hh2 User Guide

Field Reports

For the Manager/Administrator Role

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Field Report Capabilities and Benefits

The Field Report module assists with:

- **Cloud-Based Efficiency:** Manage daily logs effortlessly from the cloud for real-time updates and accessibility.

- **Mobile Field Updates:** Generate daily logs and updates on mobile devices, ensuring flexibility and on-the-go productivity.

- **Customization and Rapid Reporting:** Tailor tabs for varied daily log types, allowing comprehensive reporting and swift generation of custom reports.

- **Intuitive Views:** Access weekly and monthly views for a quick overview of submitted and updated logs.

- **Instant Office Access:** Walk the job site, post reports, and provide the main office instant access to critical information.

- **Document Management:** Attach supporting documents directly to field updates, ensuring all relevant information is readily available.

- **Sync with Accounting:** Seamlessly synchronize field reports with accounting systems, streamlining data management and coordination.

- **Customized Templates:** Organize data efficiently with custom field report templates, including only essential information.

- **Digestible Log Categories:** Create daily logs with easily understandable categories, including relevant groupings such as labor, equipment, and materials.

The Field Report Module streamlines the logging process to enhance overall communication, reporting and efficiency. Let's get started!

Users that will Benefit from this User Guide

- Field Supervisor
- Project Manager
- Manager
- Administrator

Note: An Administrator may also function as a Manager.

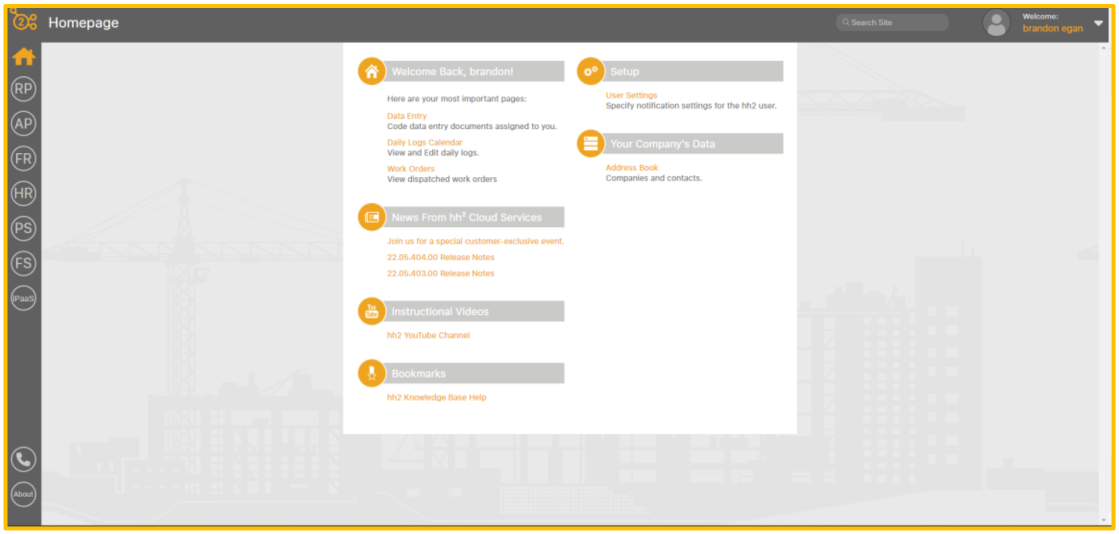
Note: A comprehensive Glossary of Terms is available at the end of this document. It includes hh2 terminology for all product areas and some general industry language.

Note: This User Guide is intended to be used alongside the software for maximum comprehension.

Home Page

Upon log in, the user is brought to the Home Page.

The Home Page will appear differently for different users depending on the modules purchased, the user role, and permissions granted.



This is an example of how the Home Page <u>may</u> appear for a Foreman out in the field.

Note: The Home Page  icon is present on all pages. A colored Home Page icon indicates the user is situated on the Home Page. Use this icon to navigate back to the Home Page.

This is how a Home Page <u>may</u> appear for users such as a manager, with many permissions.

The Modules the user has access to are listed in the left column.

Modules include:

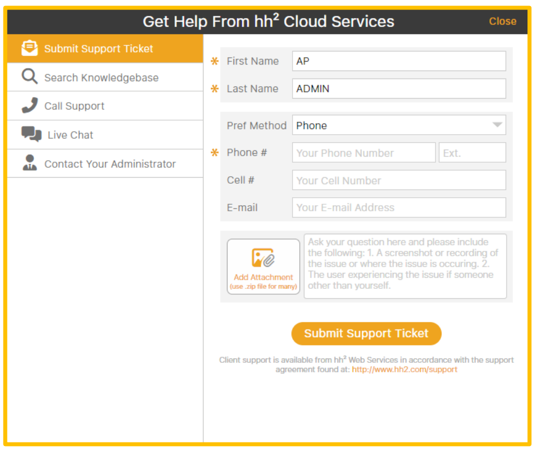
- Remote Payroll indicated by the RP link.
- Document Flow indicated by the AP link.
- Field Reports indicated by the FR link.
- Human Resources indicated by the HR link.
- Pay Stubs indicated by the PS link.
- Field Service indicated by the FS link
- The iPaaS Channel iPaSS link. This channel is for users that synchronize data between the hh2 and 3rd party providers such as Procore, Autodesk and Trimble.

Each link will take the user to the associated module of the hh2 system by clicking on it.

The Phone  icon sits below the Module links. The Phone icon is used to reach out to hh2 Customer Support, after the implementation process. When selected, the Get Help From hh2 Cloud Services Page displays.

To Submit a Customer Support Ticket:

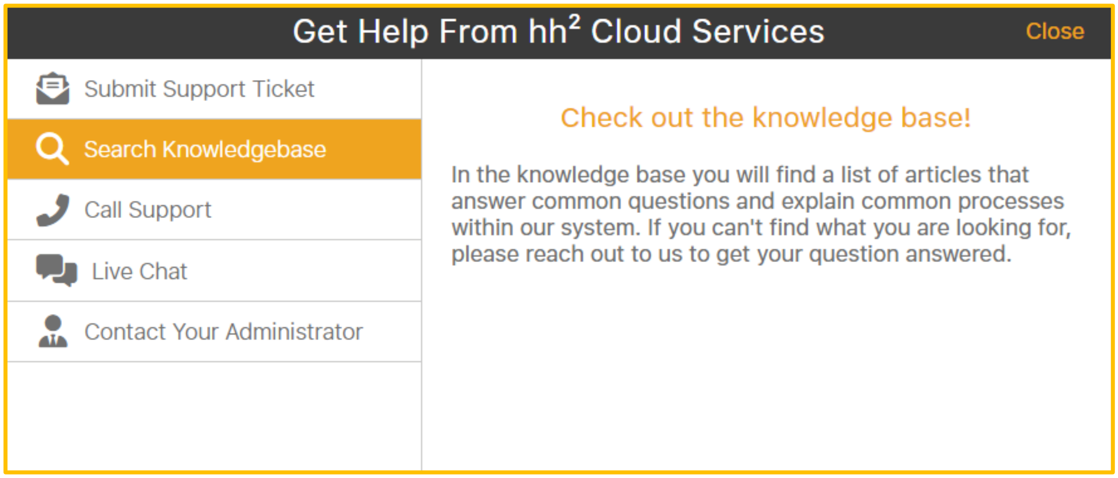
1. Go to the Home Page.
2. Select the Phone Icon.



