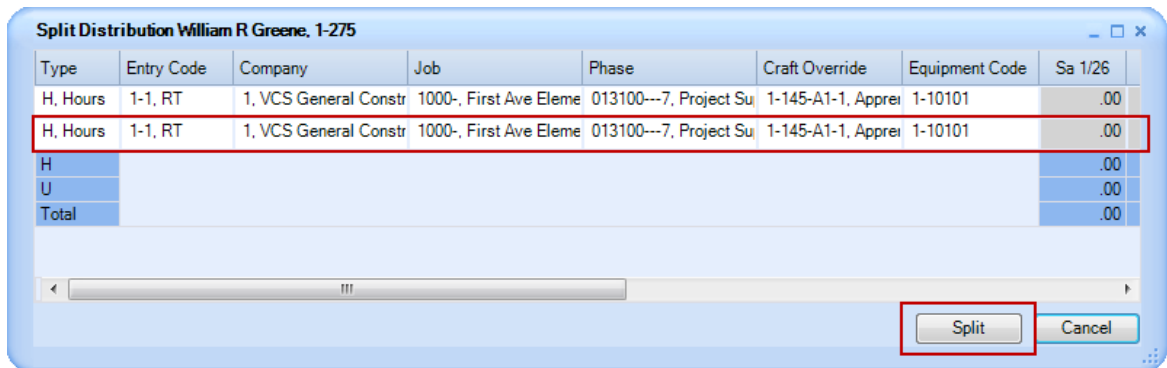
**NOTE:** Corrections can be made to any of the records in this section.

- |   |   |   |
|---|---|---|
|  Add new time record |  Distribute selected row |  Distribute all rows   |
|  Trim row            |  Show distributed rows   |  Hide distributed rows |
|  Approve all         |  Reject all              |  Split detail row      |

### Split Distribution



1. Select the record to split and click the **Split Detail Row** icon. A new record will display under the current record.



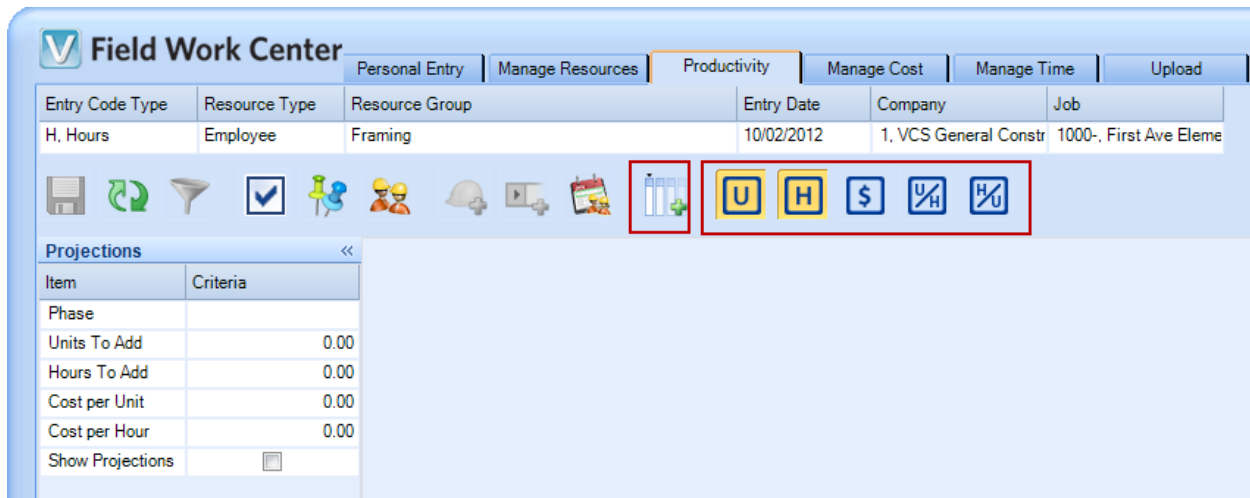
2. Update the information as applicable. The hours for the original entry will be adjusted once you enter the time for the new entry.
3. Click the **Split** button.







**At this point select someone from the class and have them:**

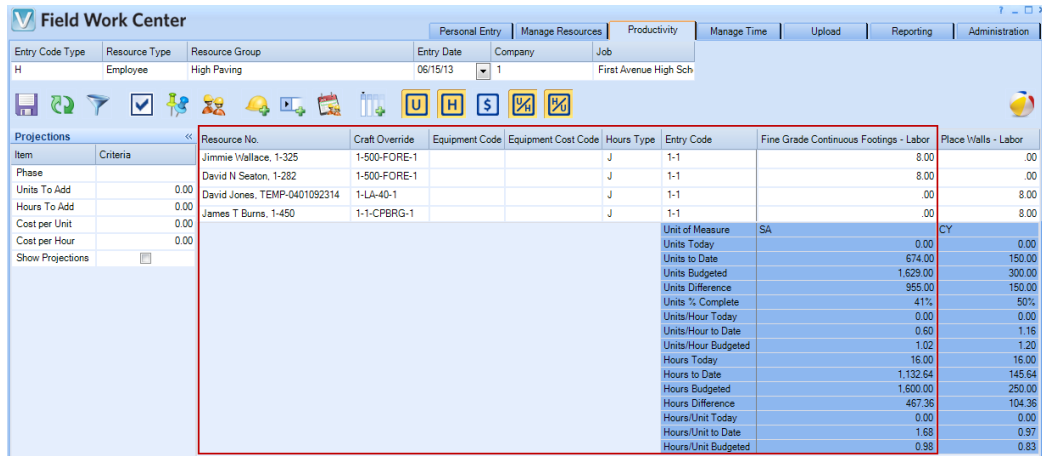
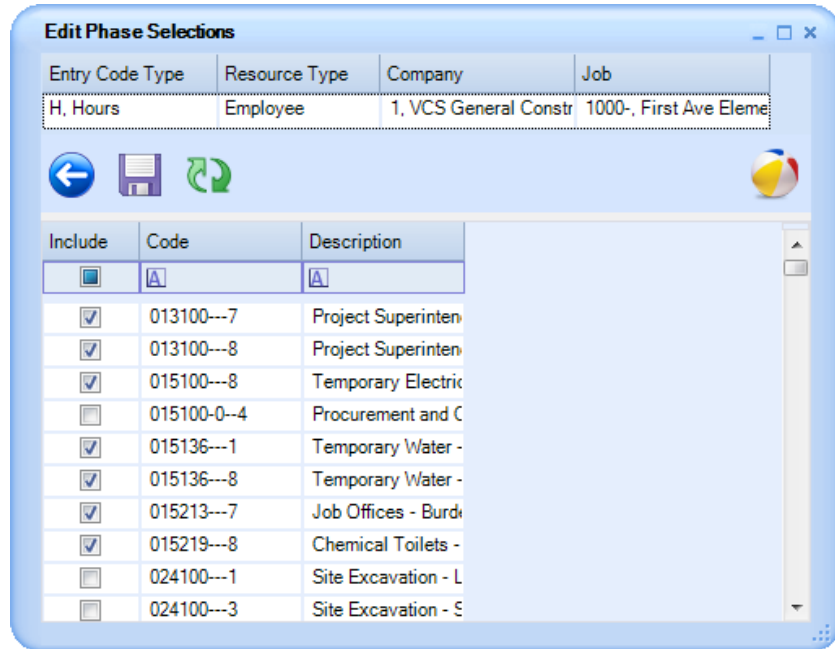
- a. Enter a new time clock record
- b. Distribute the time
- c. Split a distribution
- d. Create a distribution record with more than the maximum number of hours, in order to demonstrate the Alerts field.

## Productivity

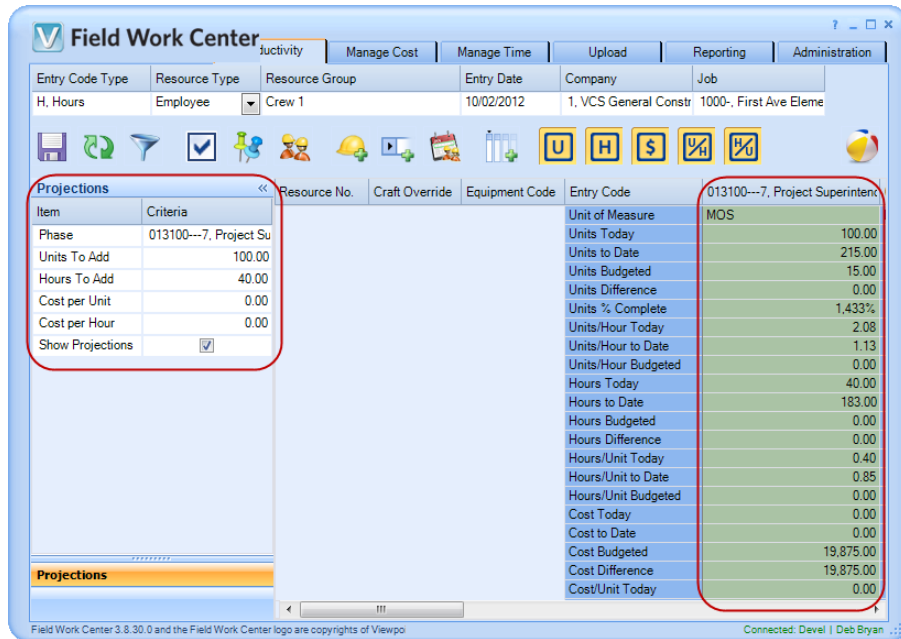
Productivity provides resource tracking capabilities from your back office accounting system. In addition to labor time and equipment usage, Field Work Center allows quantities to be entered and updated. Users can view period and job-to-date totals at the time of entry, and see in real-time, how quantities just entered impact totals. This integration allows multiple users to enter quantities for the same Cost distribution on a job. Afterwards they can be uploaded by a user having the necessary permissions.



1. Select the Productivity tab.
2. Select the Entry Code Type, Resource Type, Resource Group, Entry Date, Company, and Job.
3. Click the information tabs that you wish to list:
  -  Show Units
  -  Show Hours
  -  Show Cost
  -  Units per Hour
  -  Hours per Unit
4. Click the Edit Phases  icon to display all phases associated with the specified job. Select the phases that you want displayed.

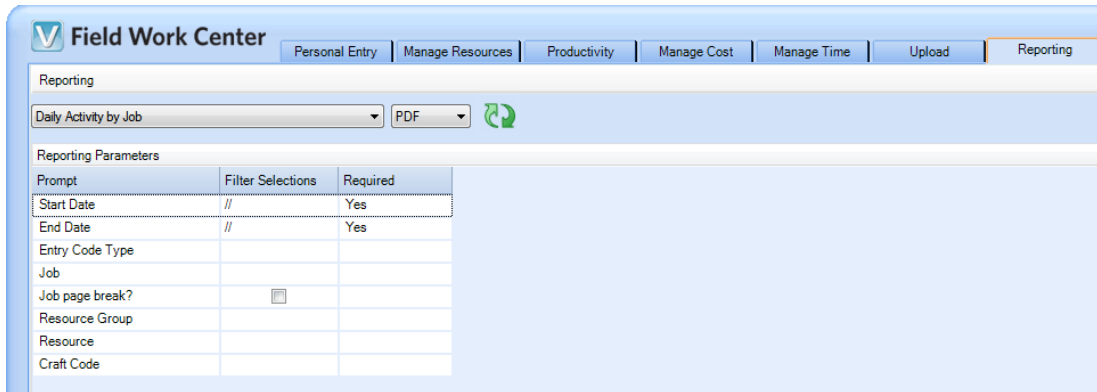


- Resources, Craft Override, Equipment Code, Entry Code, and the selected Phases are displayed with the Entry Date information. At this point, you can enter additional time records if needed.




6. **Projections** – Select the Phase and enter the projected **Units to Add**, **Hours to Add**, **Cost per Unit**, and **Cost per Hour**. Then check the **Show Projections** box.
7. Click **Refresh**. Field Work Center will recalculate the productivity information to include the projections entered.

## Reporting



**NOTE:** Adobe Reader (PDF) and Excel must be loaded on the workstation in order to run reports.

1. Select the report from the drop down list.
2. Select the report format (PDF or Excel).
3. Select the Reporting Parameters.
4. Click the **Refresh**  icon.

Each role in Field Work Center can be granted access to specific reports.

