Deltek

Deltek ComputerEase Field™ 3.0

Administrator Guide

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Contents

Overview

ComputerEase Field™ is a software available from anywhere, on any device by accessing it either in a supported browser or mobile application. ComputerEase Field allows users working in the field to create entries that flow to the office for processing and update users on the item status. Access to capabilities in ComputerEase Field are controlled by permissions set in ComputerEase.

This product is designed for use on iOS or Android mobile devices such as phones or tablets and on supported browsers.

This document provides instructions for the configuration and use of ComputerEase Field.

> **Note:** The scope of this administrator guide is currently restricted to limited availability. The final content can change prior to the official release. Please use this guide for guidance only.

Features Not Yet Supported in the App

The following features are on the roadmap for future release but not yet available in the current app.

- Revision of Work Locations (Job, Shop, Travel). However, Work Locations can still be driven from the ComputerEase through the Category level.
- Non-taxable and Other Pay types
- Service Management
- Fleet and Asset Service Orders
- Splitting Expenses across cost areas
- Location tracking outside of a Time Entry Record
- Offline entries

Prerequisites

You need the following before you can use ComputerEase Field:

License for Time, Expense, or Project Management capabilities

ComputerEase 24.2 or higher

- Active CE Live installation (See link for instructions.)

Mobile Device Requirements

The ComputerEase Field application supports mobile devices (phones or tablets) that run on the following operating systems:

- iOS Apple mobile devices (phone or tablet) version 12 or higher
- Android mobile devices (phone or tablet) version 11 or higher

Browser Requirements

To ensure access to all supported features in the browser interface of ComputerEase Field, it is recommended you always use the latest versions of the supported browsers.

The following browsers are supported by ComputerEase Field:

- Chrome
- Firefox
- Microsoft Edge
- Safari

Activating ComputerEase Field Users

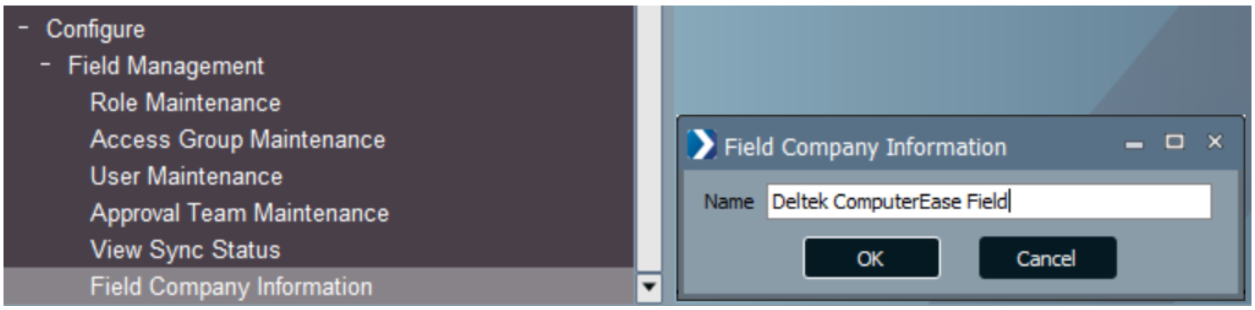
To establish a connection to the API communication tunnel between ComputerEase Field and ComputerEase, CE Live needs to be running. (See link for instructions)

The following items need to be configured to begin using ComputerEase Field.

Company Information

To view company information, click **Configure » Field Management » Field Company Information**.

The Name displayed here is the company name the app user will see when selecting the company to perform entries. This is a required step.



Role Maintenance

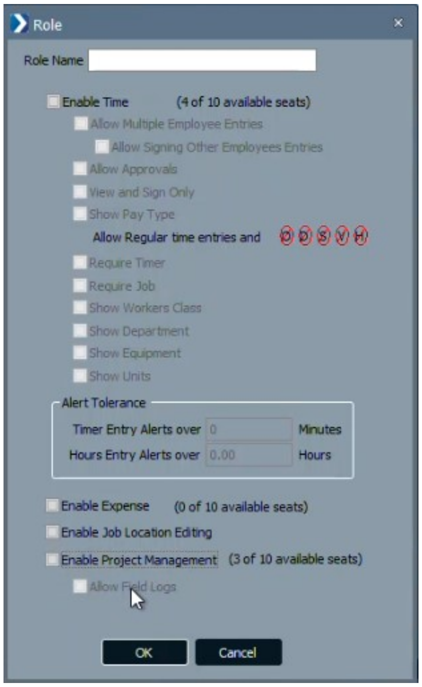
Roles define what capabilities a user can utilize (Time, Expense, or Project Management) and their permissions within those areas. At least one Role is required and will be assigned in User Maintenance.

Examples of Roles might be:

- Field Employee
- Foreman
- Project Manager

To create Roles and configure settings for these Roles, click **Configure » Field Management » Role Maintenance**.

When you create a Role, the number of available “seats” on your license will be displayed for Time, Expense, and Project Management. If enabling Time, Expense, or Project Management capabilities for a Role result in exceeding your available seats, you will be unable to save your changes.



After you create a Role, you need to configure the following fields:

- **Enable Time**: If you select this checkbox, users will be able to access the Time capability.
    - **Allow Multiple Employee Entries**: If you select this checkbox, users will be able to enter time for both them and other employees.
    - **Allow Signing Other Employees Entries**: This checkbox is available if **Allow Multiple Employee Entries** is selected. This allows a foreman, crew leader, or project manager to sign for other employees if they do not have access to sign for themselves.
    - **View and Sign Only**: If you select this checkbox, the user can't add and edit time entries, but only view and sign time entries when logged into ComputerEase Field.
    - **Show Pay Type**: The default is Regular time; however, you can allow or disallow entry of Overtime (O), Doubletime (D), Sick (S), Vacation (V), and Holiday (H).
    - **Require Timer**: If you select this checkbox, employees will be required to provide a start and stop time to create entries.
    - **Require Job**: If you select this checkbox, a job number will be required for all entries.
    - **Show Workers Class**: If you select this checkbox, the Workers Class will be displayed and can be changed by the user.
    - **Show Department**: If you select this checkbox, the Payroll Department will be displayed and can be changed by the user.
    - **Show Equipment**: If you select this checkbox, Equipment usage and hours will be able to be entered. (Note: Equipment Operator settings found in Employee Maintenance could affect this capability.)

    > **Note:** Equipment Operator settings found in Employee Maintenance could affect this capability.