3. Select the Submit Support Ticket tab in the upper left corner.
4. Enter any information that has not automatically populated from the User Profile.
5. Select Add Attachments if there are supporting documents.
6. Select Submit Support Ticket.
7. A Customer Support Agent will reach the individual with the contact information provided.

To Search the Knowledgebase:

1. From the Home Page, select the Phone icon.
2. Select Search Knowledgebase.

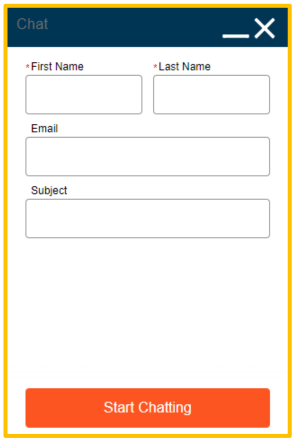


3. Click on the words, "Check out the knowledge base!"
4. Search the knowledge base using key words in the Search field or select a box by product area.
5. Close the browser when complete to return to the Home Page.

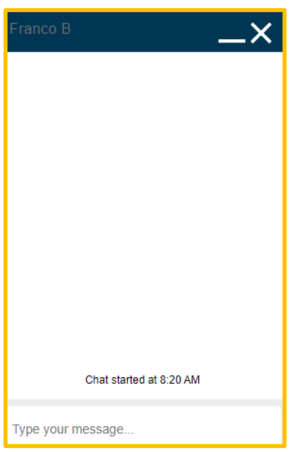
To Contact hh2:

1. Select the Contact Us 

icon at the bottom of any page. This will be displayed for Administrators only.



2. Enter the data requested.
3. Select Start Chatting.



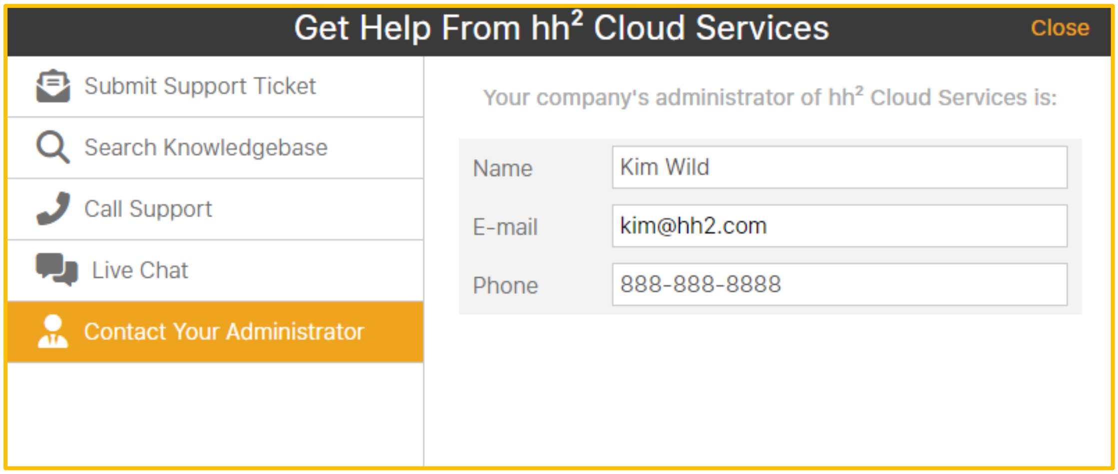
4. Type your message and an expert will reply.
5. When complete, select X.
6. Select Confirm End Chat.
7. Select Close.

Note: Call Support and Live chat are an add on subscriptions available to Pro Support customers and only available to users with System Administrator permissions enabled.

To Contact Your Administrator:

This allows the user to contact the system administrator at the construction company.

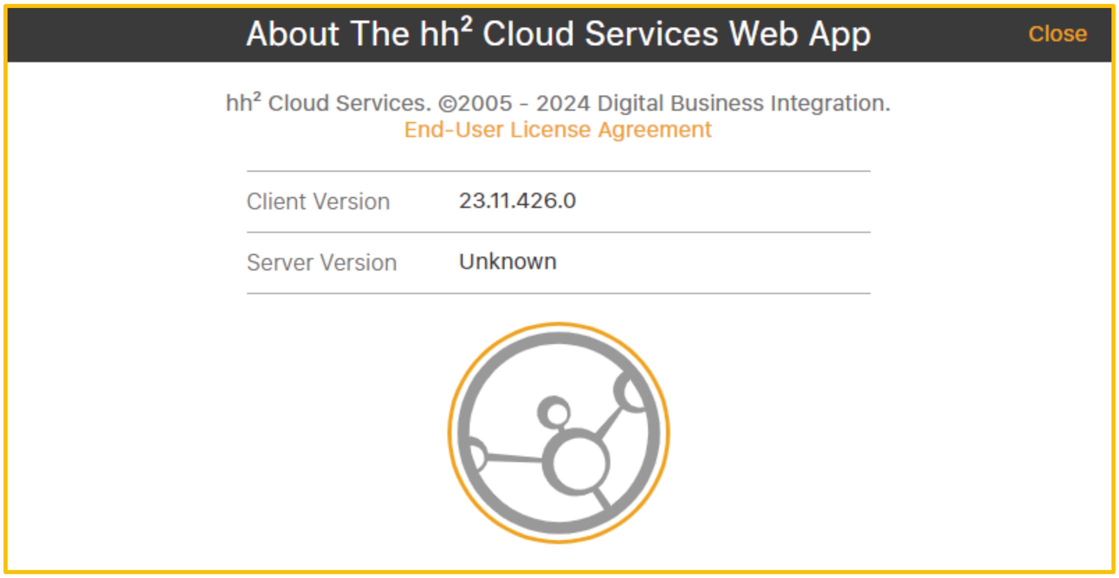
1. From the Home Page, select the Phone icon.
2. Select the Contact Your Administrator tab.



3. The contact information will be provided.

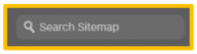
The About Icon:

The About  icon provides the user with version and server information. This is useful information when contacting Customer Support.



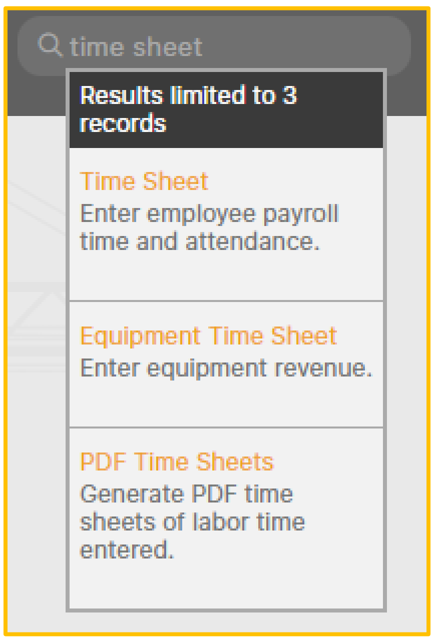
The Top Task Bar on the Home Page

Along the top of the Home Page there are other tools. Those tools include the Search Sitemap tool, the User Avatar, and User Profile Information.

The Search Sitemap  field allows the user to search for any feature the user has permission to access.

To Use the Search Sitemap:

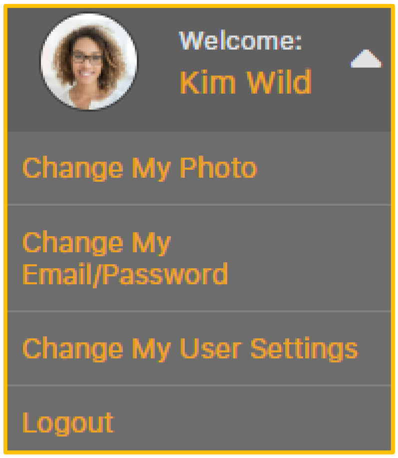
1. Enter a topic or partial topic.
2. The field will auto-populate with potential topics.