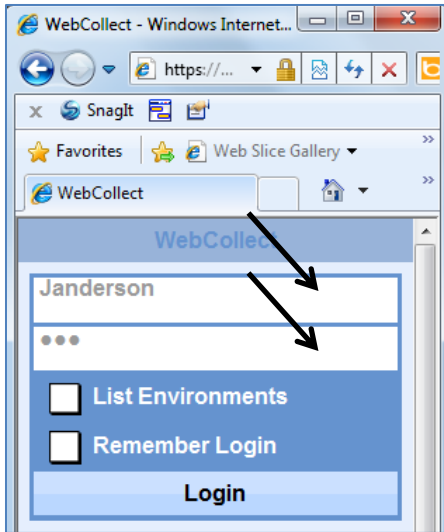
Show the Excel version of the report. Depending upon the individual configuration of the user's PC and their web browser, they may need to save the file, and then open it in Excel if it doesn't open up automatically in the web browser.

**NOTE:** Users can replace the Viewpoint Field Work Center logo on reports by replacing the logo.jpg file in Reporting Services. Contact Viewpoint Customer Support for details.

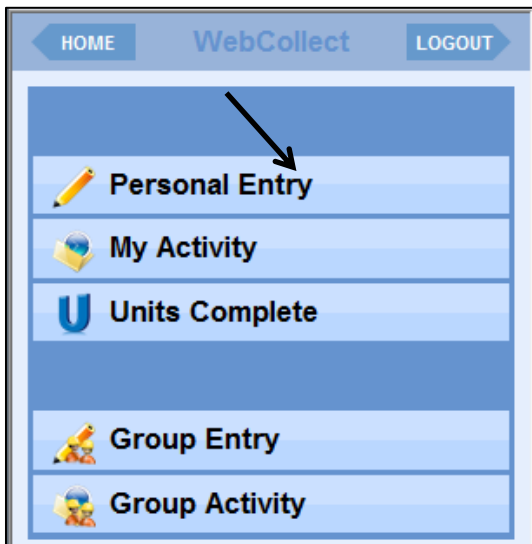
Job Distribution	Description	Rate	Union Code	Craft Code	Regular	Overtime	Dbletime	Benefit
<b>Alan PRts ACS781</b>								
<b>Mon 9/3/2012</b>								
1000-01-051-L	Building Layout	0.0000			0.00	0.00	0.00	8.00
<b>Total for Mon 9/3/2012</b>					<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>8.00</b>
<b>Tue 9/4/2012</b>								
1000-01-051-L	Building Layout	0.0000			8.00	0.00	0.00	0.00
<b>Total for Tue 9/4/2012</b>					<b>8.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

## Web-Collect

1. Log into the Clients Web-collect link.



2. Once you have logged in the Company WebCollect Link, enter your **User ID** and **Password**.



3. Select **Personal Entry**.

The screenshot shows a mobile application interface for 'WebCollect'. At the top, there are navigation buttons for 'HOME', 'WebCollect', and 'LOGOUT'. Below this is a header for 'PERSONAL ENTRY'. The main form area contains a date selector set to 'Mon, 4/30/2012'. Below the date are several dropdown menus: 'H, Hours', '00, Regular Earnings', '9999999, Overhead Job', '010-039-L, MISC.', and 'CAR2, Carpenter - Apprentice 2'. Below these is a text field containing '8.00'. There is a text area for notes with the placeholder text 'Put a note to the record...'. At the bottom of the form are two buttons: 'Submit' and 'Continue'.

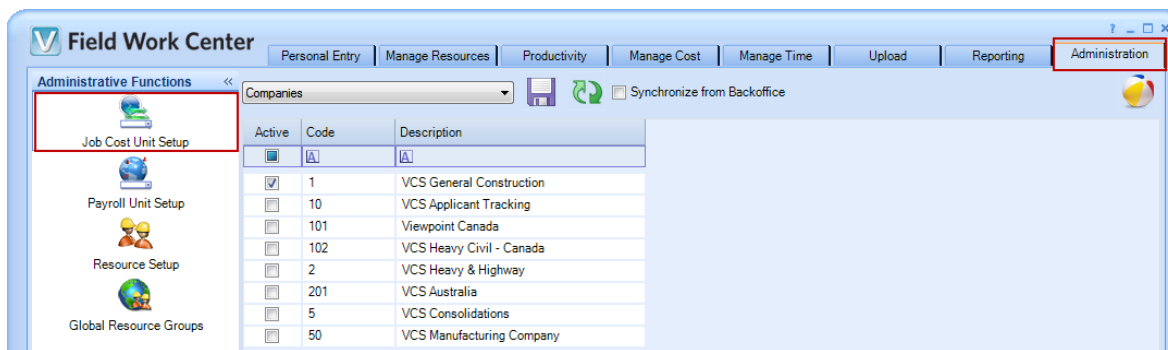
4. Review the entry screen and post some time, and then review the outcome in Field Work Center.
5. Spend some time entering time with the client.


## Day 2

### Administration

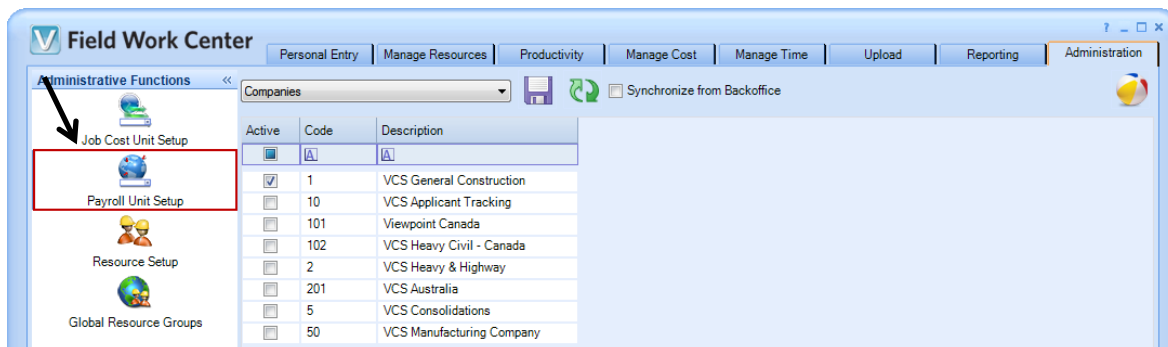
The Administration function is where we decide what data from the accounting system is available for use within Field Work Center. Additionally, this tab allows Resources to be managed and granted permissions. Application integration uses an adaptor to synchronize data and resources from a back office accounting system with Field Work Center.


### Job Cost Setup



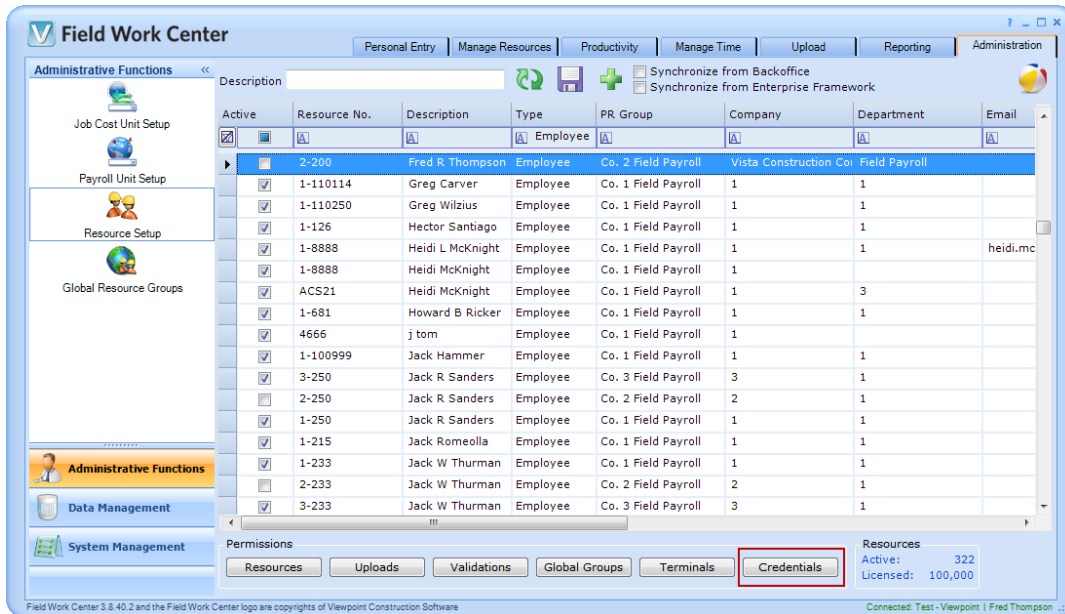
**Job Cost Unit Setup** is used to maintain the list of Job Cost companies, jobs, and phases that will be available within Field Work Center. First select the Companies that will be available in Field Work Center. Then select the Jobs that will be available for those companies, and finally, the Phases that will be available for those Jobs in Field Work Center. After each section is completed, make sure to click the **Save**  icon.


### Payroll Unit Setup

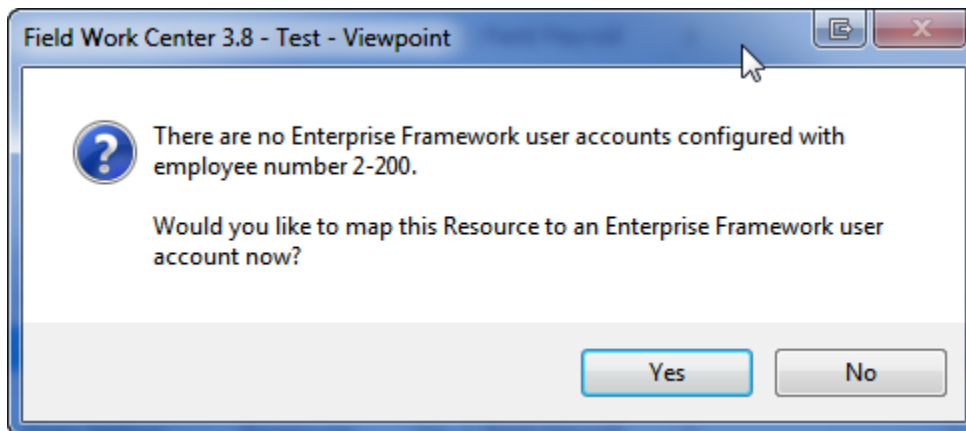


**Payroll Unit Setup** is used to maintain the list of companies and departments from Viewpoint that will be available within Field Work Center. Select the Companies and Divisions that will be available in Field Work Center. After each section is completed, make sure to click the **Save**  icon.

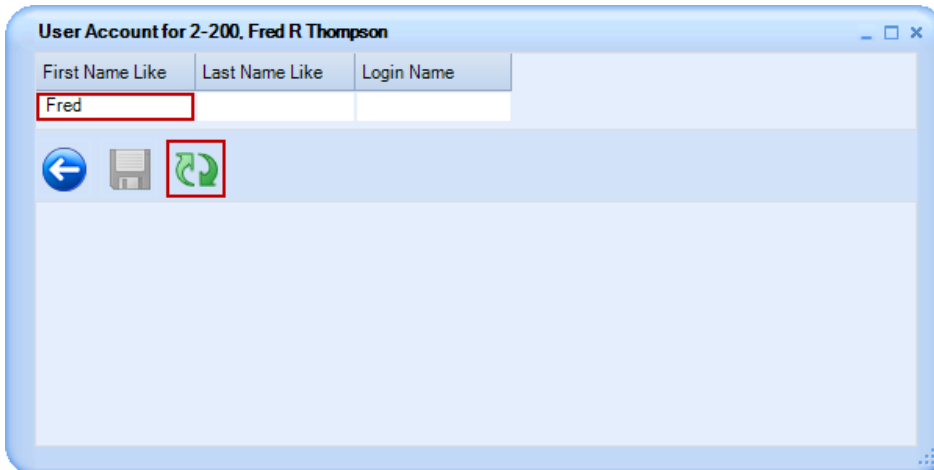
## Resource Setup



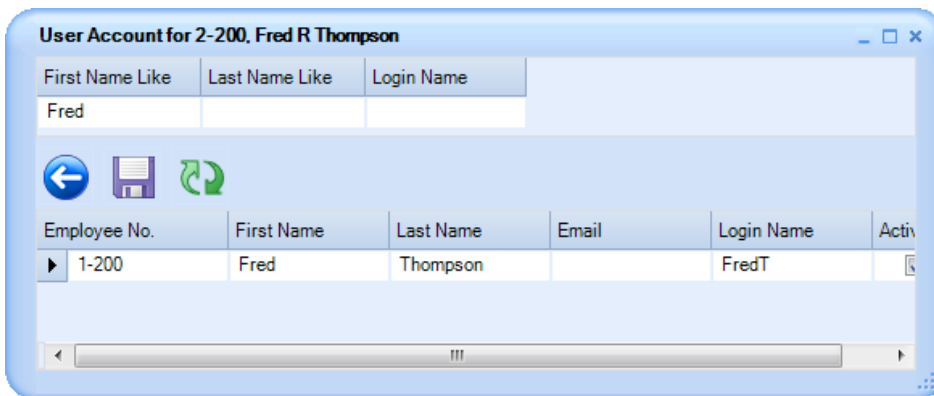
1. Select the Administration Tab.
2. Click on the **Resource Setup**  icon.
3. Use the filter function to locate the employee.
4. Select the employee.
5. Click on the **Credentials** button.