    - **Show Units**: If you select this checkbox, Units will be visible and can be entered by the user.
    - **Alert Tolerance** section: Use this section to configure tolerance settings for time entries in minutes and hours for ComputerEase Field. Based on the tolerance setting, an alert is received by the ComputerEase Field user based on the difference of time entries recorded by ComputerEase Field and the time entries submitted by a user.
- **Enable Expense**: If you select this checkbox, users will be able to access the Expense capability.
- **Enable Job Location Editing**: If you select this checkbox, users will be able to perform geolocation and geofence revisions.
- **Enable Project Management**: If you select this checkbox, you will be able to enable the available Project Management features
    - **Allow Field Logs**: If you select this checkbox, users will be able to create and view Field Logs.

Understanding Job Locations:

When you initially create a geolocation for a Job, and there is an address within ComputerEase (Create/Edit a Job), ComputerEase Field will attempt to pin that location as the jobsite. If the ComputerEase Field user is allowed, the user can adjust the pin as necessary, so employees are notified when entering the geofence area. (See **Role Maintenance » Enable Job Location Editing** for instructions.) All geolocations are initialized and configured in ComputerEase Field. An address is not required in ComputerEase in **Job Costing System » Job Maintenance » Create/Edit a Job** to utilize geolocations.

> **Note:** If you were an existing ExpenseEase user, an Expense Role was created automatically. Once you have created your own specific Roles and assigned them to your users, you may delete the "Expense" Role, if needed.

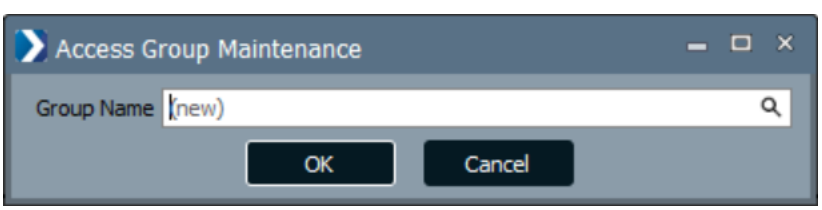
Access Group Maintenance

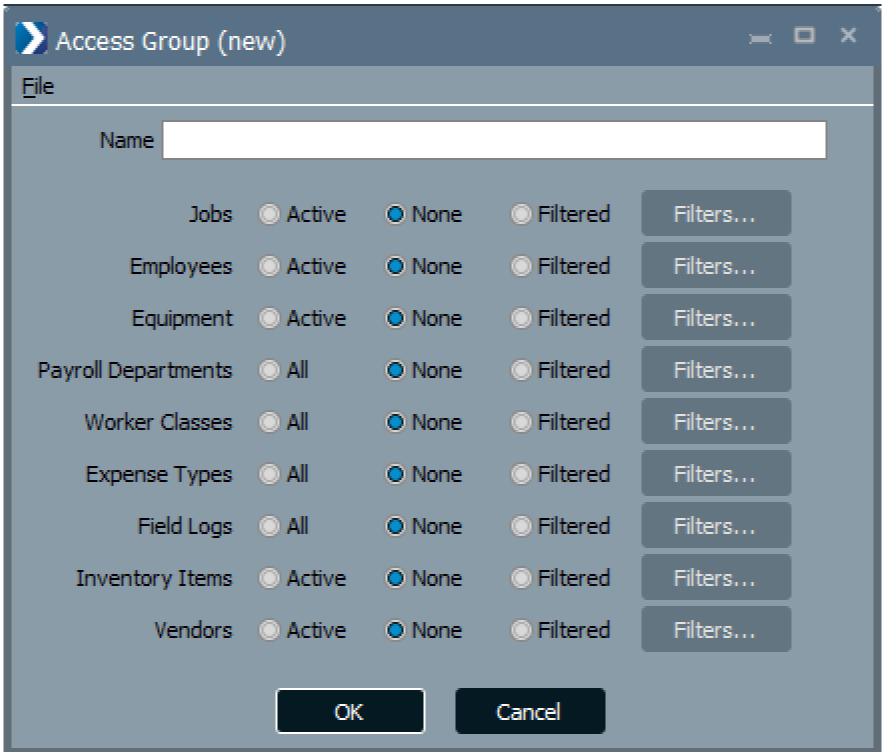
Access Groups define which data sets ComputerEase Field users can access. One or more Access Groups can be assigned to a User.

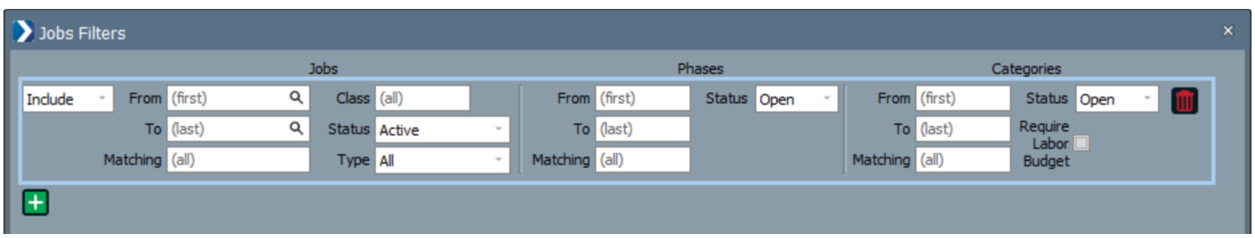
To create and configure Access Groups, click **Configure » Field Management » Access Group Maintenance**.

The Access Groups you create and assign will control the information available for the user within the application. Access Groups can be unique to your organization. Possible examples of Access Groups could represent trades, departments, crews, or other criteria that separate data viewing for users. At least one Access Group is required and will be assigned in **Configure » Field Management » User Maintenance**.

To create a new Access Group, click **OK** when **(new)** is displayed in the **Group Name** field.







Selecting the **Filtered** option allows you to identify which records to Include or Exclude. Multiple entries of Include and Exclude criteria can be created within a single Filter by clicking on the Green + button.