3. Select the topic title with a click.
4. The system will automatically navigate the user to the associated hh2 page if permissions are granted to that user.

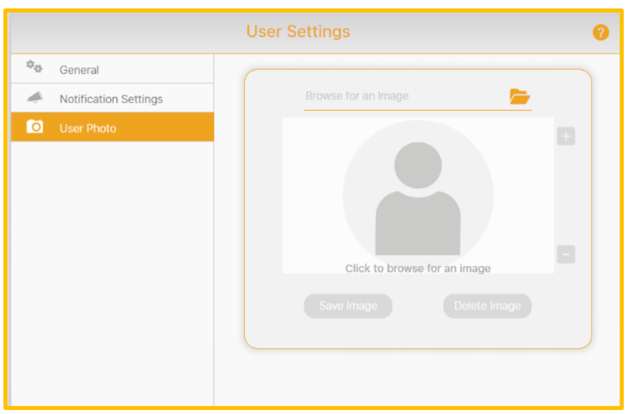
User Avatar:

By clicking on the User Avatar icon or username, the Profile Data Picklist and associated links appear.



To Upload a Photo:

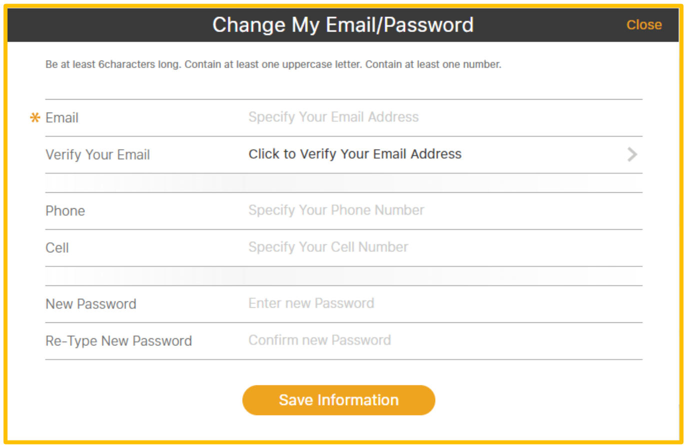
1. Select the User Avatar icon or username.
2. Select Change My Photo.



3. Select the Folder icon to browse for an image.
4. Select the file that contains the photo.
5. Select Open.
6. The image can be sized using the + and — icons.
7. Select Save Image.
8. Select Delete Image to delete the current photo.

To Change Email or Password Information:

1. Select the User Avatar  icon or username.
2. Select Change My Email/Password.

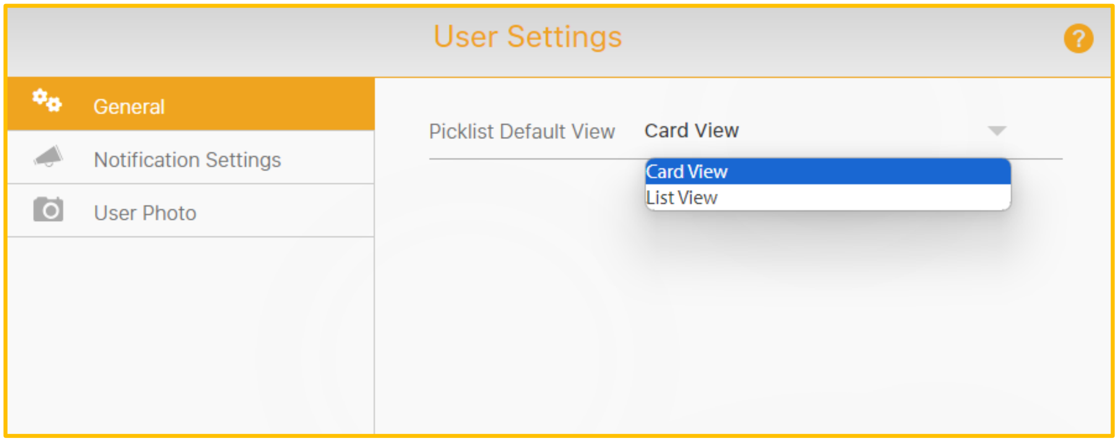


3. Enter the Email and Verify the Email Address.
4. Enter Phone and Cell Numbers. These numbers are used for contact information when submitting a Support Ticket.
5. Enter and Confirm a new password.
6. Select Save Information.

To Change User Settings

User Settings are unique to each user.

1. Select the User Avatar icon or username.
2. Select Change My User Settings.

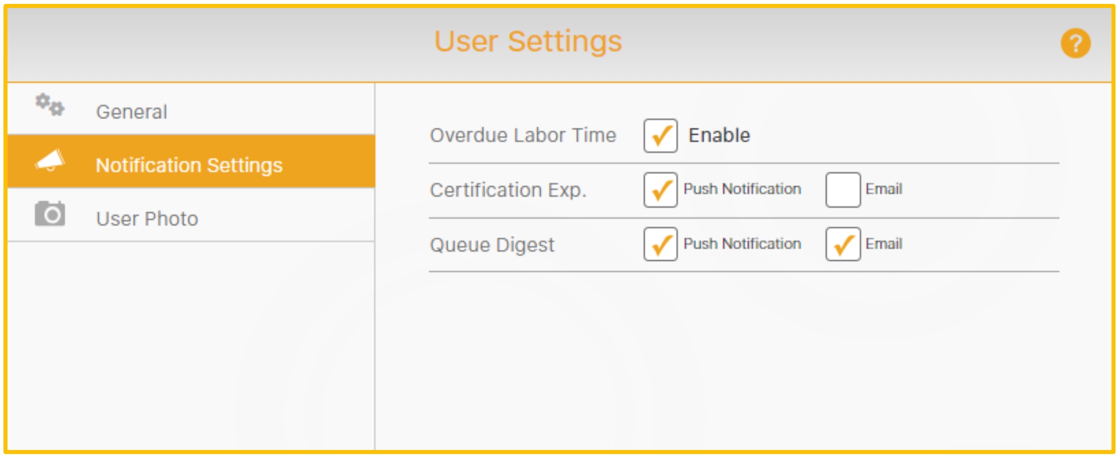


In the **General Tab of the User Settings Page**, users can select their Picklist preference. A Picklist, also known as a dropdown list, is a menu-like interface element often seen in forms and websites, offering users a set of predetermined choices to pick from, enhancing data entry efficiency and uniformity. In hh2 Picklists are either in Card View or List View format. The default is Card View.

To Select a Picklist Preference:

1. Select the User Avatar icon or username.
2. Select Change My User Settings.
3. Select the General tab.
4. Click the Picklist arrow.
5. Select user’s preference (either Card View or List View).
6. When the Ajax ✓ icon appears, the selection has been saved.

In the **Notification Settings Tab of the User Settings Page**, users can choose how they wish to be notified of events that relate specifically to their job role. For example, a user in the Admin Role may wish to receive notifications when overtime occurs. Other users may wish to know when certifications expire or when actions related to invoices are required by them. These notifications can occur via push notifications, email, both or not at all.