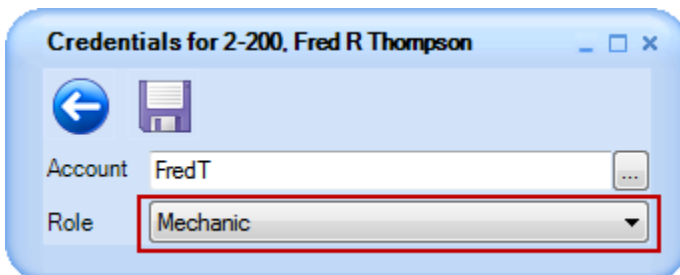
6. The following message may appear; if it does, click the **Yes** button.




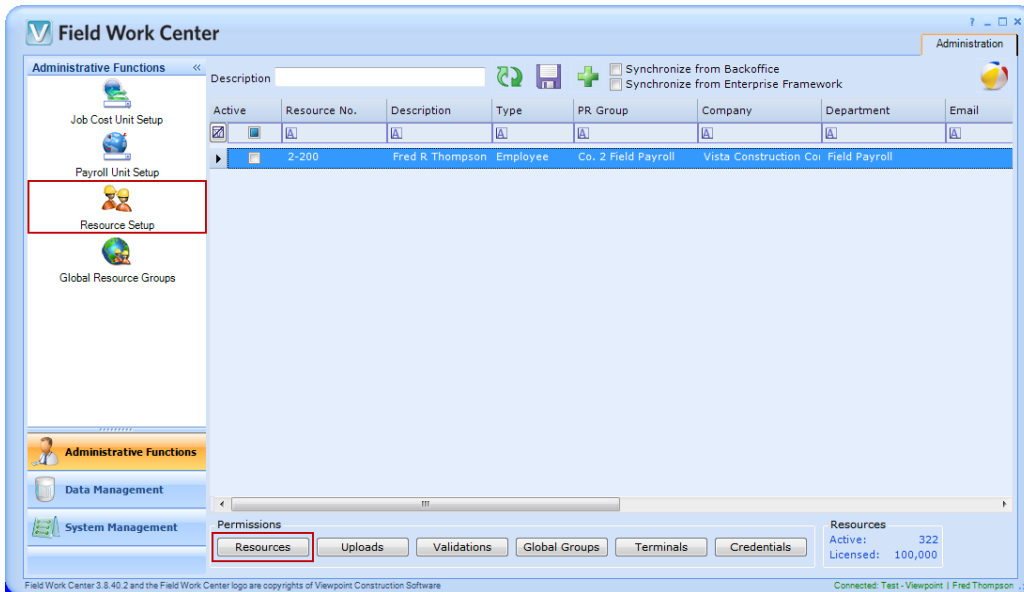
7. Type in the **User's First Name**.
8. Click the **Search** icon.



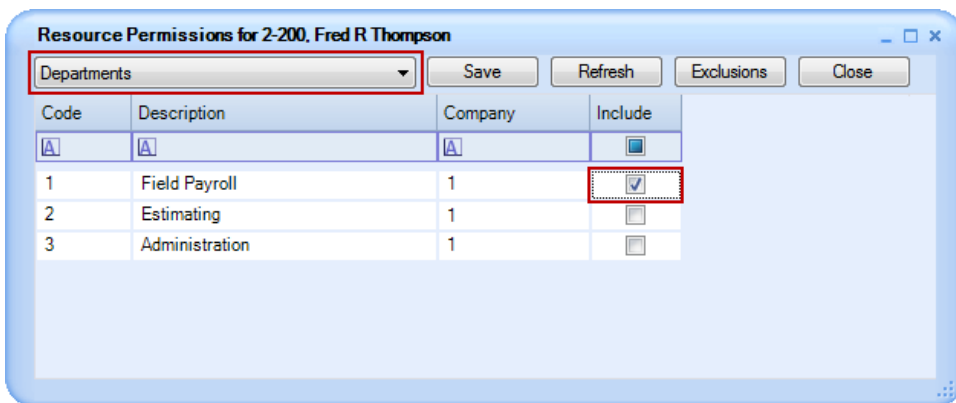
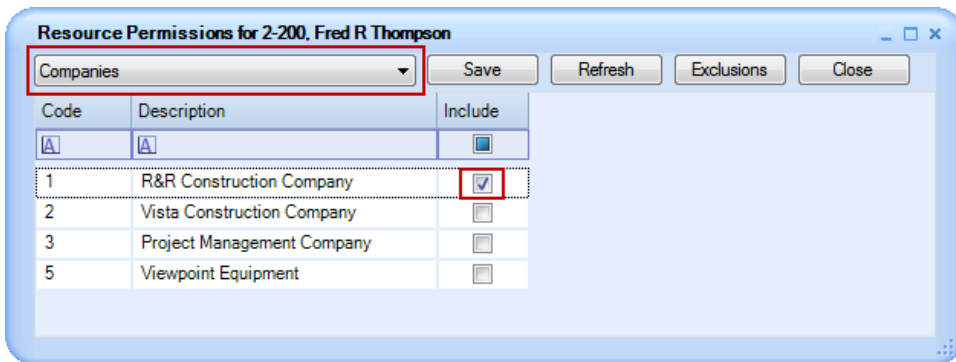
9. Select the **Employee**.
10. Click the **Save**  icon.



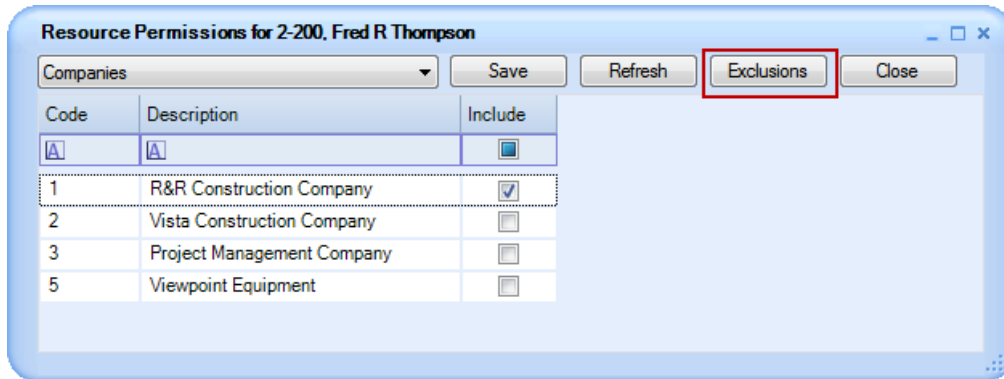
11. Select the **Role**.
12. Click the **Save**  icon.



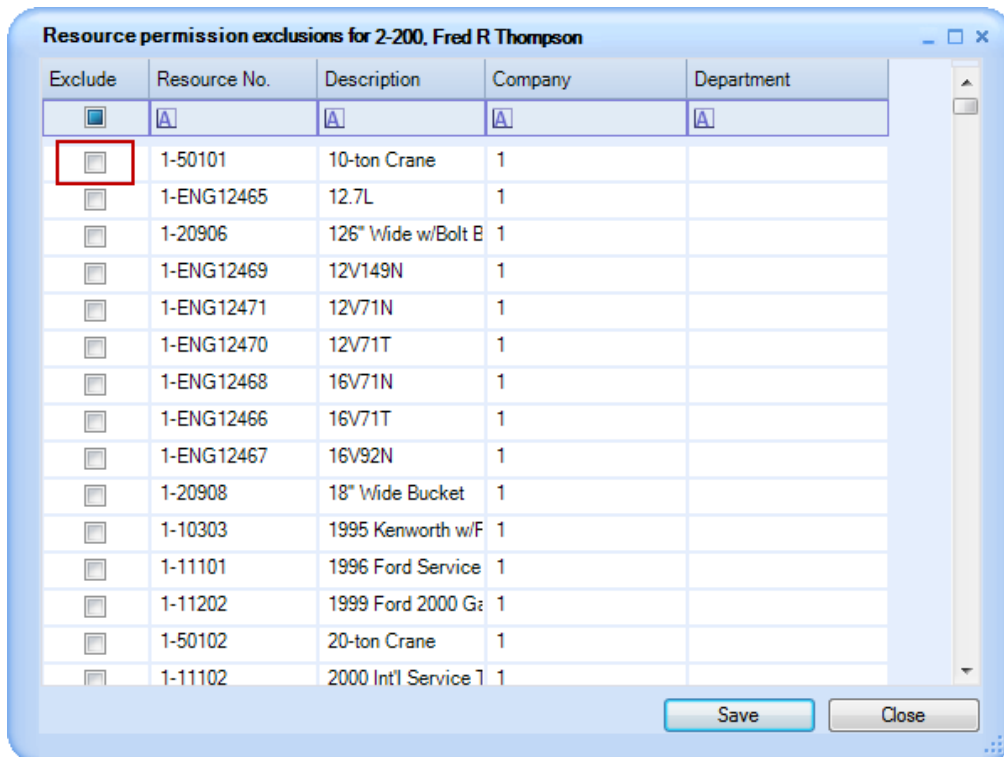
13. Click the **Resource** button.



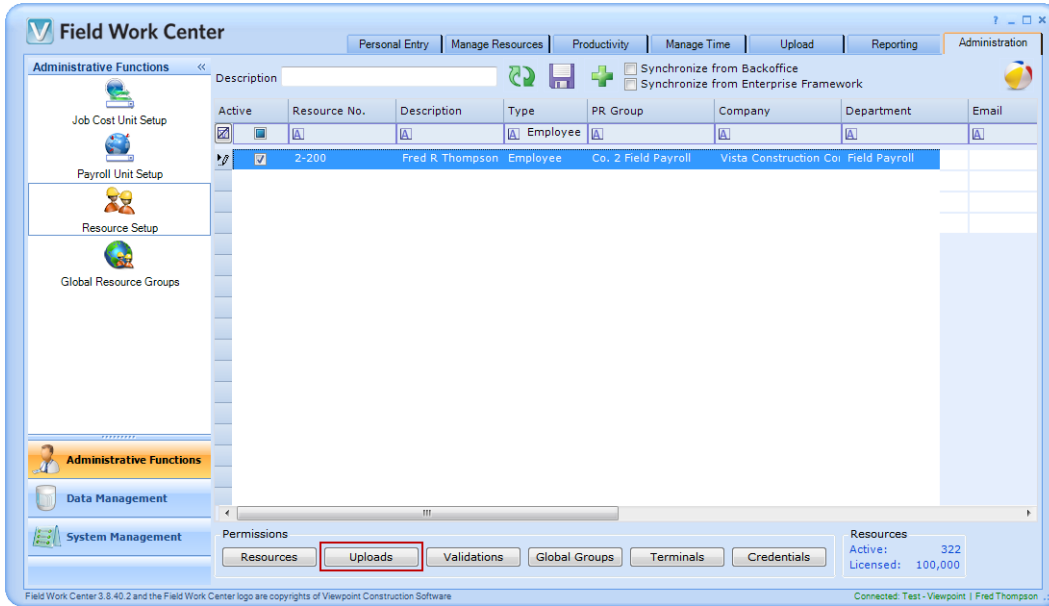
14. Select Companies or Departments (not both) that the Resource will have access to and click the **Save** icon.