- **Jobs**: Specify Jobs a user can look up and select
  - Active: All Jobs with Active status
  - None: A user would be unable to look up and select Job items
  - Filtered: Include or Exclude items based on the following:
    - Jobs:
      - From Job and To Job Numbers; single or range
      - Matching; Jobs ID's that contain specific characters (i.e. 24**** for all job numbers that begin with 24, **WB**, etc.)
      - Class; all or specific (from Create/Edit a Job)
      - Status; All, Active, Inactive, Closed, Active+Inactive, Inactive+Closed
      - Type; All, T&M, Non T&M (jobs with phases and or categories)
    - Phases:
      - From Phase and To Phase ID: single or range

            - Matching; Phase ID's that contain specific characters
            - Status; All,Open,Closed
        - Categories:
            - From Category and To Category ID: single or range
            - Matching; Category ID's that contain specific characters
            - Status; All, Open, Closed
            - Checkbox for Require Labor Budget
- **Employees:** Specify Employees a user can look up and select
    - Active: All Employees with Active status
    - None: A user would be unable to look up and select any Employee
    - Filtered: Include or Exclude items based on the following:
        - From Emp to To Emp ID
        - From Location and To Location (Employee Maintenance)
        - Status: Active, Inactive, All
- **Equipment:** Specify Equipment a user can look up and select
    - Active: All items with Active status, all billing classes, all value classes
    - None: A user would be unable to look up and select Equipment
    - Filtered: Include or Exclude items based on the following:
        - From Equip and To Equip ID
        - Fleet Codes Matching; Fleet Code ID's that contains specific characters
        - Status; All, Active, and Inactive
        - From Code to Code (Equipment Code Maintenance)
        - Code Types; Revenue, Cost to Own, Cost to Operate
- **Payroll Departments:** Specify Payroll Departments a user can look up and select
    - All: Indicates the user can look up and select all Payroll Departments
    - None: A user would be unable to look up and select any Payroll Departments
    - Filtered:
        - From Code and to Code
- **Worker Classes:** Specify Workers Classes a user can look up and select
    - All: Indicates the user can create and view all Worker Classes
    - None: A user would be unable to look up and select any Worker Classes
    - Filtered:
        - Type; Non-Union, A Specific Union, All Unions, Non-Union + All Unions
        - If a Specific Union is selected as a Type, the Union can be assigned
        - From Class to Class
- **Expense Types:** Specify Expense Types a user can look up and select

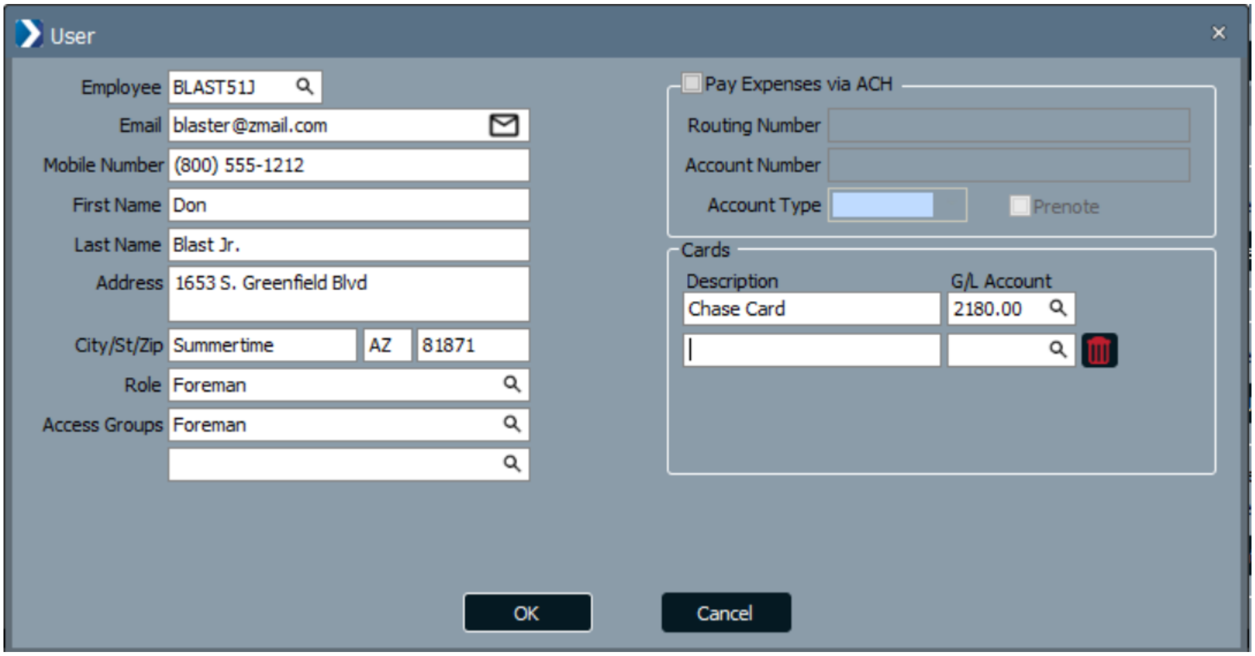
- All: Indicates the user can create and view Expense types for all types.
- None: A user would be unable to look up and select any Expense types.
- Filtered:
  - Checkboxes for Equipment, Fuel, Lodging, Material, Meals, Mileage, Misc, and Transportation

- **Field Logs**: Specify the types of Fields Logs a user is able to create and view
  - All: Indicates the user can create and view Field Logs for all types.
  - None: A user would be unable to look up and select any Field Log types.
  - Filtered:
    - From Type and To Type
    - "From Date" defaults to 90 days prior and controls the volume of historical Field Logs that will be sent to Field for viewing.
    - "Include Blank Type" checkbox for legacy users
- **Inventory Items**: Specify the Inventory Items a user can look up and select
  - Active: All items with Active status, all billing classes, all value classes.
  - None: A user would be unable to look up and select Inventory Items
  - Filtered:
    - From Item and To Item ID
    - From Class and To Class
    - Status: All, Active, Inactive
    - Billing Class: Checkbox options for Labor, Material, Services, and Other
    - Value Class: Checkbox options for G/L, Non G/L, and Intangible
- **Vendors**: Specify the vendors a user can look up and select
  - Active: All Vendors with Active status.
  - None: A user would be unable to look up and select Vendors
  - Filtered:
    - From Vendor and To Vendor ID
    - Status: All, Active, Inactive
    - Checkbox selection for Suppliers, Subcontractors, and Other

User Maintenance

A User must be created for an individual to access ComputerEase Field.

> **Note:** To determine the capabilities for a user, each user must be assigned at least one Role (defines capabilities), along with at least one Access Group (identifies desired data available to the user).



To create a User, go to **Configure » Field Management » User Maintenance** and enter details and configure access rights.

- **New User**: Click this button to create a new User and enter the following information:
  - **Employee**: Assigning a ComputerEase Employee ID to a ComputerEase Field user links the user for payroll processing. As a result, time history from previous payrolls will automatically transfer for the Employee ID assigned. This allows the ComputerEase Field user to view time entries for 12 months of past processed payrolls such as hours and job distribution, and no rate information.

    After selecting an employee, you will be prompted with the option to auto-populate the Email, Mobile Number, and address from the Employee Maintenance record.