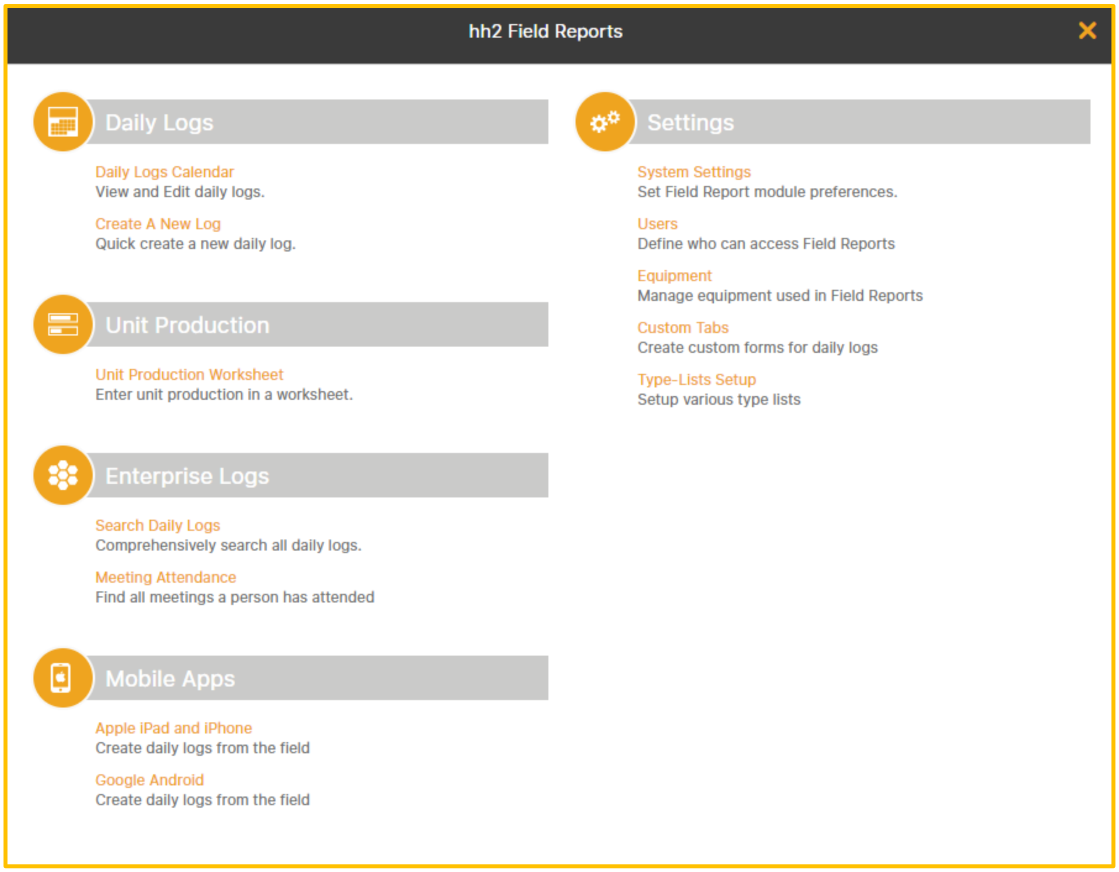
To Set Notification Settings:

1. Select the User Avatar  icon or username.
2. Select User Settings>the Notification Settings tab.
3. Check Overdue Labor Time (if using the Remote Payroll Module) to be notified of Overtime.
4. Next to Certification Expiration, check the preferred method of notification when Certifications have expired (if using the HR Module): Push Notification, mail, both or uncheck for no notifications.
5. Next to Queue Digest, check the preferred method of notification when there are Workflow items in the user's Primary Queue to be approved or rejected: Push Notification, Email, both or uncheck for no notifications. This is used in conjunction with the Document Flow module.

User Photo Tab of the User Settings Page. See To Upload a Photo.

The Middle of the Home Page

The appearance of the Home Page's middle section will vary depending on the modules purchased, user roles, and permissions. Administrators and Managers will experience different functionality on their Home Page than other users.



However, all users will have:

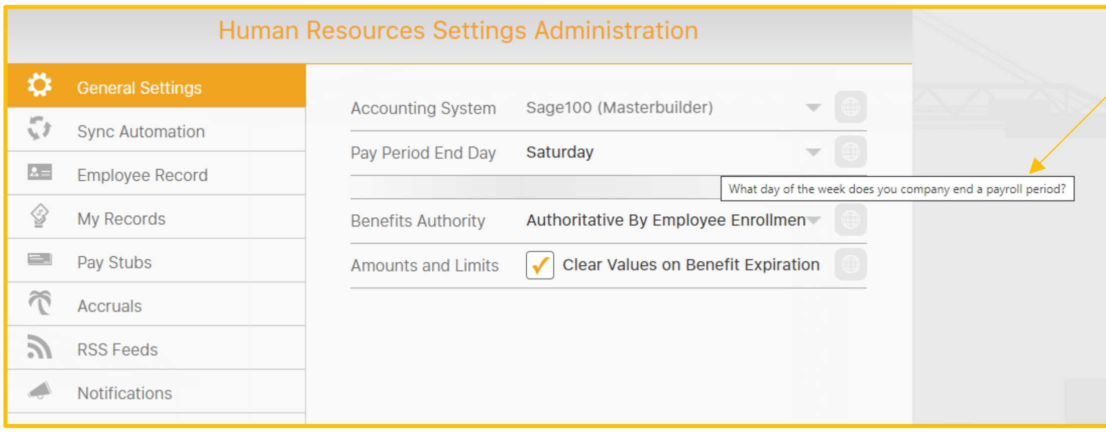
- Their **most important pages**, based on the modules and permissions they use.
- **News From hh2 Cloud Services**, with information on the latest software updates.
- Links to **Instructional Videos**.
- A **Bookmarks** section that allows quick access to important websites.
- A User **Setup** link to set their personal settings.
- **Your Company's Data.**

The Tool Tip

Throughout the system, the Tool Tip can be used to obtain a quick description of the associated item.

To Use the Tool Tip:

1. Hover the mouse over the topic where additional information is needed. In this case, Pay Period End Day. It will turn white.



2. A description will automatically display.

The Field Reports Process

The Field Reports module allows individuals in the field and others to report on regular tasks and job conditions on the job site. The module is mostly used by mid-level managers in the field.

It involves four steps:

1. Creating Daily Logs
2. Viewing and Editing Daily Logs
3. Finalizing Daily Logs
4. Reporting on Daily Logs.

Note: Field Reports may be set up to give users access to all Field Reports or grant access by job. Most commonly, users are permitted to access all Field Reports.

Note: Regarding interaction with the accounting system, Jobs, Cost Codes, Employee information and Equipment are the key components brought from the accounting system. Typically, Field Report information is not exported to the accounting system, apart from Unit Production. Some users only use the Unit Production portion of this product. Therefore, the four steps do not apply in that case.

System Setup and Configuration

Prior to using the Field Reports module, the following set up and configurations are required:

Field Reports Page:

- ✓ System Settings
- ✓ Unit Production, if used
- ✓ Users
- ✓ Equipment
- ✓ Custom Tabs
- ✓ Type-Lists Setup
- ✓ Download the Field Reports App Download for the Field User.

In general, when an Administrator signs into hh2, set up and configuration will be located on the right side of the page and use tools are located on the left side of the page.