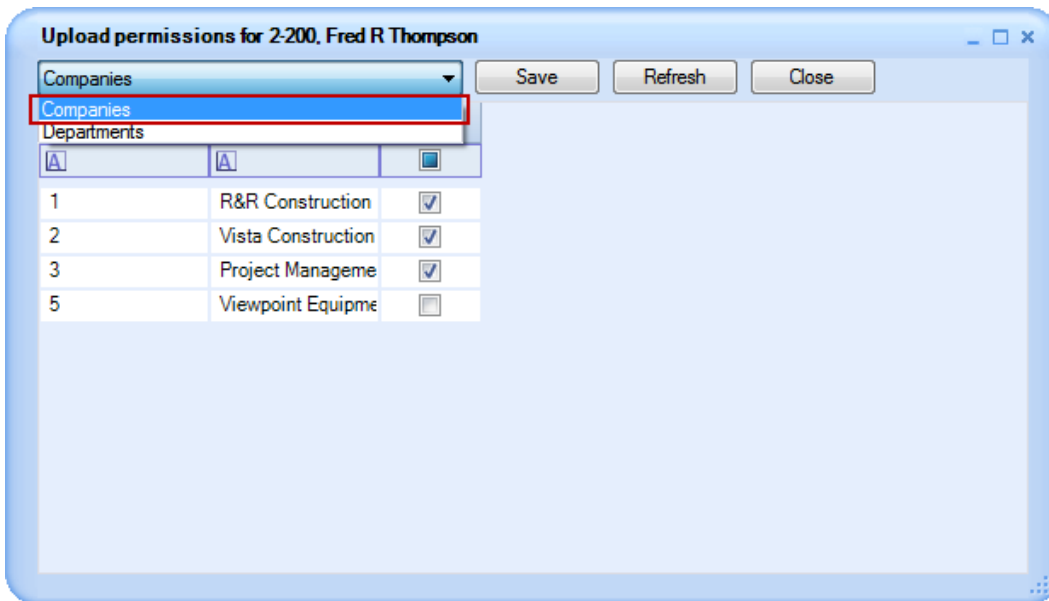
15. **Exclusions** – Click the Exclusions button to set up access exclusions for selected Resources.



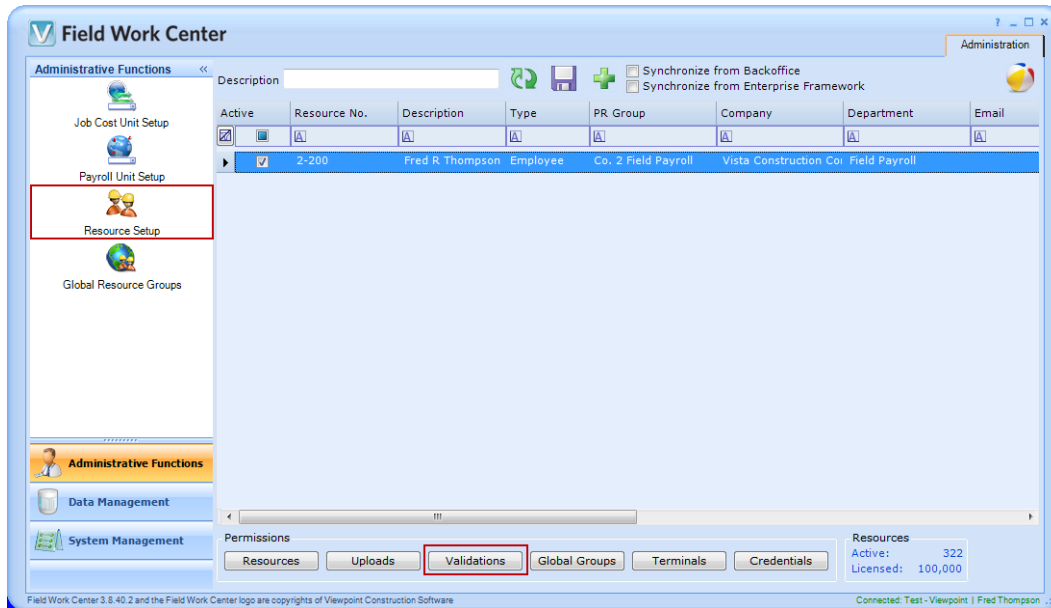
16. Select the Resources to Exclude.
17. Click the **Save** button.



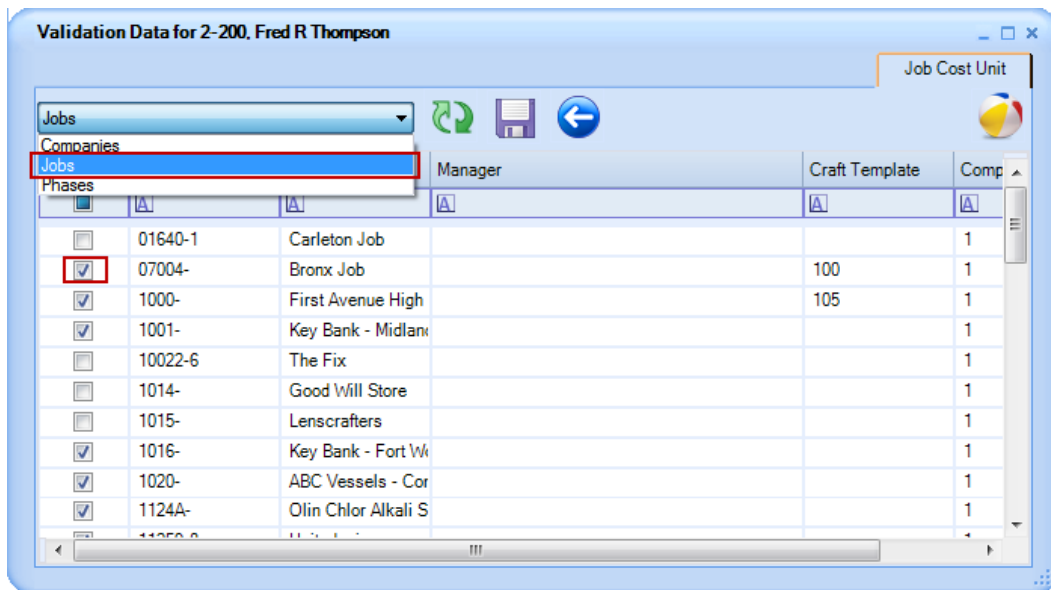
18. Click the **Uploads** button – This will allow the Resource to Upload to Viewpoint (usually given to Payroll and Admin roles only).



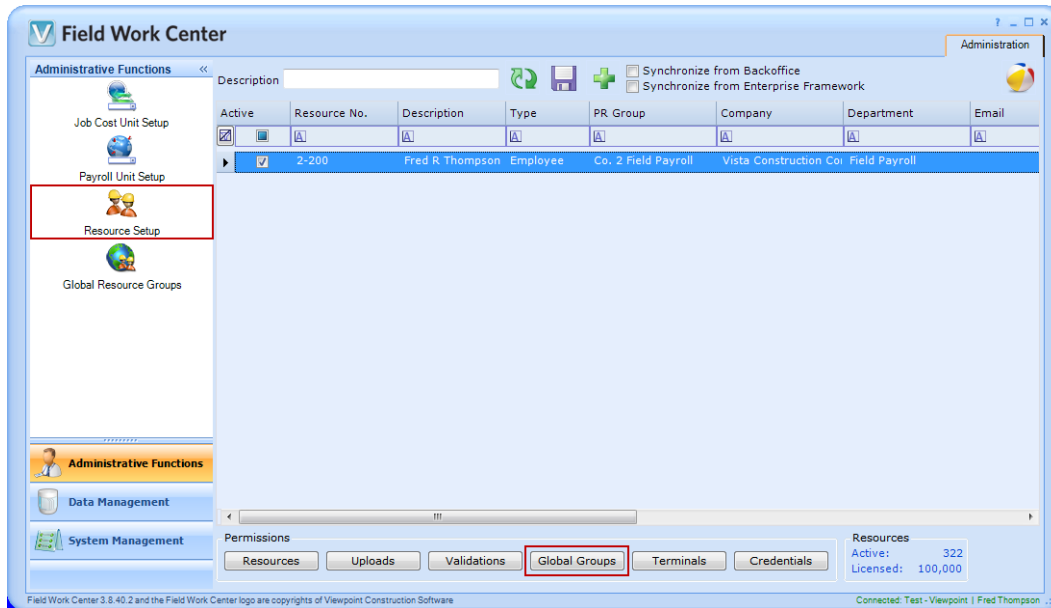
19. Select the Companies or Departments (not both) that the Resource will be able to upload to Viewpoint and click the **Save** button.



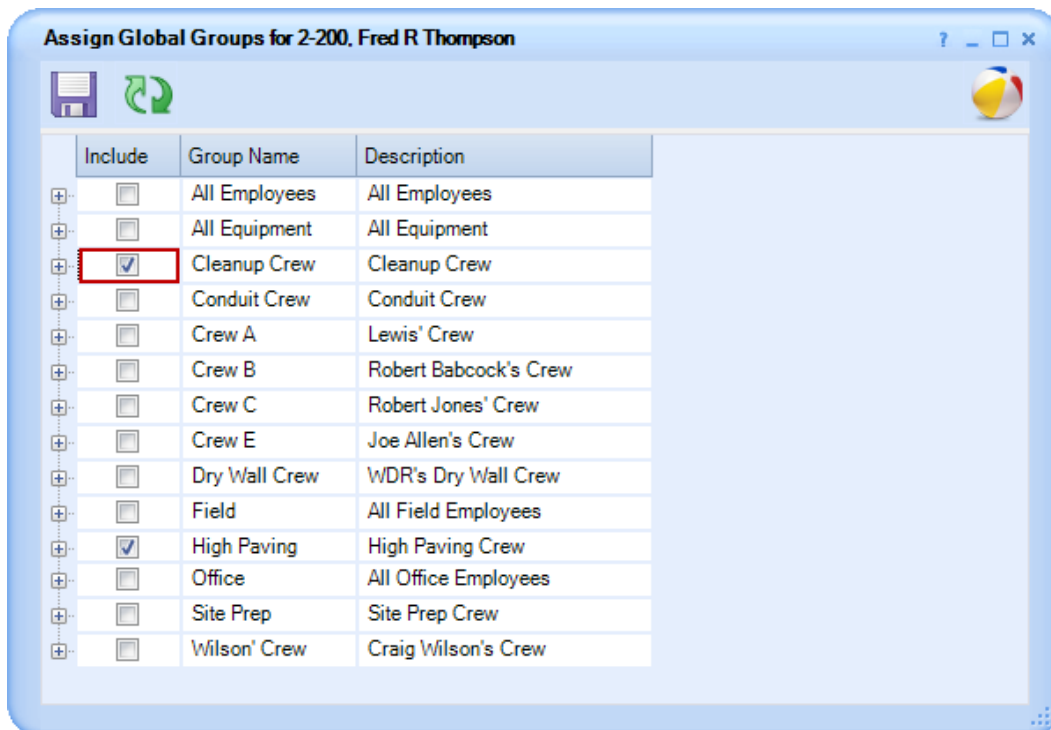
20. Click the **Validations** button – It reveals the Costing Level Validation Data permissions window that contains the list of active Companies, Jobs, and Phases in the Costing hierarchy.




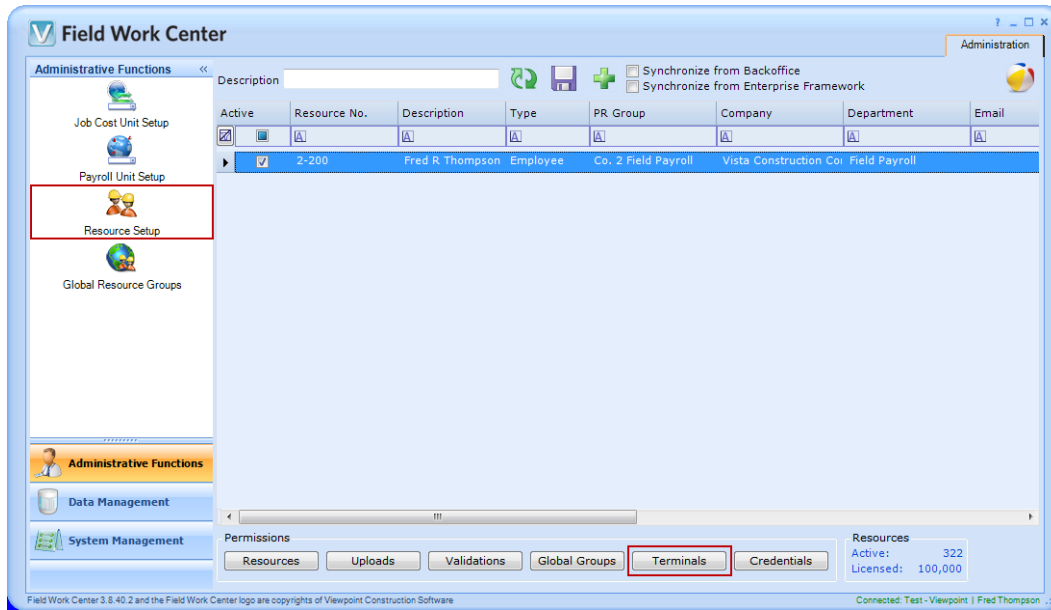
21. Select the **Companies, Jobs, and Phases** that the user will have access to from their drop-down list. After each section is completed, make sure to click the **Save** icon.