    > **Note:** An Employee ID may be assigned to one User only.
    >
    > If you entered an incorrect employee ID, changing the employee ID removes the time history transferred prior and provides the User with the new employee time history.

  - **Email**: Enter the email address in which invitation correspondence will be sent. This field is required.
  - **Mobile Number**: Enter the mobile phone number for the user to use for login and receive SMS text verification codes. This is an optional field.
  - **Role**: Select a role for the User. A single Role is required for each User.

    > **Note:** Roles define what capabilities users can use (Time and or Expense) and their permissions within those areas.

  - **Access Groups**: Select an Access Group for the User. At least one Access Group is required for a User; however multiple groups can be assigned.

> **Note:** Access Groups define which data ComputerEase Field users can access.

- **Invite User**: After you create a new User, you need to invite the User to use the application. To do this, highlight the user and select **Invite User**. Inviting a User changes the User Status to **Not Verified**. The User will be sent an email containing ComputerEase Field download instructions to the email address in User Maintenance. Once they have successfully logged in to ComputerEase Field the Status will change to **Active** in ComputerEase.

- **Edit User**: Click this button to revise details of existing Users.
- **Disable User**: Click this button to disable the User access to ComputerEase Field for this company. Disabling a User also frees up a seat for Time and or Expense as enabled in the user's assigned role.

> **Note:** Available seats for both Time, Expense, and Project Management Users are verified when changes are made through Role Maintenance and User Maintenance:
>
> - Changing an existing Role that is assigned to Users could result in exceeding available seats.
> - Assigning a Role to a User could result in exceeding available seats.
> - To confirm who is holding the seats in use, you can click **View Time Users**, **View Expense Users**, or **View Project Mgmt Users** to see a list of users that are enabled for each capability.

View Sync Status

To ensure that your API connection is active and syncing properly, click **Configure » Field Management » View Sync Status**. The last sync start and stop times, as well as a verification of record and error counts will be displayed. If you do not see **View Sync Status** on your **Field Management** menu, log in with your **Password Maintenance** and ensure **Field Management » View Sync Status** is selected.

If you do not see sync statistics in **View sync Status**, Deltek recommends you stop and restart CE Live to initiate synchronization. **View Sync Status** will not populate until at least one Access Group is established.

> **Note:** The initial sync at the time of activation may be delayed due to the high volume of information passing through the API. This initial delay could be as much as 15 minutes or more.

User Authentication

The method of authentication used to log into ComputerEase Field app is determined by the method selected by the user during initial login. (See link for instructions)

If the user has a fingerprint, face ID, or passcode set up on the device, the user can choose to activate device authentication when accessing the app. Deltek highly recommends users to use device authentication, so they do not have to re-authenticate every 24 hours.

ComputerEase Field Time

Configure Alerts for Tolerance Settings

Alerts are generated in ComputerEase Field for entries that exceed the tolerance specified. The tolerance is calculated from the difference of the geo arrival time or departure time entries, or both compared against the submitted time entries of a user.

To configure an alert for tolerance settings:

1. Click **Configure » Field Management » Role Maintenance**.
2. In the Role Maintenance window, click **New Role** or **Edit Role**.
3. In the **Time Entry Alerts over** field, enter a whole number in minutes for ComputerEase Field users who are entering start and stop times.
4. In the **Hours Entry Alerts over** field, enter a value in hours, up to 2 decimal places for ComputerEase Field users who are not entering start and stop times.
5. Click **OK**.

Note: When you leave the **Time Entry Alerts over** field and **Hours Entry Alerts over** field blank, an alert is received for all entries. To avoid receiving unnecessary notifications, enter a value greater than 0.

Approval Team Maintenance

You can create an Approval Team and add users in the team as approvers of time entries from ComputerEase Field. Approval Teams are assigned to Jobs through **Create/Edit a Job** on the Payroll tab. When time is entered for a Job in ComputerEase Field, the members of the assigned Approval Team will receive a visual indicator in ComputerEase Field that there are entries awaiting their approval.

When a member of the Approval Team approves a Time Entry through ComputerEase Field, the time will automatically flow to the Time Center in ComputerEase, and the app status will change to “Approved”. Approvers may also reject entries requiring an employee to edit and resign their entry.

To access **Approval Team Maintenance**, click **Configure » Field Management** to display the Approval Teams window.

Create an Approval Team

To create an approval team:

1. In the Approval Teams window, click **New Team** to display the Team dialog box.
2. In the **Name** field, enter the name of the approval team and then, click **OK**.
3. In the Users - Lookup window, select the users you want to be part of the new approval team.
4. Click **Close**.

Note: When you exit the Approval Teams window or click **Done** with an approval team without a single member added to the team, a Warning dialog box is displayed.

Edit an Approval Team

To edit an approval team:

1. In the Approval Teams window, select an approval team.
2. Click **Edit Team** to display the Team dialog box.
3. In the Team dialog box, edit the name of the team.
4. Click **OK**.

> **Note:** When you edit the name of the approval team, the updated name is also reflected on the Payroll tab of the Job Code window (**Job Costing System » Job Maintenance » Create/Edit a Job**).

Edit Multiple Approval Teams using Create/Edit a Job

To add and edit multiple approval teams for a job:

1. Click **Job Costing System » Job Maintenance » Create/Edit a Job**.
2. In the Create/Edit a Job dialog box, click **File » Edit Approval Teams**.
3. In the Add Jobs dialog box, use the following fields as needed to add and filter multiple jobs:
   - **Customer**
   - **Job Class**
   - **Job Status**
   - **From Job**
   - **To Job**
4. Click **OK**.
5. In the Edit Approval Teams window, use the following buttons as needed to select multiple jobs for editing;
   - **Add Jobs**: Provides filter options to call the jobs you wish to view, edit, or modify
   - **Select All**: After jobs were called through Add Jobs, Select All selects the checkboxes for the jobs where your Approval Team changes will apply.
   - **Select None**: Clears all checkboxes for selected jobs.
   - **Selection Approval Team**: Selects the Approval Team to be applied to the selected jobs.
   - **Save**: Saves changes to apply your changes.

     > **Note:** Pending time entries are redirected to the appropriate Approval Team.

   - **Cancel**

Delete an Approval Team

To delete an approval team:

1. In the Approval Teams window, select an approval team.
2. Click **Delete Team** to display the Verify Delete dialog box.
3. Complete one of the following actions:
   - In the **Team** field, perform a lookup and select a team to reassign the job approvals to.
   - Select **No Approval Team**.
4. Click **Yes**.