The key sections the software utilizes for Field Reports are located on the left side of the Field Reports Landing Page. They are:

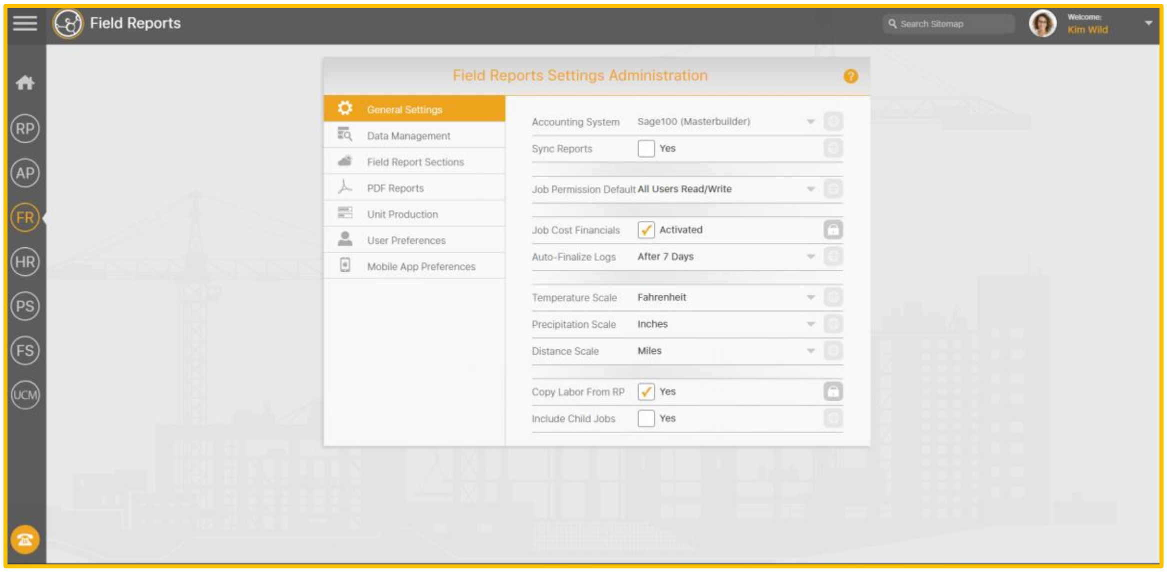
- FR>Daily Logs>Daily Logs Calendar
- FR>Daily Logs>Create a New Log
- FR>Unit Production>Unit Production Worksheet
- FR>Enterprise Logs>Search Daily Logs
- FR>Enterprise Logs>Meeting Attendance
- FR>Project Reports>Legacy Logs for those using Daily Logs prior to 2013

Field Report Set Up

System Settings

Field Report module preferences are set up in FR>Settings>System Settings.

1. Navigate to FR>Settings>System Settings>**General Settings** tab.



2. Use the dropdown from Job Permission Default to set which users can assess, read, and write Field Reports.

3. In the Auto-Finalize Logs field, select the number of days for a report to exist prior to being finalized and locked by the hh2 system. After that point, changes can no longer be made to the report. The starting point for the time is the creation of the report. In other words, if set to 7 Days, users will have 7 days from the date of report creation to complete and finalize the report prior to it being locked. If a report is not finalized within the selected period, the hh2 system will automatically finalize the report. Once a report is finalized, changes are no longer permitted.

4. Temperature, Precipitation and Distance units can be set using the associated dropdown menus.

5. If the Remote Payroll module is utilized, time may be copied from Remote Payroll to the Field Report section (tab) labeled Remote Payroll on the Field Report. To enable this functionality, check the Copy Labor From RP field.

From the Field Reports Section tab in System Settings, Administrators can select the Sections (sometimes called tabs) they wish to have displayed on Field Reports.

1. Navigate to FR>Settings>System Settings>**Field Report Sections** tab.

2. Select any Sections (tabs) to be used on the Daily Log from the Unused Section and drag them to the Active Sections. To remove unwanted Sections from the Active Sections, simply drag to Unused Sections. Note: Sections can be placed by page, based on the construction company's preferences. Users may also set their own personal order for Sections, if permitted, using User Settings. See User Settings.

Unit Production Set Up

In construction, Unit production involves quantifying work tasks using standardized units, such as square footage or linear feet. An example of unit production is tracking the square footage of drywall installation. This method allows for precise measurement, tracking, and management of construction activities. By breaking down tasks into measurable units, construction professionals can more accurately estimate costs, assess project progress, and allocate resources efficiently. For accuracy, it is best practice to regularly enter unit production data. Otherwise, the numbers become irrelevant and inaccurate. This setup is connected to the Unit Productions Worksheet (FR>Unit Production>Unit Production Worksheet). This feature is for customers using Sage 300 only.

1. Navigate to FR>Settings>System Settings>**Unit Production** tab.

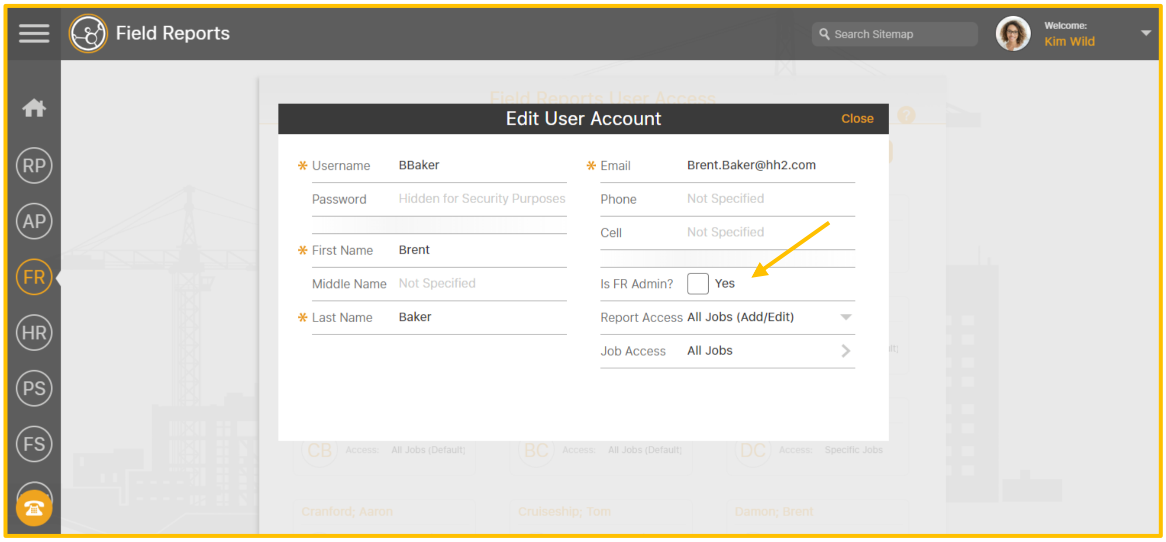
2. Select the Log Type: This determines which log type the Unit Production data will appear. Log Type controls which tabs will display.
3. To view the Percent Complete on the Unit Production Worksheet, check the Percent Complete box. This will display the percentage complete for each cost code on the Unit Production Worksheet. **Note:** The cost code must be selected on the worksheet to show this data.
4. Check the Auto-Calculate box to have hh2 calculate the completion percentage. This will calculate the units in place divided by the estimated units.
5. Check the Non-Estimated Codes Exclude box to exclude cost codes that have not been estimated. This prevents them from appearing on the Unit Production Worksheet and on related reports.

6. Select how to pre-fill the description on the Description field of the Activities Section. Choices include Do Not Pre-fill, Cost Code Name, User’s Name or User’s email address.
7. Select one of the Sync to field choices. These are tied to sections in the Sage accounting system.
8. Select the Worksheet End Day from the dropdown to choose the day of the week in which the Unit Production Worksheet will end.

Users

Administrators much have permissions as a Field Report Administrator. Other users will require permissions to access reports either by All Jobs, or only specific jobs.