22. Click the **Global Groups** button.



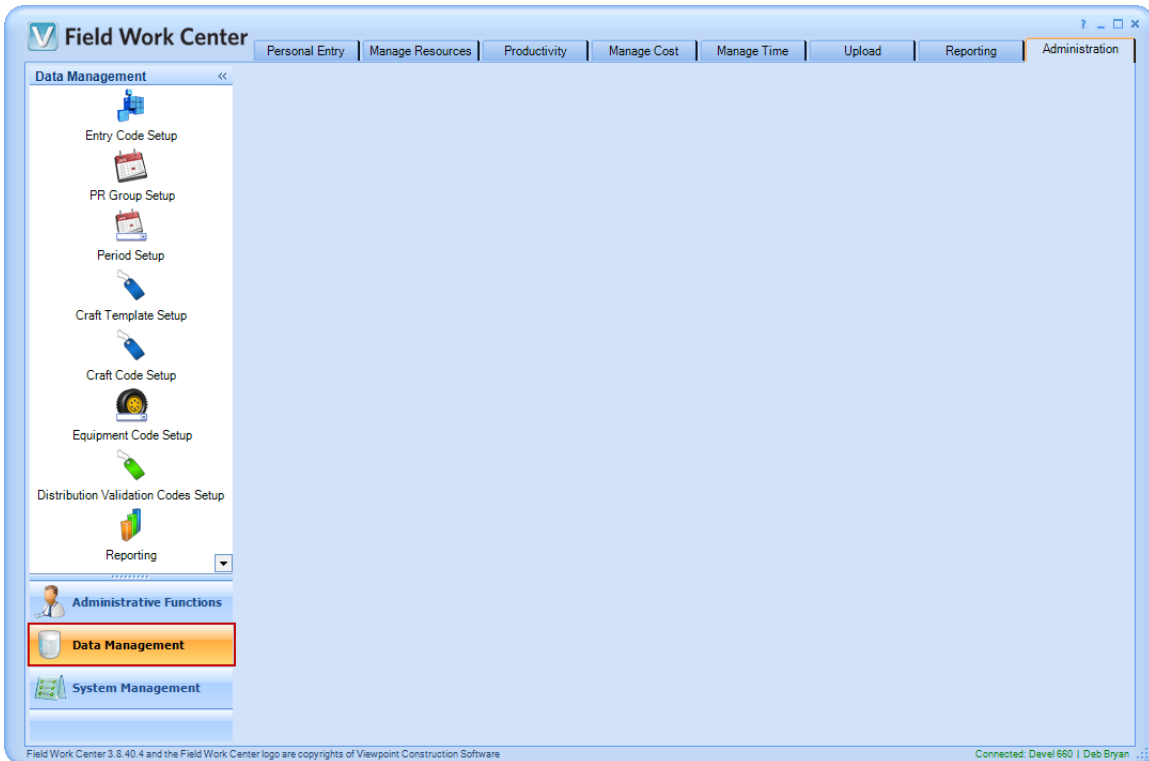
23. Select the Global Resource Groups that this Resource will have access to. Once the selections have been completed, click the **Save**  icon.



24. **Terminals** – This option is only used if Time Clocks are in use, and is currently not discussed here.

## Data Management

The **Data Management** section of the Administration tab is where we configure the use of many of the codes which have come over from Viewpoint.



## Entry Code Setup

Here is where we decide what codes are to be displayed within Field Work Center, and how the information is combined for display on reports, and on the screen.

**At this point select someone from the Payroll department and have them sit in the hot seat to make the changes, as discussed below.** [Work with students to decide which codes will be active in Field Work Center.]

The **Sub Type** column is used on many reports. [Work with students to decide in which column each code should appear.]

The screenshot shows the 'Field Work Center' application window. The 'Data Management' section is active, and the 'Hours' dropdown is selected. The 'Entry Code Setup' option is highlighted in the left-hand navigation menu. The main table lists various entry codes with their respective details.

Active	Code	Description	Sub Type	Manage Time Type	Exempt	Non-Exempt	From Backoffice	Can Upload
<input checked="" type="checkbox"/>	1-1	RT	Regular Time	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-10	Sick Pay - PR Time Card	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-11	Hotel - PR Time Card	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-12	Reimbursed Expenses	Benefits	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-13	Fringe	Benefits	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-14	Discontinue		Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-2	OT	Over Time	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-3	DT	Double Time	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-30	Trip Charge		Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-35	Per Diem		Not Specified	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-4	Salary	Regular Time	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-5	Bonus	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-6	Subsistence (NoTax)	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-7	Salary to Jobs	Regular Time	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-8	Vacation-Hrly	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-9	Vacation-Salary	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

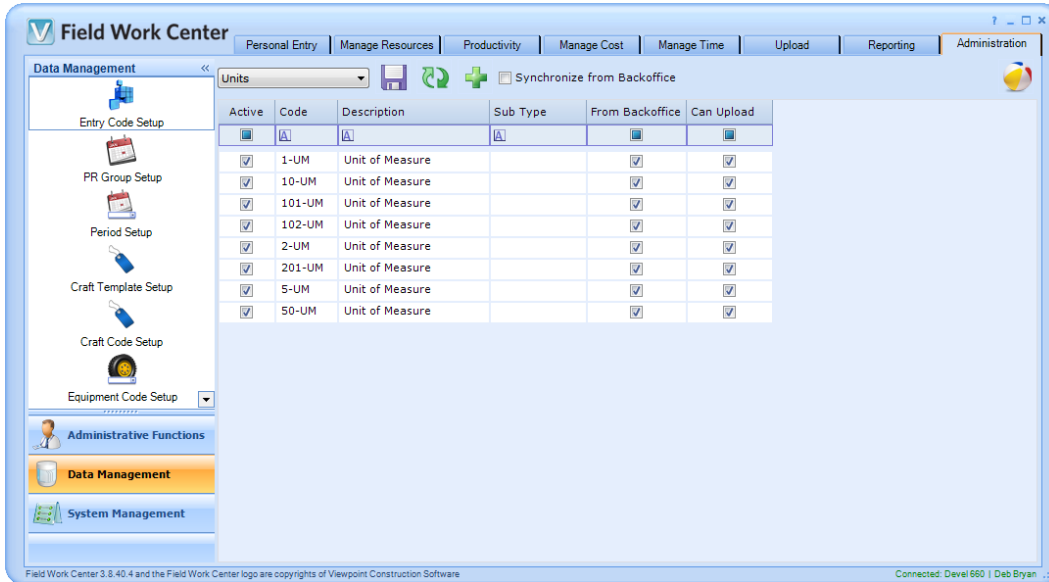
For **Hours** and **Costing Hours** entry codes, the **Manage Time Type** column is used to indicate whether the hours posted to a particular entry code should be listed in the Regular or Premium column of the Manage Time tab. [Work with students to decide in what column each code should appear.]

The **Can Upload** column determines if the entry code is only being collected for use within Field Work Center, or if it will be uploaded to Viewpoint.

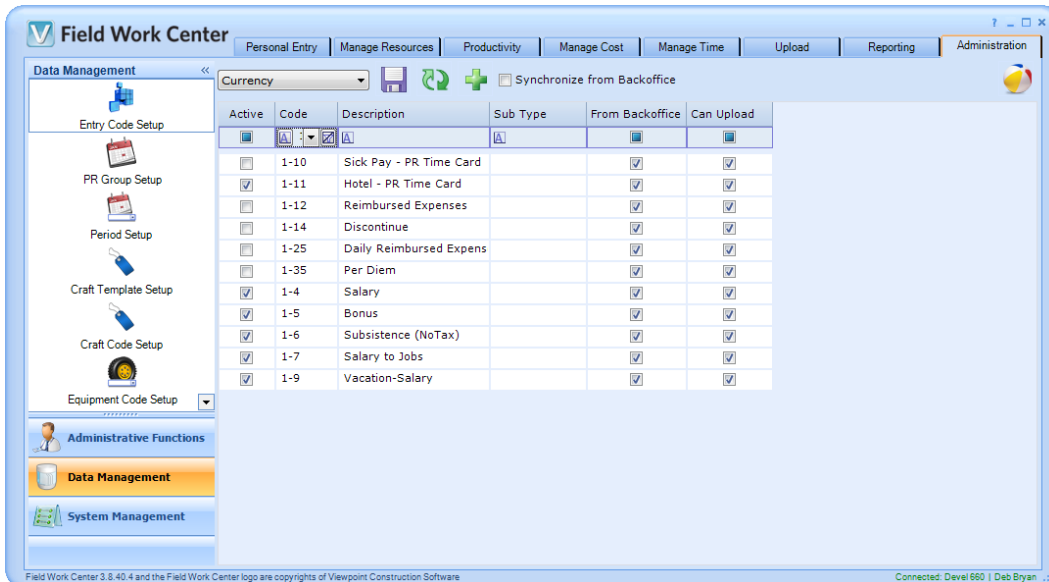
The screenshot shows the 'Field Work Center' application window. The 'Hours' tab is active, displaying a table of entry codes. The 'Manage Time Type' column is highlighted with a red box, and its dropdown menu is open, showing options: (Custom) (Blanks), (NonBlanks), Not Specified, Premium, and Regular. The 'Can Upload' column for the first row is also highlighted with a red box. The interface includes a left-hand navigation menu with options like 'Entry Code Setup', 'PR Group Setup', 'Period Setup', 'Craft Template Setup', 'Craft Code Setup', 'Equipment Code Setup', and 'Distribution Validation Codes Setup'. At the bottom, it shows 'Administrative Functions', 'Data Management', and 'System Management' sections.

Active	Code	Description	Sub Type	Manage Time Type	Exempt	Non-Exempt	From Backoffice	Can Upload
<input checked="" type="checkbox"/>	1-1	RT	Regular Time	(Custom) (Blanks)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-10	Sick Pay - PR Time Card	Benefits	(NonBlanks)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-11	Hotel - PR Time Card	Benefits	Not Specified	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-12	Reimbursed Expenses	Benefits	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-13	Fringe	Benefits	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-14	Discontinue		Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-2	OT	Over Time	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-3	DT	Double Time	Premium	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-30	Trip Charge		Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-35	Per Diem		Not Specified	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-4	Salary	Regular Time	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	1-5	Bonus	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-6	Subsistence (NoTax)	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-7	Salary to Jobs	Regular Time	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-8	Vacation-Hrly	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1-9	Vacation-Salary	Benefits	Regular	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

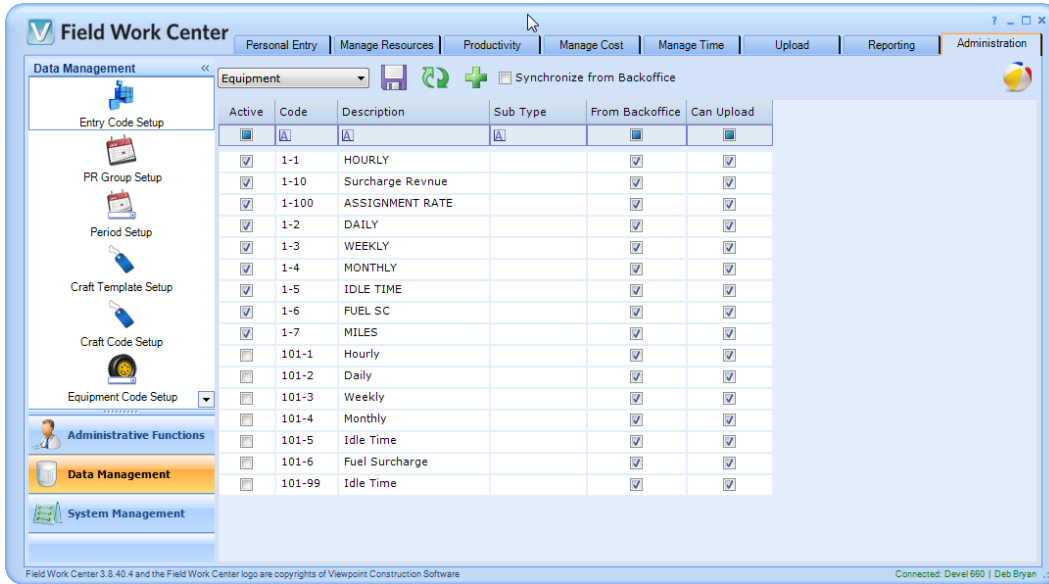
1. There is only one entry code for units. Select the companies for which production units will be entered.