Add Members to an Approval Team

To add members to an approval team:

1. in the Approval Teams window, select an approval team.
2. Click **Add Member(s)**.
3. In the Users - Lookup window, select the users you want to be part of the new approval team.
4. Click **Close**.

Remove a Member from an Approval Team

To remove a member from an approval team:

1. In the Approval Teams window, select a member of approval team.
2. Click **Remove Member**.

> **Note:** When you exit the Approval Teams window or click **Done** with an approval team without a single member added to the team, a Warning dialog box is displayed.

ComputerEase Field Time Entry Flow to ComputerEase

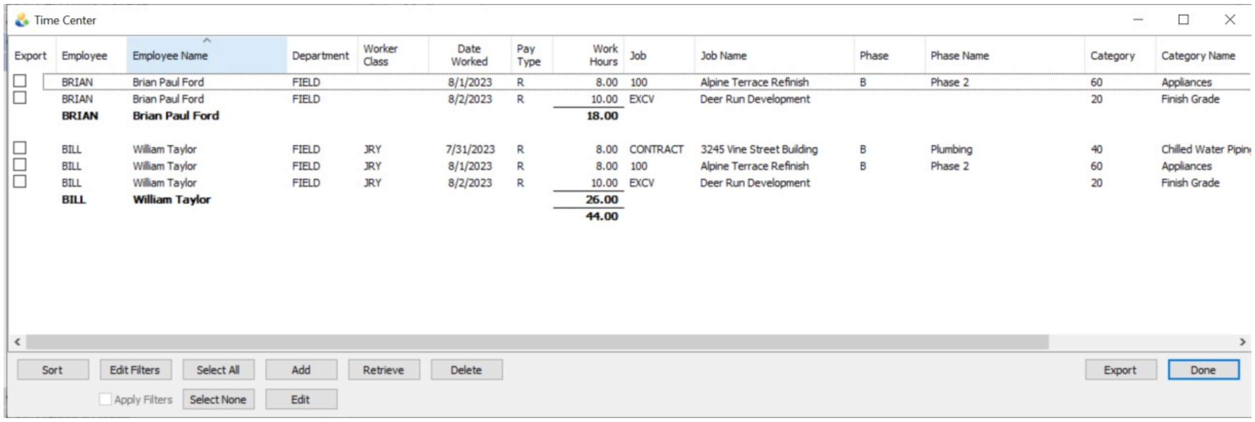
The following is the typical flow of signed ComputerEase Field entries:

ComputerEase Field → Time Center → Labor Distribution

Time Center

The Time Center serves as a centralized hub where ComputerEase Field time entries flow to be reviewed and edited before exporting them into Labor Distribution. When time entries from ComputerEase Field are signed by the employee, they will be available in ComputerEase, under **Payroll System » Time Center**.

The Time Center allows the ComputerEase user to review and edit signed ComputerEase Field entries for accuracy in a customized view before exporting them to Labor Distribution for payroll processing.



Time Center

Export	Employee	Employee Name	Department	Worker Class	Date Worked	Pay Type	Work Hours	Job	Job Name	Phase	Phase Name	Category	Category Name
☐	BRIAN	Brian Paul Ford	FIELD		8/1/2023	R	8.00	100	Alpine Terrace Refinish	B	Phase 2	60	Appliances
☐	BRIAN	Brian Paul Ford	FIELD		8/2/2023	R	10.00	EXCV	Deer Run Development			20	Finish Grade
	BRIAN	**Brian Paul Ford**					**18.00**						
☐	BILL	William Taylor	FIELD	JRY	7/31/2023	R	8.00	CONTRACT	3245 Vine Street Building	B	Plumbing	40	Chilled Water Pipin
☐	BILL	William Taylor	FIELD	JRY	8/1/2023	R	8.00	100	Alpine Terrace Refinish	B	Phase 2	60	Appliances
☐	BILL	William Taylor	FIELD	JRY	8/2/2023	R	10.00	EXCV	Deer Run Development			20	Finish Grade
	BILL	**William Taylor**					**26.00**						
							44.00						

The completion of ComputerEase activities will update the status and editing capabilities in ComputerEase Field.

- **Pending**: This status indicates that the entry is not yet signed and can be edited in ComputerEase Field. The entry is not yet visible in ComputerEase.
- **Signed**: This status indicates that the entry has been signed and is awaiting approval by a member of the Approval Team assigned to the job. If no Approval Team has been assigned to the Job, the status will move to Approved when signed). Signed entries can be edited if needed.
- **Approved**: This status indicates that the entry has been approved and is ready to be viewed in the Time Center.
- **Retrieved**: This status indicates that an entry has been viewed in ComputerEase through the Time Center. The Retrieved status occurs when signed entries have been viewed in the Time Center or unsigned entries have been manually retrieved into the Time Center. Retrieved entries cannot be edited in ComputerEase Field.
- **Processing**: This status indicates that the ComputerEase Field entry has been exported to Labor Distribution. The entry is not editable in ComputerEase Field or the Time Center.
- **Processed**: This status indicates that the Payroll processing is complete. The entry is not editable in ComputerEase Field and is no longer available in Time Center or Labor Distribution.
- **Voided**: This status indicates that the Payroll check was voided. The original entry will display as zeros in ComputerEase Field .

Customizing the Time Center

The Time Center view can be customized and retained by a ComputerEase user.

- Selecting Columns to Display
  - Drag and drop column headings to reorder columns.
  - Right-click in the header row to view available fields and select/de-select columns to display.
  - Created by and Approved are optional fields for display.
- Sorting and Subtotaling
  - Clicking a column heading creates an ascending sort. A second click changes the sort to descending.
  - The **Sort** button allows additional sort criteria to be defined, the order of sorting to be performed, and the ability to turn subtotals on/off.

- Filtering Entries
  - Clicking **Edit Filters** allows you to select the specific entries you would like to view:
    - Date Worked
    - Employee
    - Job
    - Phase
    - Category
    - Pay Period
    - Include Labor Distribution: When this is selected, entries that reside in labor distribution from a Time Center Export or entered through Labor Distribution functions can be viewed. This can be especially helpful if you are attempting to verify hours for an entire week, and so on.
  - Apply Filters allows you to quickly turn on/off record Filters.
- Editing Entries
  - Double-click an entry to edit it or highlight the entry and click **Edit**.
- Adding Entries
  - Time entries may be manually added in Time Center by clicking **Add**.
- Deleting Entries
  - Highlighting a record and clicking **Delete** will allow you to remove a record.

> **Note:** Edits, additions, and deletions that occur in Time Center or Labor Distribution will be written back to ComputerEase Field when the payroll process is completed. The original submitted ComputerEase Field information will be maintained for future reporting. Deleted entries will display as 0 (zero) hours in ComputerEase Field.