1. Navigate to FR>Settings>Users>specific user.
2. FR Administrators will need to be set up as an Administrator by checking Is FR Admin.
3. Other Field Report users will need to have Report Access to All Jobs or only specific jobs. The default is to give access to the users.

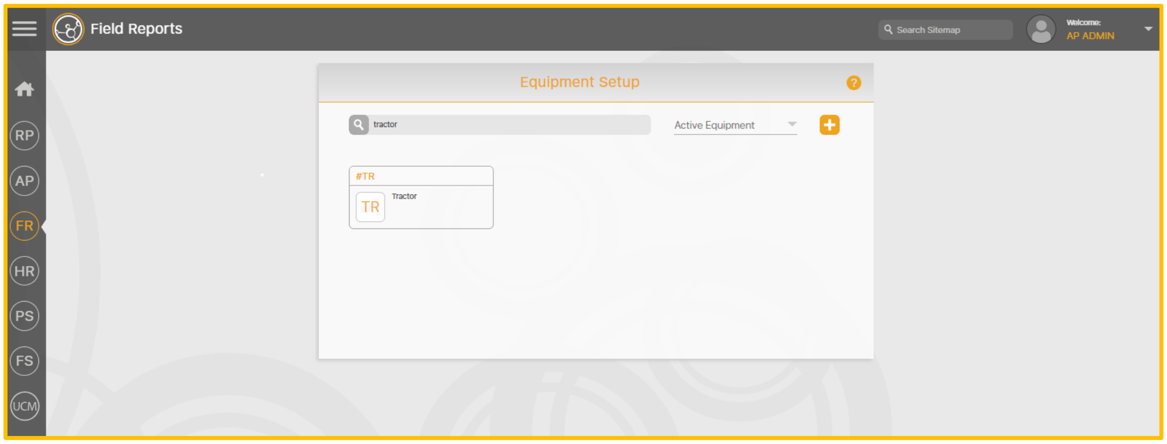


4. Select Close.

Equipment

When utilizing the Equipment Section, it is necessary to have Equipment set up in the system.

1. Navigate to FR>Settings>Equipment.



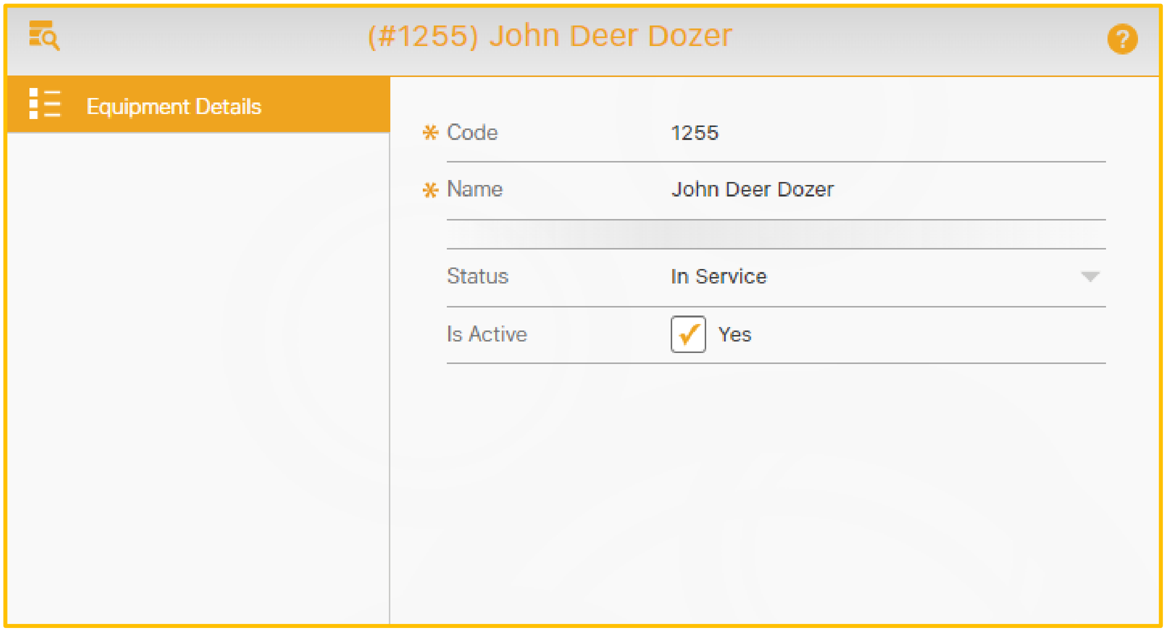
2. From the Equipment Setup Page, equipment can be searched on using the Search field.

3. Equipment may also be added using the Add + icon.

Note: There is the option to use the Equipment Revenue as a section from the Remote Payroll module, however it only works from the mobile application. This is enabled on the website, but reports would need to be run from the mobile application.

To Add Equipment:

1. Navigate to FR>Settings>Equipment.
2. Select the Add + icon.



3. Enter the Equipment Code Number (required).
4. Enter the Name of the equipment (required).
5. Enter the Status of the equipment (in service or out of service).
6. Select Create Equipment.

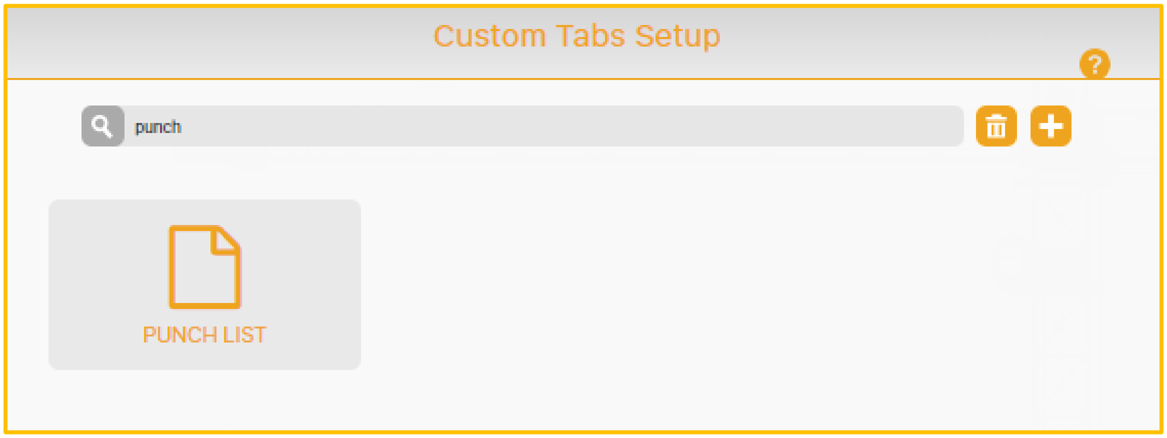
Note: The Knowledge Base icon will link the user to related Knowledge Base articles.

7. Uncheck Active if the equipment is inactive.
8. Exit the Page and search for the newly entered equipment from FR>Settings>Equipment.