2. Select each **Entry Code** that users will be able to use with the Currency entry code type in Field Work Center.

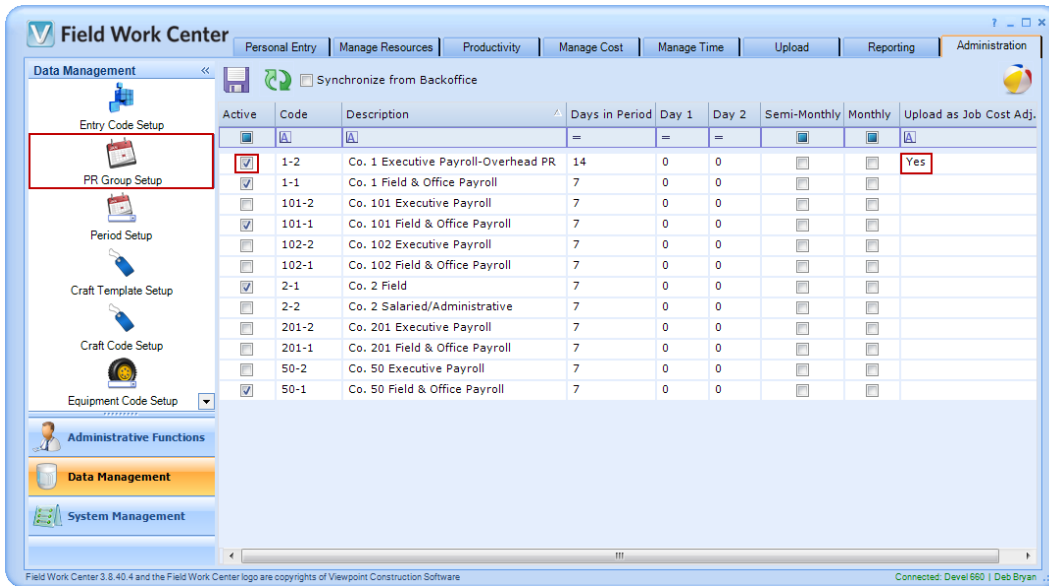


3. **Optional (For clients who have licensed the Equipment Adapter):** Select the codes that users will be able to use for Equipment Hours entry within Field Work Center.




## PR Group Setup

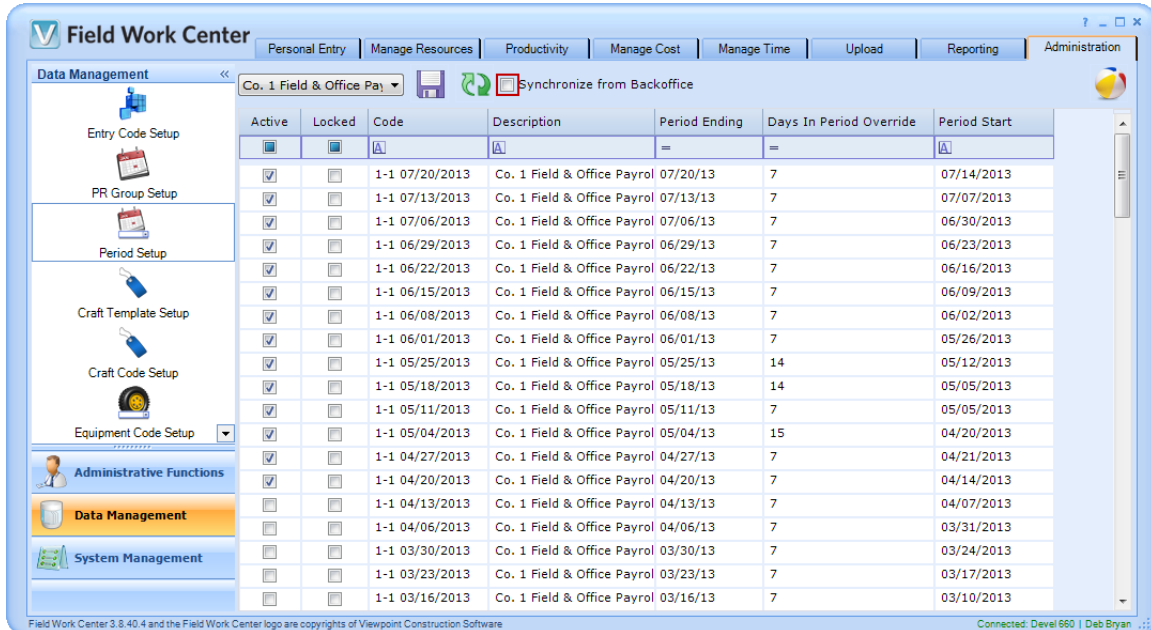
1. Select the **Payroll Groups** you want active in Field Work Center.
2. Define which payroll groups should be uploaded to Job Cost as Cost Adjustments. [This is not a drop-down option, so you will need to manually enter **Yes**.]



## Period Setup

For Viewpoint users, there is nothing for the user to change here, as periods are managed by Viewpoint. If you have added a new period in Viewpoint and it has not shown up in Field Work Center yet, check the **Synchronize from Backoffice** box and then click **Refresh** .

**NOTE:** Users will need an open payroll period in order to enter their time, so be sure to have at least the current period open.



Active	Locked	Code	Description	Period Ending	Days In Period Override	Period Start
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 07/20/2013	Co. 1 Field & Office Payrol	07/20/13	7	07/14/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 07/13/2013	Co. 1 Field & Office Payrol	07/13/13	7	07/07/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 07/06/2013	Co. 1 Field & Office Payrol	07/06/13	7	06/30/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 06/29/2013	Co. 1 Field & Office Payrol	06/29/13	7	06/23/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 06/22/2013	Co. 1 Field & Office Payrol	06/22/13	7	06/16/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 06/15/2013	Co. 1 Field & Office Payrol	06/15/13	7	06/09/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 06/08/2013	Co. 1 Field & Office Payrol	06/08/13	7	06/02/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 06/01/2013	Co. 1 Field & Office Payrol	06/01/13	7	05/26/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 05/25/2013	Co. 1 Field & Office Payrol	05/25/13	14	05/12/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 05/18/2013	Co. 1 Field & Office Payrol	05/18/13	14	05/05/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 05/11/2013	Co. 1 Field & Office Payrol	05/11/13	7	05/05/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 05/04/2013	Co. 1 Field & Office Payrol	05/04/13	15	04/20/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 04/27/2013	Co. 1 Field & Office Payrol	04/27/13	7	04/21/2013
<input checked="" type="checkbox"/>	<input type="checkbox"/>	1-1 04/20/2013	Co. 1 Field & Office Payrol	04/20/13	7	04/14/2013
<input type="checkbox"/>	<input type="checkbox"/>	1-1 04/13/2013	Co. 1 Field & Office Payrol	04/13/13	7	04/07/2013
<input type="checkbox"/>	<input type="checkbox"/>	1-1 04/06/2013	Co. 1 Field & Office Payrol	04/06/13	7	03/31/2013
<input type="checkbox"/>	<input type="checkbox"/>	1-1 03/30/2013	Co. 1 Field & Office Payrol	03/30/13	7	03/24/2013
<input type="checkbox"/>	<input type="checkbox"/>	1-1 03/23/2013	Co. 1 Field & Office Payrol	03/23/13	7	03/17/2013
<input type="checkbox"/>	<input type="checkbox"/>	1-1 03/16/2013	Co. 1 Field & Office Payrol	03/16/13	7	03/10/2013

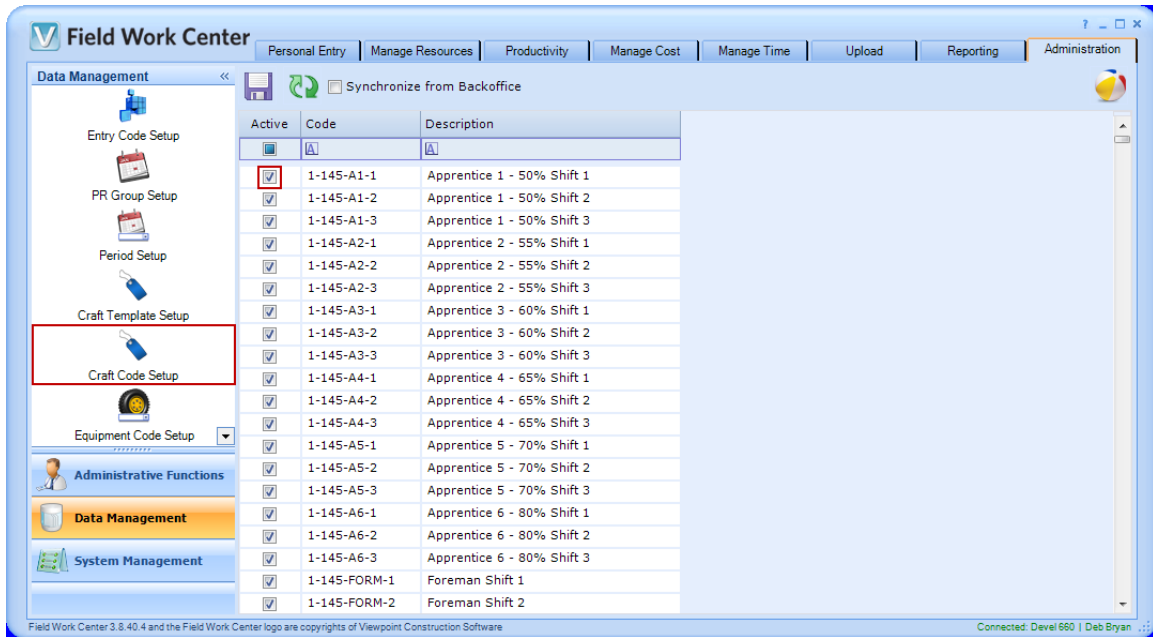
## Craft Template Setup

Craft Templates come from over from Viewpoint and are primarily used to override standard craft/class information. If you would like to disable any of them to prevent their use within Field Work Center, uncheck the **Active** box here.

Active	Craft Code	Template	Job Craft	Description	Company
<input type="checkbox"/>	302	3	OE20		1
<input checked="" type="checkbox"/>	701	3	302		1
<input checked="" type="checkbox"/>	CARP	1	CARP		1
<input checked="" type="checkbox"/>	LABR	1	CARP		1
<input checked="" type="checkbox"/>	OPER	1	302		1

## Craft Code Setup

These craft codes have all come over from Viewpoint. If you would like to disable any of them to prevent their use within Field Work Center, uncheck the **Active** box here.



## Equipment Code Setup

This is where you will set up and maintain all of the equipment used by your company (owned and/or rented). For Viewpoint users with the Equipment Management module, Equipment Codes will come from Viewpoint. If you would like to disable any of them to prevent their use within Field Work Center, uncheck the **Active** box here.