- Retrieving Entries
  - The **Retrieve** button allows you to manually pull entries from the Field application that have not yet been signed. Leaving the **Employee** field blank selects all employees or, you can select a single employee for retrieval. When you are retrieving time for all employees or a single employee, the first **Date Worked** is optional. However, **To Date Worked** is required.
- Saving Entries for Future Export
  - Clicking **Done** saves any changes and the Export status of the entries displayed so Export can be done at a later time.

Labor Distribution

ComputerEase Field entries flow from the app into the Time Center and require export into Labor Distribution for payment processing. If Time Center entries need revision after export into Labor Distribution, they may be edited or deleted as needed. Changes will flow back to ComputerEase Field when payroll processing is finalized.

Export Entries to Labor Distribution

To export entries from the Time Center to Labor Distribution:

1. Select entries to export by completing one of the following actions:
   - To select an individual record, select the checkbox under the **Export** column.
   - To select a range of records, hold down the SHIFT key and click the desired records. And then, select the checkbox under the **Export** column.
   - To select all records visible in the Time Center, click **Select All**. To clear the **Export** checkbox for all records, click **Select None**.
2. Click **Export** to push the selected Time Center entries to Labor Distribution.

   A prompt for selection of the "Payroll" desired will display and is required. When Time Center entries have been successfully exported, the **Export** checkbox becomes disabled. The option to display or hide exported entries is available in Edit Filters.

> **Note:** Entries will remain available for viewing in the Time Center until the payroll process has been completed for Exported entries. As with Labor Distribution, when the payroll is posted, the exported entries will no longer display.

Labor Distribution with Signature Report

Comparing the entries as they originated in ComputerEase Field against the Labor Distribution revisions is easily performed by generating the **Payroll System » Labor Distribution Report » by Employee with Signature**. This report provides images of employee signatures along with a calculated difference between hours submitted and hours pending payment. Including the Job Name on the report is an optional prompt. The **Entry Source** column identifies the origination of an entry:

- **Field**: The entry originated in ComputerEase Field.
- **Manual**: The entry originated from a manual entry in Labor Distribution.
- **Automatic**: This was a system-calculated adjustment (automatic overtime).
- **FieldEase**: The entry was imported from FieldEase.
- **3rd Party**: The entry was imported from a file.

This report is a temporary report, and information will be cleared when Payroll is posted (as do other Labor Distribution Reports). Deltek recommends saving as a PDF. The Creator and Approver of ComputerEase Field entries will also be displayed on the report.

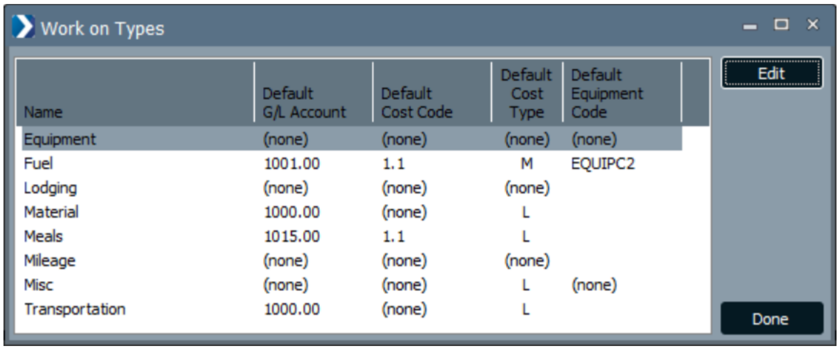
Labor Distribution with Signature Report

Date	Start	End	Pay Type	Workers Class	Hours	Date	Pay Type	Workers Class	Pay Hours	+ / -	Cost Code	Job Name	Entry Source
			Entries from FIELD			Labor Distribution							
BILL - William Taylor													
7/31/2023			Reg	JRY	8.00	7/31/2023	J Reg	JRY	8.00		CONTRACT.B.40	3245 Vine Street Building	Field
8/1/2023			Reg	JRY	8.00	8/1/2023	J Reg	JRY	8.00		100.B.50	Alpine Terrace Refinish	Field
8/2/2023			Reg	JRY	10.00	8/2/2023	J Reg	JRY	10.00		EXCV.20	Deer Run Development	Field
			Reg		26.00		Reg		26.00				
Totals for William Taylor			Reg		26.00		Reg		26.00				
			All		26.00		All		26.00				
BRIAN - Brian Paul Ford													
8/1/2023			Reg		8.00	8/1/2023	J Reg		8.00		100.B.50	Alpine Terrace Refinish	Field
8/2/2023			Reg		10.00	8/2/2023	J Reg		10.00		EXCV.20	Deer Run Development	Field
			Reg		18.00		Reg		18.00				
Totals for Brian Paul Ford			Reg		18.00		Reg		18.00				
			All		18.00		All		18.00				
		Total	Reg		44.00	Total	Reg		44.00				
		Total	All		44.00	Total	All		44.00				

ComputerEase Field Expense

After you have created Users, Roles, and Access Groups, proceed to **Accounts Payable » Expense Management » Work on Types**.

Expense Types are predefined categories that have the option for default G/L Accounts, cost codes, and job cost type, Equipment, and Equipment Cost Type. While not required, using defaults can ensure accuracy and streamline the editing process for classifying Expense entries from ComputerEase Field.



When ComputerEase Field Expense entries are created, the user must either choose **Personal Expense** or select a company **Card** based on the options defined in **User Maintenance**.

Edit Type Information

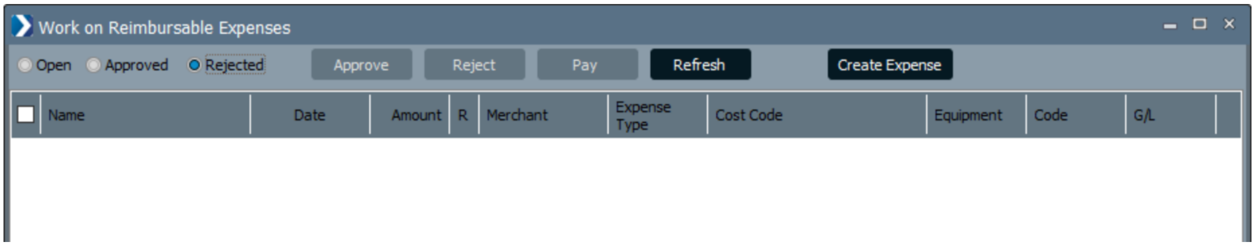
To edit type information:

1. In the Work on Types window, select a type and click **Edit**.
2. In the Type Information dialog box, use the following items as needed:
   - **Default Account**

     > **Note:** Beside **Default Account** is the **Allow J/C Dept Override** checkbox. When you create an expense using the expense type with the **Allow J/C Dept Override** checkbox selected, the Account field in the Expense window (**Accounts Payable » Expense Management » Work on Reimbursable Expense or Work on Non-Reimbursable Expenses**) is automatically filled with the general ledger account information.