Custom Tabs

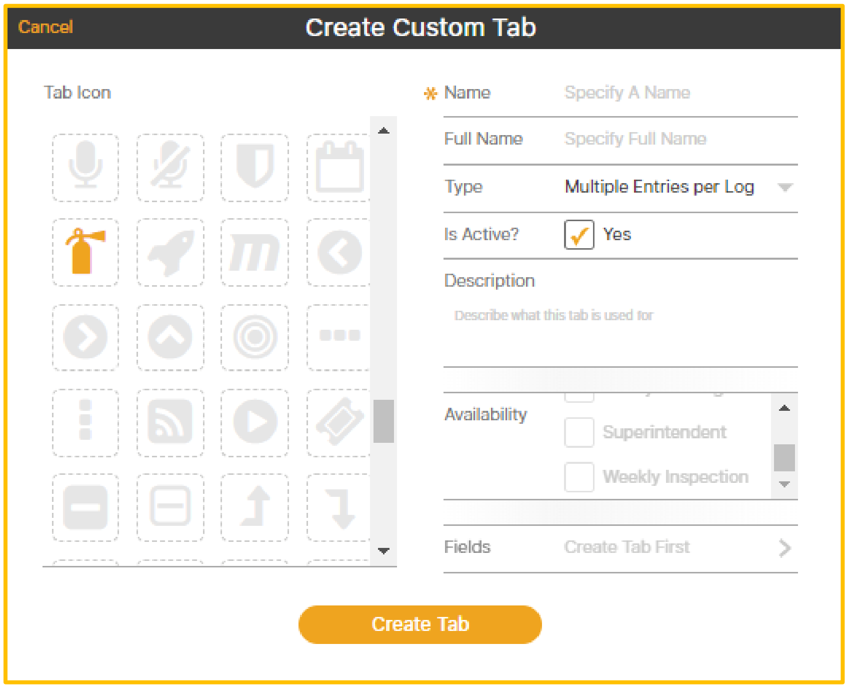
Custom Sections (also referred to as tabs) may be created to suit the construction company's needs and preferences.

Navigate to FR>Settings>Custom Tabs.



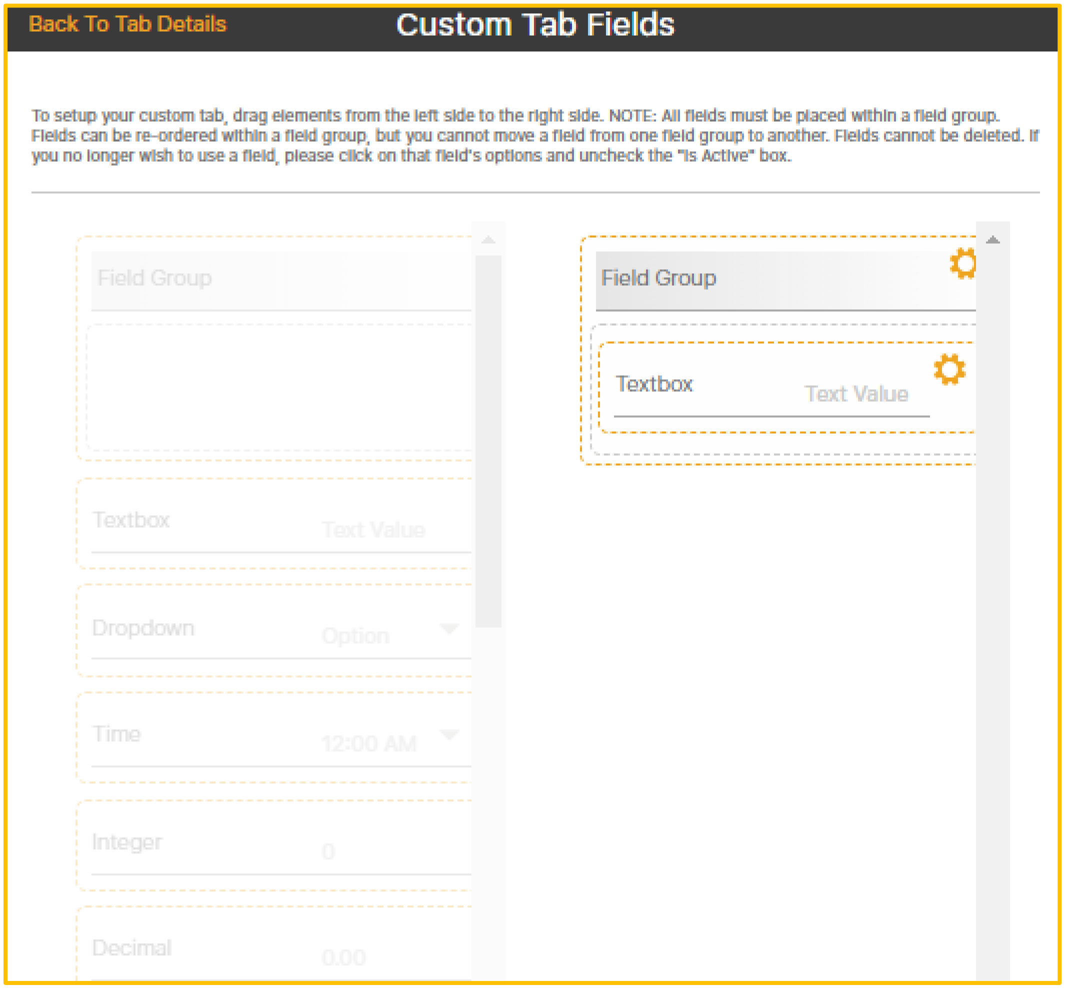
To Add a Custom Section:

1. Ensure Custom Tabs is enabled (FR>Settings>System Settings>Field Report Sections).
2. Select the Add + icon from the Custom Tab Setup Page.



3. Select a Tab Icon.
4. Enter the required Section (tab) Name. This may be a shorthand name. The Full Name field is used to enter the Full Name of the Section.
5. Select Multiple Entries per log in the Type field. There is only one choice
6. Check Is Active.
7. Add an optional Description.
8. Select Create Tab.
9. Check options for Availability. This controls which Log Types the Custom Tab will appear on. **Note:** If the Custom Tab does not display this is a good place to troubleshoot. Ensure the Custom Tab is Available for the Log Type selected.

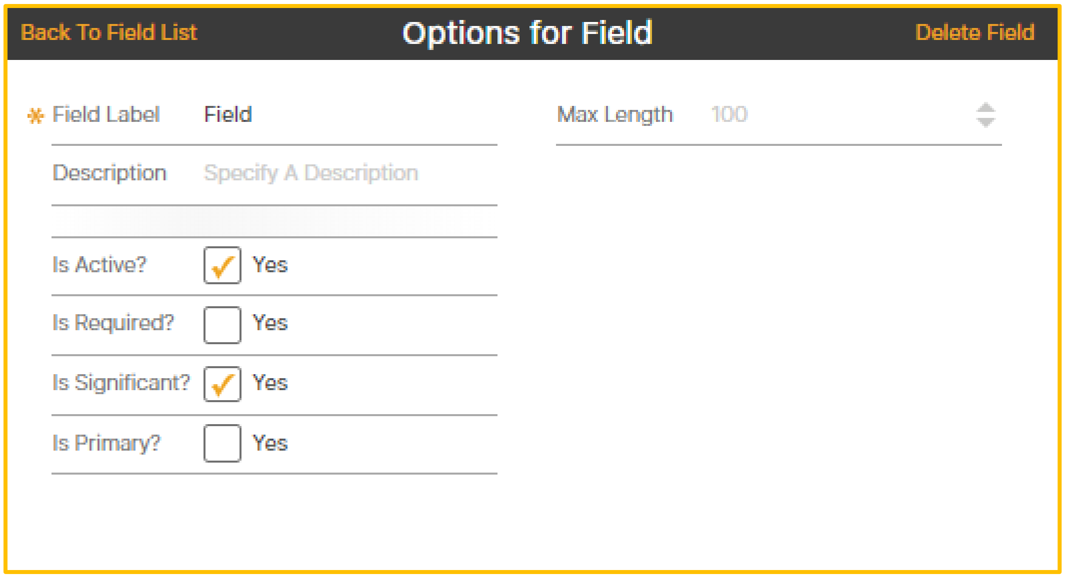
10. Next, set up the Custom Tab Fields (these are the fields that will display when logging data to the Section). Click the arrow in the Fields field on the Create Custom Tab Page. The Custom Tab Fields Page will be displayed.