The screenshot shows the 'Field Work Center' application window. The top navigation bar includes tabs for Personal Entry, Manage Resources, Productivity, Manage Cost, Manage Time, Upload, Reporting, and Administration. The left sidebar contains a 'Data Management' section with icons for Entry Code Setup, PR Group Setup, Period Setup, Craft Template Setup, Craft Code Setup, and Equipment Code Setup. The 'Equipment Code Setup' option is selected. The main content area displays a table with the following data:

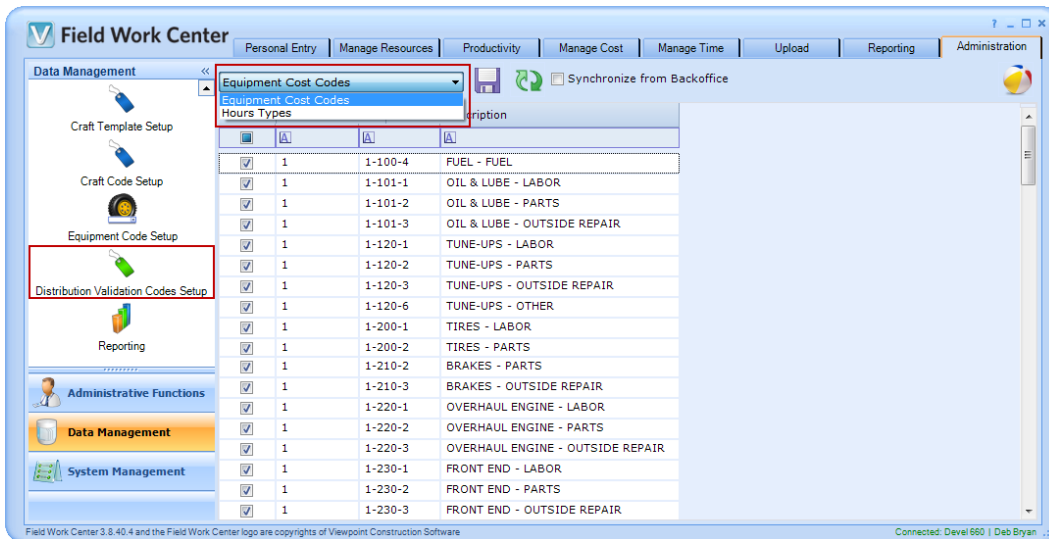
Active	Code	Description
<input checked="" type="checkbox"/>	1-145-A1-1	Apprentice 1 - 50% Shift 1
<input checked="" type="checkbox"/>	1-145-A1-2	Apprentice 1 - 50% Shift 2
<input checked="" type="checkbox"/>	1-145-A1-3	Apprentice 1 - 50% Shift 3
<input checked="" type="checkbox"/>	1-145-A2-1	Apprentice 2 - 55% Shift 1
<input checked="" type="checkbox"/>	1-145-A2-2	Apprentice 2 - 55% Shift 2
<input checked="" type="checkbox"/>	1-145-A2-3	Apprentice 2 - 55% Shift 3
<input checked="" type="checkbox"/>	1-145-A3-1	Apprentice 3 - 60% Shift 1
<input checked="" type="checkbox"/>	1-145-A3-2	Apprentice 3 - 60% Shift 2
<input checked="" type="checkbox"/>	1-145-A3-3	Apprentice 3 - 60% Shift 3
<input checked="" type="checkbox"/>	1-145-A4-1	Apprentice 4 - 65% Shift 1
<input checked="" type="checkbox"/>	1-145-A4-2	Apprentice 4 - 65% Shift 2
<input checked="" type="checkbox"/>	1-145-A4-3	Apprentice 4 - 65% Shift 3
<input checked="" type="checkbox"/>	1-145-A5-1	Apprentice 5 - 70% Shift 1
<input checked="" type="checkbox"/>	1-145-A5-2	Apprentice 5 - 70% Shift 2
<input checked="" type="checkbox"/>	1-145-A5-3	Apprentice 5 - 70% Shift 3
<input checked="" type="checkbox"/>	1-145-A6-1	Apprentice 6 - 80% Shift 1
<input checked="" type="checkbox"/>	1-145-A6-2	Apprentice 6 - 80% Shift 2
<input checked="" type="checkbox"/>	1-145-A6-3	Apprentice 6 - 80% Shift 3
<input checked="" type="checkbox"/>	1-145-FORM-1	Foreman Shift 1
<input checked="" type="checkbox"/>	1-145-FORM-2	Foreman Shift 2

The bottom status bar indicates 'Field Work Center 3.8.40.4 and the Field Work Center logo are copyrights of Viewpoint Construction Software' and 'Connected: Dlevel 660 | Deb Bryan'.

## Distribution Validation Codes Setup

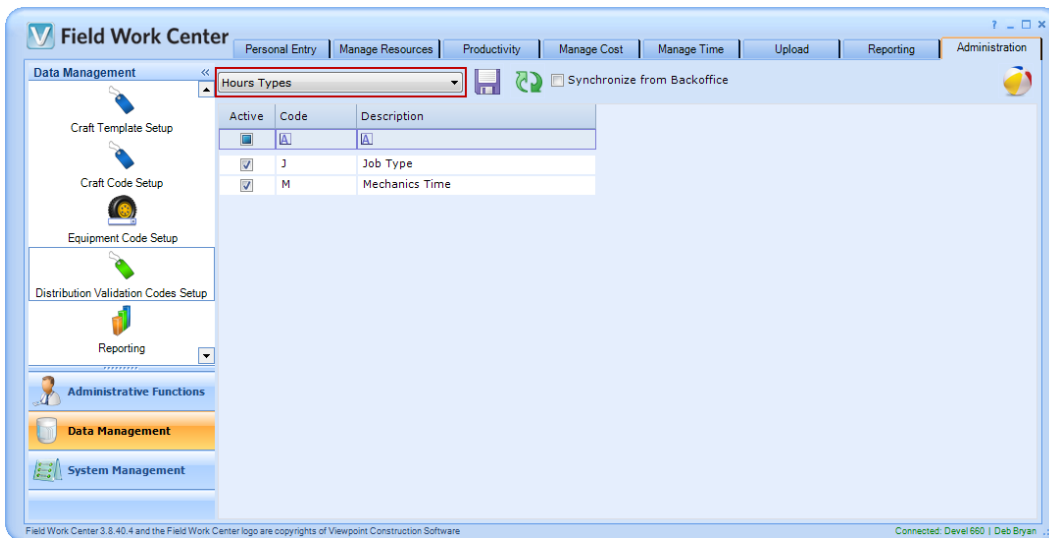
### Equipment Cost Codes

These are the codes used in Payroll Entry when an employee's time is charged to a piece of equipment. You will only use these codes if you are also using Equipment Codes. Check the **Active** box for each of the codes that will be used in Field Work Center.



### Hour Types

These codes identify the types of hours being entered in Field Work Center. Check the **Active** box for each of the codes that will be used in Field Work Center.



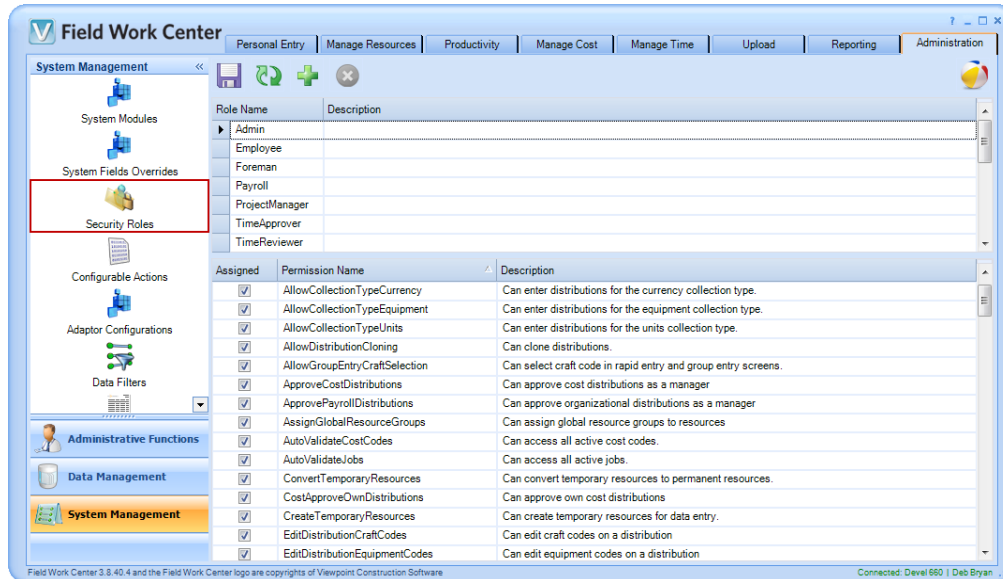
## Roles & Permissions

1. Discuss roles and permissions within roles
2. Default roles – Start discussion about possible roles, existing and new, for use within their organization.
3. Hand out spreadsheet and describe each permission as students fill out spreadsheet.

**At this point, have an administrative student from the class come up to the hot seat.**

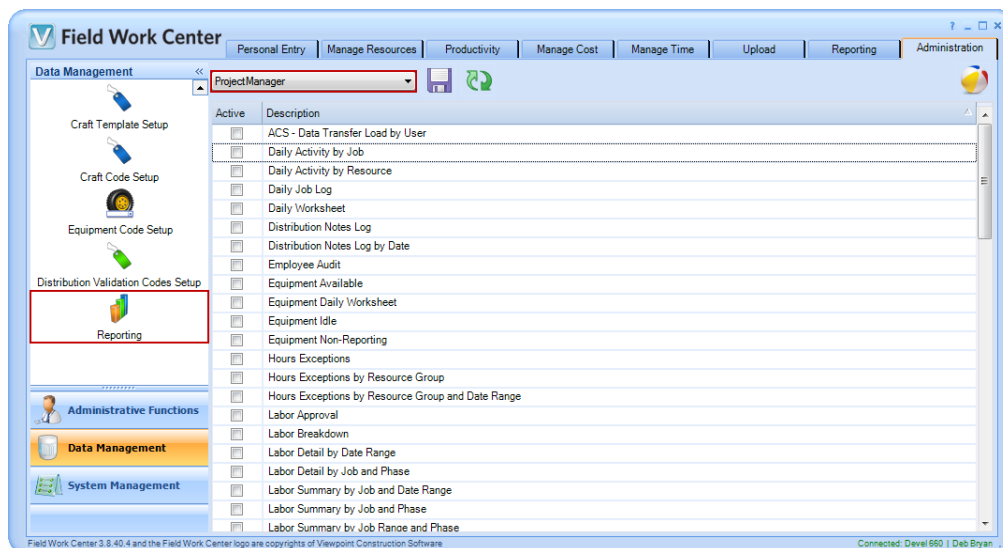
## Assigning Permissions

The Security Roles module (System Management menu) is where you define permissions by Role. Roles are then assigned to users to determine what information they can access, enter, select, edit, or view.



## Reporting

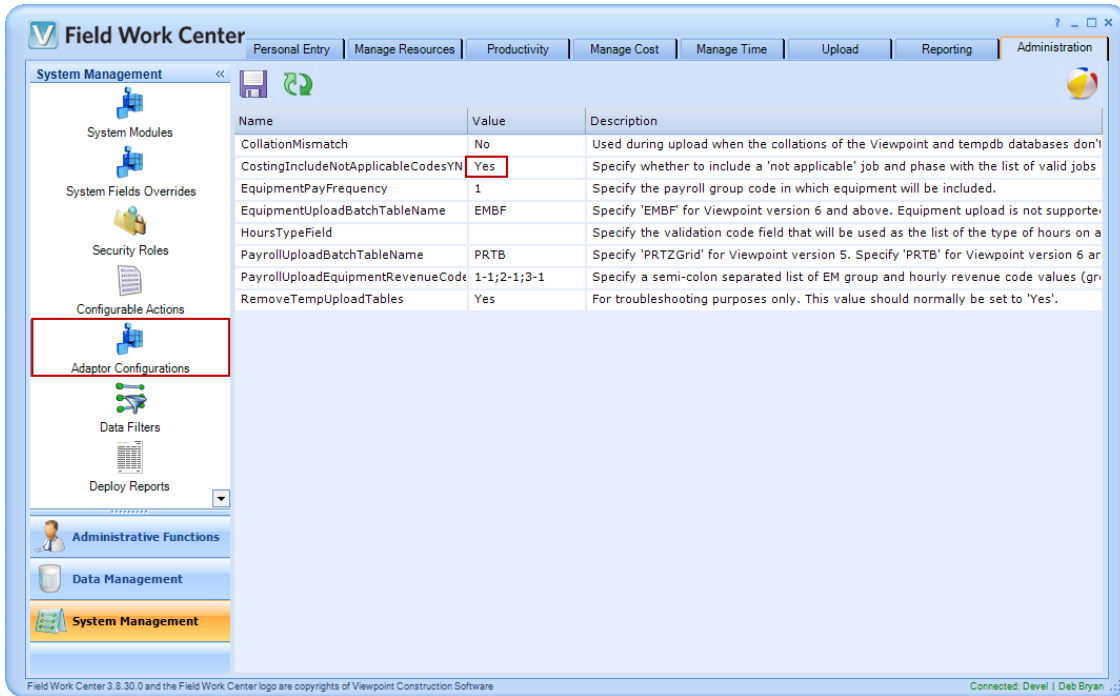
The Reporting module (Data Management menu) is used to set access to reports for each of the Roles defined in Security Roles. Have the student set up reports for the roles defined on the spreadsheet.



## Indirect Job Costing

If management wants some users to have an **N/A** job available for charging non-job cost time, select **Yes** for the **CostingIncludeNotApplicableCodesYN** option. Otherwise, leave the option as defaulted.