   - **Default Phase**
   - **Default Category**
   - **Default Cost Type**
   - **Default Equipment Code**
3. Click **OK**.

Work on Reimbursable Expenses

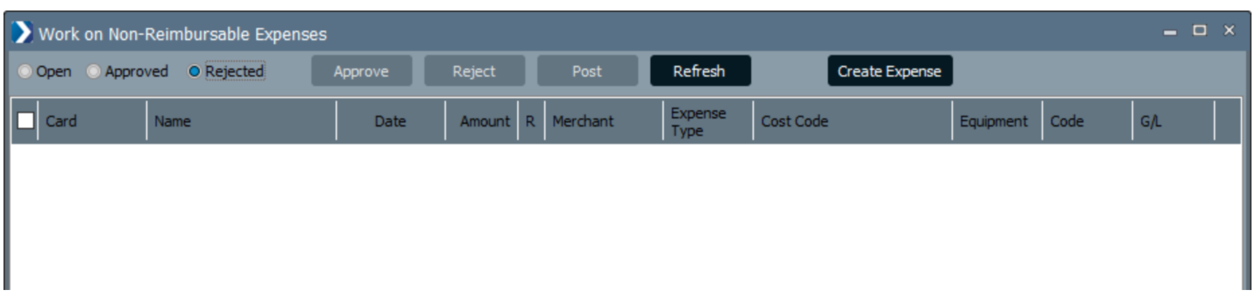


If an expense was submitted as a **Personal Expense** through ComputerEase Field, the entry will flow into **Accounts Payable » Expense Management » Work on Reimbursable Expenses**. Selecting the dials in the header will display entries by status:

- **Open**: This status shows pending entries awaiting approval, rejection, and payment. Double clicking on the transaction will allow you to edit the distribution of the expense and view the receipt image. Approvals may be performed from the summary or detail window so they may be paid. Rejections may also be performed from the summary or detail windows. after an Open entry has been Approved or Rejected, it will show in the appropriate window.
- **Approved**: This status shows Approved Entries which are ready to be paid.
- **Rejected**: This status shows Rejected Entries in Expense and in ComputerEase Field Expense. Rejected entries will need to be resubmitted through ComputerEase Field Expense.

Approving, rejecting, and paying can be performed in the Summary window by selecting one or more entries and clicking the appropriate button, or individually within the detail view of the entry. When selecting the option to pay, you will be prompted with a payment window to pay either by check or if applicable by ACH. Expenses paid by ACH are finalized through **Accounts Payable » Process ACH Payments**.

Work on Non-Reimbursable Expenses



If an expense was submitted as a **Card**, the entry will flow into **Accounts Payable » Expense Management » Work on Non-Reimbursable Expenses**. Selecting the dials in the header will display entries by status:

- **Open**: This status shows pending entries awaiting approval or rejection. Double clicking on the transaction enables you to edit the distribution of the expense and view the receipt image. Approvals may be performed in the summary or detail window. Rejections may also be performed In the summary or detail window. After an open entry is approved or rejected, they will show on the appropriate window.
- **Approved**: This status shows Approved Entries ready to be posted. After an Expense entry has been Approved, do not forget to post the transactions by selecting them and clicking **Post**. Posting sends the expense to Job Cost and the General Ledger.

- **Rejected**: This status shows Rejected Entries. Rejected Expenses need to be recreated and resubmitted through ComputerEase Field Expense.

Approving or rejecting can be performed on the Summary window by selecting on or more entries and clicking the appropriate button, or individually on the detail view of the entry.

Create Expense for Work on Reimbursable and Non-Reimbursable Expenses

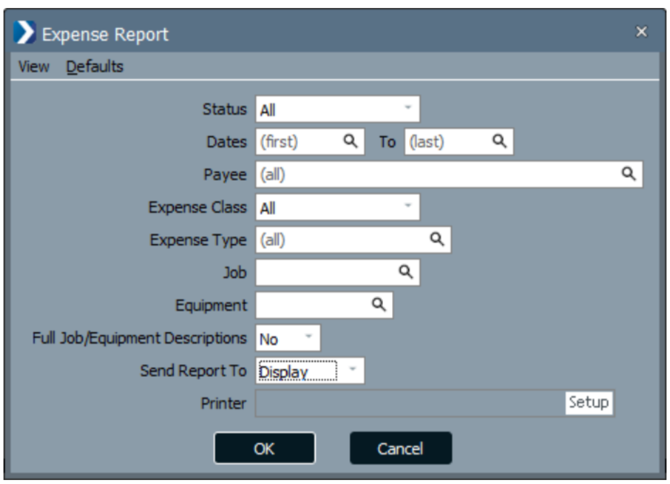
In the Work on Reimbursable Expenses window or Work on Non-Reimbursable Expenses window (**Accounts Payable** » **Expense Management** » **Work on Reimbursable Expenses** or **Work on Non-Reimbursable Expenses**), you can add expenses directly into ComputerEase using **Create Expense**.

You can click **Create Expense** to display the Expense window where you can do the following:

- Specify expense information such as user, merchant, cost code, and equipment information
- Add PDF and JPG files such as receipts
- Approve or pay the created expense

Expense Report

Reviewing pending and processed expenses can be performed by generating the Expense Report. There are many filters that allow you to customize the data you view.



Project Management

Field Logs

Field Log Type Maintenance

You can configure the desired information for Fields Logs for use in ComputerEase Field.

Configure Field Log Sections and Fields

Depending on the field log information you want your users to record, you can enable and disable sections for information in a field log using ComputerEase for ComputerEase Field. You can have many different Field Log Types; (i.e. Daily Production Logs, Injury Reports, Equipment Checklists, Safety Training Logs, etc.). You can define the information you want to collect, and the order you would like the information to be collected/presented. You will need at least one Field Log Type defined.

1. Click **Document Management » Field Logs» Maintenance Programs » Field Log Type Maintenance**. In the Field Log Type Maintenance dialog box, specify a code for your **Field Log Type** field and click **OK**. (SAFETY, DAILY, etc.), then enter a **Description** to identify what the log represents.
2. Optional: In the Automation Defaults section, do one or more of the following:
   - Select the **Auto Equipment Import** checkbox to enable automatic import of equipment information in the Equipment section of a new Field Log. If this checkbox is not checked, the users in ComputerEase Field can still pull in Equipment usage entries by clicking the Refresh button in the section, but it will not come in automatically.
   - Select the **Auto Time Import** checkbox to enable automatic import of time information in the Employee section of a new Field Log. If this checkbox is not checked, the users in ComputerEase Field can still pull in Employee Time entries by clicking the Refresh button in the section, but it will not come in automatically.
   - Select an option in the **Production Update Default** field to assign a default status for Production submissions which will appear in the Field Log Production Updates window.
3. Optional: In the Enable and Order Sections section, select one or more of the following sections you want included on the Field Log. You may drag and drop the sections to define the entry and reporting section order.
   - **Weather**
   - **Employees**
   - **Subcontractors**
   - **Material**
   - **Equipment**
   - **Visitors**
   - **Productivity**
   - **Signatures (Web)**
   - **Notes**
   - **Additional Information**

- **Attachments**

4. Optional: In the Additional Information (User Defined Fields) section, select a user defined field (UDF) and click **Assign Section** to assign a section to the UDF. This allows you to specify the section you would like the field to appear, or [Not Used] if the field is not applicable to the Field Log Type. You may drag and drop the fields to define the entry and reporting order of the fields.
5. Click **OK** to save the Field Log Type.

User Permissions for Downloading New Field Logs into the Desktop

1. New Field Logs will flow into **Document Management » Field Logs » Field Log Management Center.** You may want to allow project managers to view Field Logs which have already been reviewed but disallow the ability to collect new unedited/reviewed Field Logs.

   To enable/disable downloads of field logs in the Desktop:
2. Log in to ComputerEase Field as PW MAINT user.
3. In the Password Maintenance window, select a user, and then, click **Edit User**.
4. In **Programs » Project Management » Document Management**, select the **New Field Log Download and Notifications** checkbox.
5. Click **OK**.

Field Log Management Center

Functionality

The Field Log program is designed to improve automation and reduce clicks not only in the field but at the Desktop. If user permissions allow, newly submitted Field Logs from Field will automatically populate the Desktop through the Management Center (no import step needed). The Management Center has also received the following enhancements:

- Newly submitted Field Logs from Field and new FieldEase imports will appear in bold indicating they are ready for Desktop Edit/Review. Once opened, the bold will be removed.
- Management Center allows Field Log filtering by User or Source to more easily view select entries by person, or by entry source.
- “Created By” [User Name] column, which displays either the Desktop ComputerEase User Name, or Field User Name.
- Source” [Entry method] column which displays the entry source of Field, FieldEase, or Desktop.
- For FieldEase Field Logs, the Batch column removed as the batch is now combined with the Source.

Desktop Edits of Field Logs

The password maintenance permissions for Editing a Field log in the Desktop are respected in the Management Center. We have enforced the following Edit and Delete rules:

- Once Field has submitted a Field log, the Field user is no longer able to edit it.
- Changes made to Field Logs at the Desktop will update the Field Log when viewed in Field, with the exception of attachments added at the Desktop.
- Desktop deletion of an entire Field Log created by Field is disallowed.

- Individual submitted Field Log records generated through Field may be edited at the Desktop, but not deleted.

Management Center Download Permissions

System Administrators can limit a user's ability to download newly submitted Field Logs into the Management Center through Password Maintenance (**Project Management » Document Management » New Field Log Download and Notifications**).

Field Log Production Updates Window

You can post production data to job costs using the **Field Log Production Updates** window. This feature provides similar functionality to **Job Cost System » Job Maintenance » Enter Units Complete**. However, the entries can be collected through ComputerEase Field > Field Logs.

To open the Field Log Production Updates window, go to **Document Management » Field Logs » Field Log Production Updates**. Access to this function is enabled through Password Maintenance by selecting **Programs » Project Management » Document Management » Field Log Production Updates**.

The Field Log Production Updates window allows you to review ComputerEase Field and Desktop Field Log production entries (New Units Completed, Cost to Finish, or Percent Complete). You can also select the Update behavior for a Field Log production entry:

- **Update Job Production**: Indicates you want this entry to update Job Cost.
- **No Job Update**: Indicates you do not want this entry to update Job Cost.
- **Hold for Review**: Indicates you are unsure of update status and want to maintain a “pending” status for future review.

Selecting records for Production status assignment:

- Click a single record and assign your desired update status. • [Shift] Click multiple records to select, then click the “Assign Selection Status” button and assign desired update status.
- Click the [Select All] button, then click the “Assign Selection Status” button and assign desired update status.
- [Deselect All] clears record selections.

When you have completed your Production Update assignments:

- **Save**: Does not perform any updates but closes the Field Log Production Updates screen, retaining record status for future editing and processing.
- **Save and Update**: The system will check for conflicting entries (e.g., multiple % completes for a task on the same day, phase, and category), and indicate conflicting entries with a red exclamation mark. You must change the status for the entries you wish to remove from update before proceeding.

Once conflict resolution is complete:

- “Update Job Production” records will post to Job Cost, lock the Production Entry from editing, and remove from future Production Update sessions.
- “Hold for Review” records will retain and display in future Field Log Production Update sessions.
- “No Job Update” records will be removed from future Production Update sessions.

Appendix: If You Need Assistance

If you need assistance installing, implementing, or using ComputerEase Field, Deltek makes a wealth of information and expertise readily available to you.

Customer Services

For over 30 years, Deltek has maintained close relationships with client firms, helping with their problems, listening to their needs, and getting to know their individual business environments. A full range of customer services has grown out of this close contact, including the following:

- Extensive self-support options through the Deltek Support Center.
- Phone and email support from Customer Care analysts
- Technical services
- Consulting services
- Custom programming
- Classroom, on-site, and Web-based training

Attention: Find out more about these and other services from the Deltek Support Center.

Deltek Support Center

The Deltek Support Center is a support website for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek’s knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

Attention: For more information regarding Deltek Support Center, refer to the online help available from the website.

Access Deltek Support Center

To access the Deltek Support Center:

3. Go to https://deltek.custhelp.com.
4. Enter your Deltek Support Center **Username** and **Password**.
5. Click **Login**.

> **Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

ComputerEase Resource Center

To view latest information about ComputerEase and ComputerEase Field, go to the ComputerEase Resource Center to view the following information:

- What's New:
- Community, Help, Guided Learning, and Events and Webinars
- Most Popular Learning Assets

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com