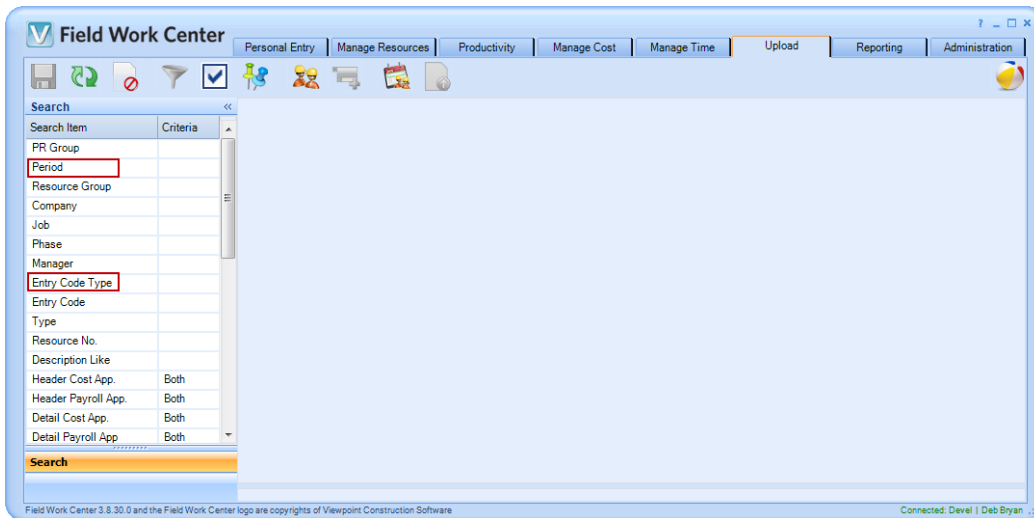
Selecting **Yes** will make the **N/A** job and phase available for adding to a particular user's job costing validation set.




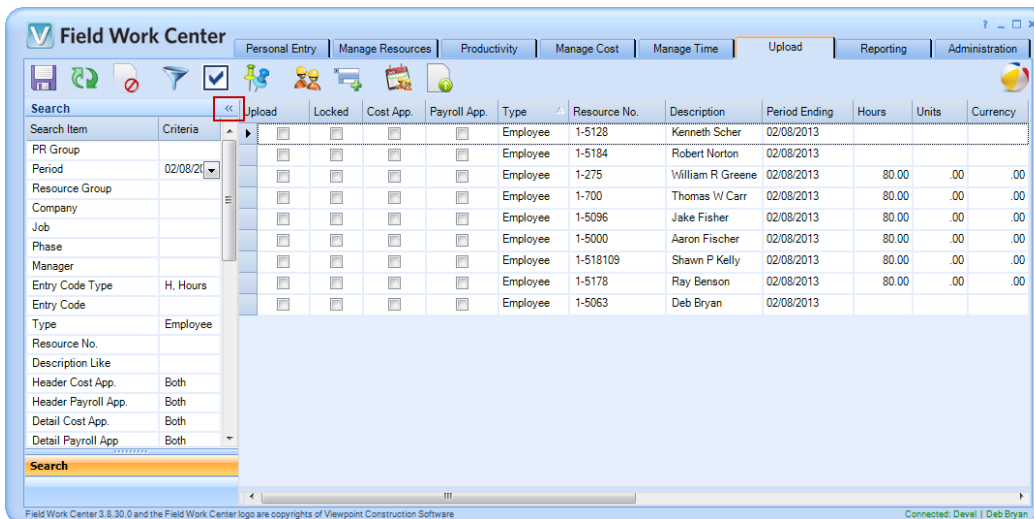
## Upload

The Upload tab is where you perform a final review of transactions and then upload them to Viewpoint.

1. Select the **current period** and Entry Code Type **H** (for payroll hours).

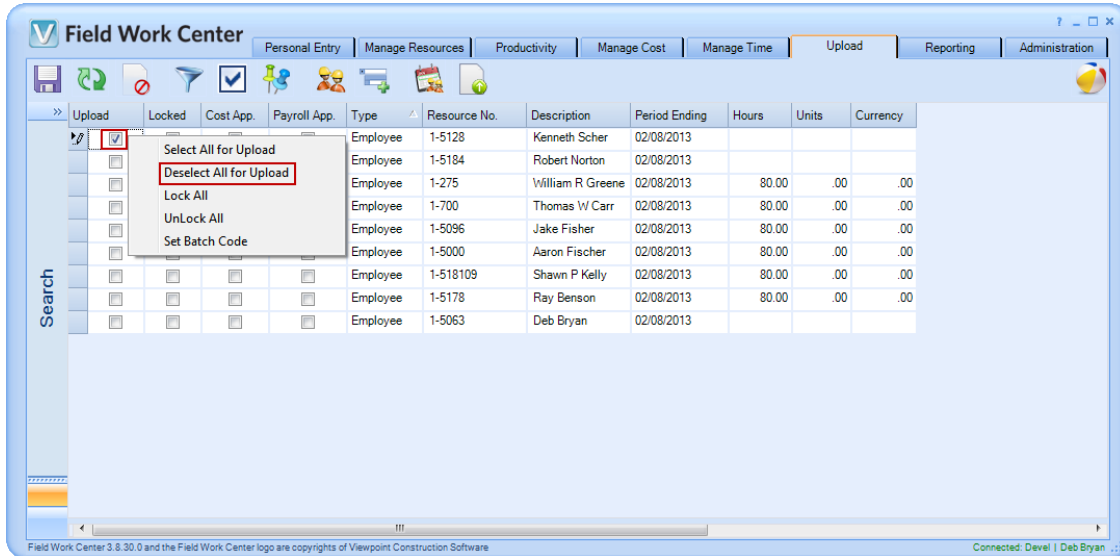


2. Click **Refresh** . The following screen appears.



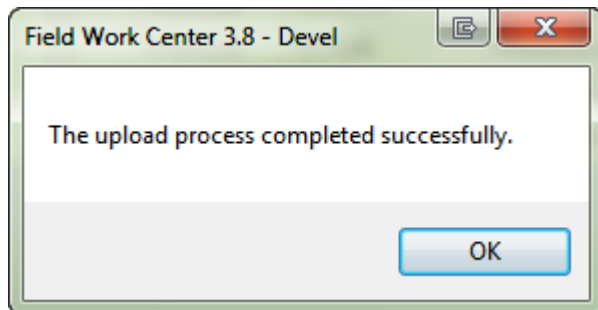
3. Click the **Minimize the Navigation Pane**  icon to hide the filter criteria, making more room on the screen for detail records.

At this point, select a Payroll user from the class to come up to the hot seat. Have the user **add** and **change records**, and review notes.

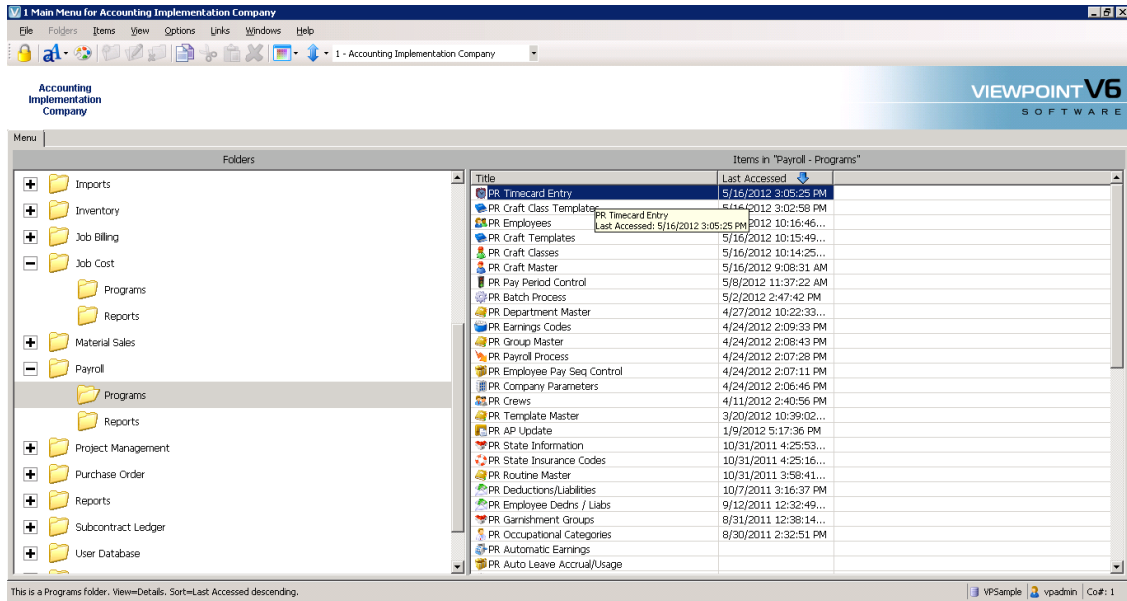


4. **Right click** anywhere on the screen to show **Select All for Upload**. Then click on **Deselect All for Upload**.
5. Check the **Upload** box for ONE record and click the **Upload Selected Records** icon to upload data to Viewpoint.

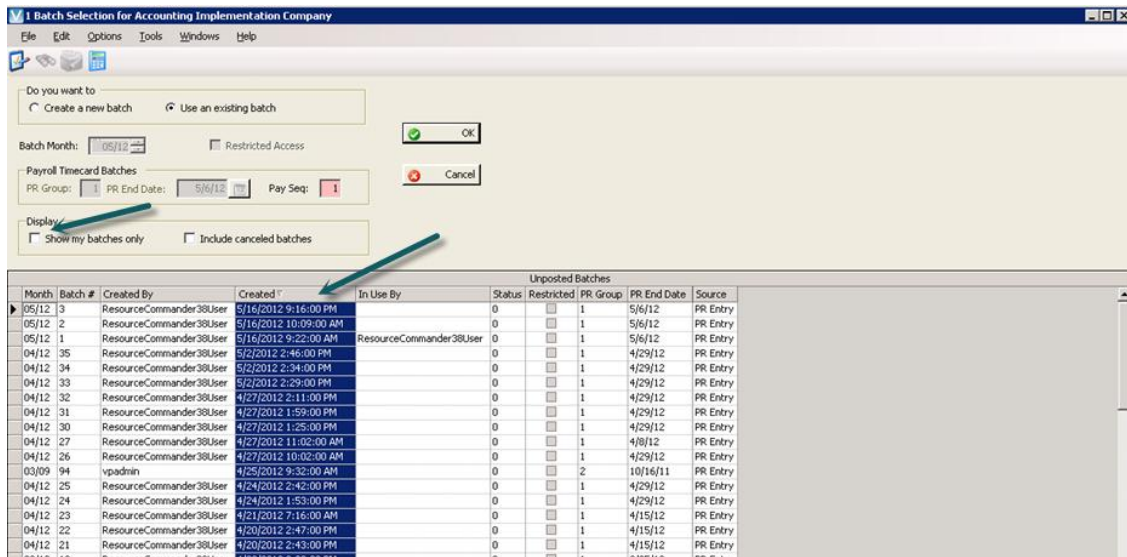
After the upload, the following screen appears:



- Have the user log in to Viewpoint and select PR Timecard Entry.



- Uncheck the **Show my batches only** box, and then sort to find your batch. Note that the batch comes over as having been created by "ResourceCommander38User".



8. Review the uploaded payroll transaction with the payroll clerks.

1 PR Timecard Entry for Accounting Implementation Company

File Edit Records View Options Tools Windows Help

Month: 05/12 Batch #: 3 PR Group: 1 Field Payroll Pay Period Ending Date: 5/6/12

Seq: 1

**CERTIFIED JOB**

Employee Date Totals		Employee Pay Period Totals		Job Pay Period Totals	
Reg:	1.00 0.00	Reg:	1.00 0.00	Reg:	6.00 135.00
OT:	0.00 0.00	OT:	0.00 0.00	OT:	0.00 0.00

Type: Thompson, A Date: 4/30/12 Job: Bronx Job Phase: Structural Steel

Batch/Seq	Copy (0-2)	Employee	Type	Action	Date	Pay Seq	PR	Crew	JC Co	Job	(0) Phas	Ins State	Tax State	Local	Unemp	Ins Code	GL Co	Craft	Class	(1) E	Shift	Rate	Hours
1		20286	3 - Job	A-Add	4/30/12	1	1		1	0700+	051000-	CA	CA		CA	5606	1	400	1206	1	1	1	1.00

Enter 0, 1, 2 or + to use copy feature. Record 1 of 1 Grid Co#: 1