11. On the Custom Tab Fields Page, drag the Field Group from the left column to the right. Every field must be part of a Field Group.

12. Drag any Fields needed for the Custom Section (Tab) and place them in the Field Group box. Repeat, as necessary. In the example above, the Field Group was dragged from the left to the right first. Then the Textbox was dragged into the Field Group. More than one field may be moved.

13. The Settings icon provides options for the Field. The Description field on the Options for Field will be displayed on the Custom Tab in the Field Report.



14. Name each field by entering a name in the Field Label field.
15. Select a Max Length of characters.
16. Check any necessary options (Active, Required, Significant, Primary).
17. For multiple choice fields, or options fields add a choice by enter an answer and then select the Add icon.
18. Select Back to Field List or delete the Field using Delete Field.
19. Repeat for each field.
20. Reorder fields by dragging, if necessary.
21. Select Back to Field Details and then Close.
22. Navigate to FR>Settings>System Settings>Field Report Sections and add the Custom Section (Tab) to the appropriate page of the Field Report by dragging.
23. Refresh.
24. The Section then displays as one of the Field Report Sections of the Daily Log.

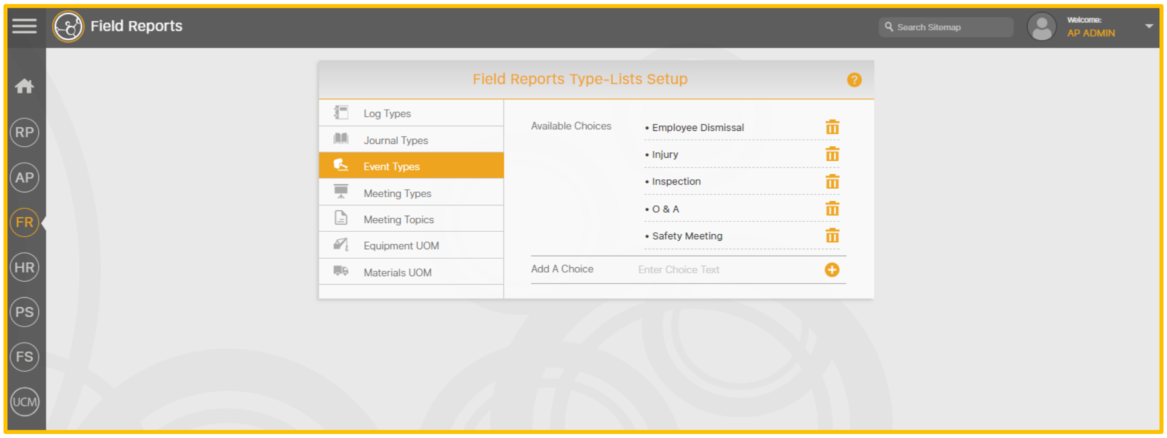
Note: Users may order the Field Report Sections in their personal User Settings as well.

Note: New Custom Sections (Tabs) will not display on older logs. For unfinalized Field Reports the new tabs will be displayed.

Note: There must be more than one Field for the Custom Tab to display.

Type-Lists Setup

Field Report Type lists allow the Administrator to set up types for each of the Sections. For instance, there may be a variety of types of Events, such as an injury, an employee dismissal, a safety meeting, or an inspection. In hh2, the Event is the Section on the Field Report (Daily Log), while the type is the kind of section such as an injury, employee dismissal and so forth. The types associated with any section are completely customizable to meet the construction company's needs and preferences.



To Add a Type:

1. Navigate to FR>Settings>Type-List Setup.
2. Select the associated tab for the Section to add types. For instance, to add types to Events, select the Events tab.
3. Enter the Choice Text. For instance, Employee Dismissal.
4. Select the Add icon adjacent to Add A Choice.
5. The new type will populate at the top of the Types list and be available on the Daily Log.
6. Types may be deleted, using the Delete icon. They will no longer appear in the Daily Log as a choice option.

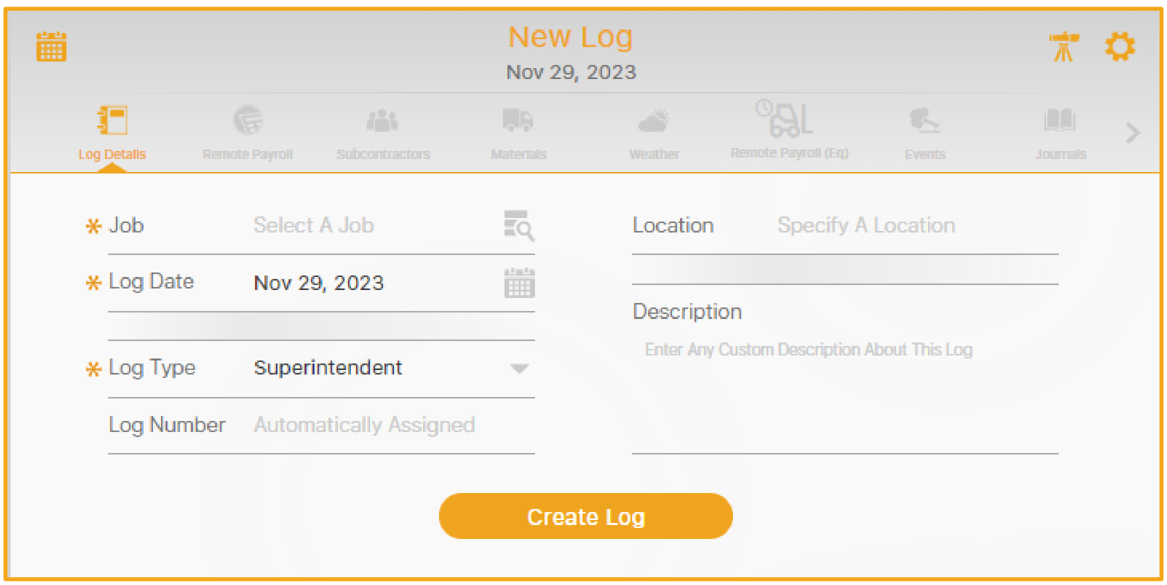
Step 1: Create a New Daily Log

Create a New Log allows for the creation of a new daily log. **Note:** Once a Daily Log is created, it cannot be removed from the system for auditing purposes. Daily Logs can be made on the website or in the field using the mobile application. These instructions are for the website.

Navigation: FR>Daily Logs>Create New Log

To Create a New Log:

1. Navigate to FR>Daily Logs>Create New Log.



2. Select a Job.
3. The Log Date will default to the current date. Reports cannot be created for future dates but can be created for past dates, if the finalization date has not yet passed.
4. Select a Log Type. The Log Type provides an effortless way to find reports. The Log Types in the Picklist are customizable. FR>Settings>Type-Lists Setup>Log Types.
5. The Log Number will automatically be assigned and populated.
6. A location and description may be added.
7. Select Create Log.
8. Once the Log is created, the user has access to the sections of the report at the top of the New Log Page.

Tools on the Daily Log Page

Navigation: FR>Daily Logs>Create New Log

Calendar Icon:

The Calendar icon will take the user to the Daily Logs Calendar, where it may be viewed.

Export Icon:

The Export icon allows the user to export to Excel, PDF or move the log from one Job, Date, or Log Type.

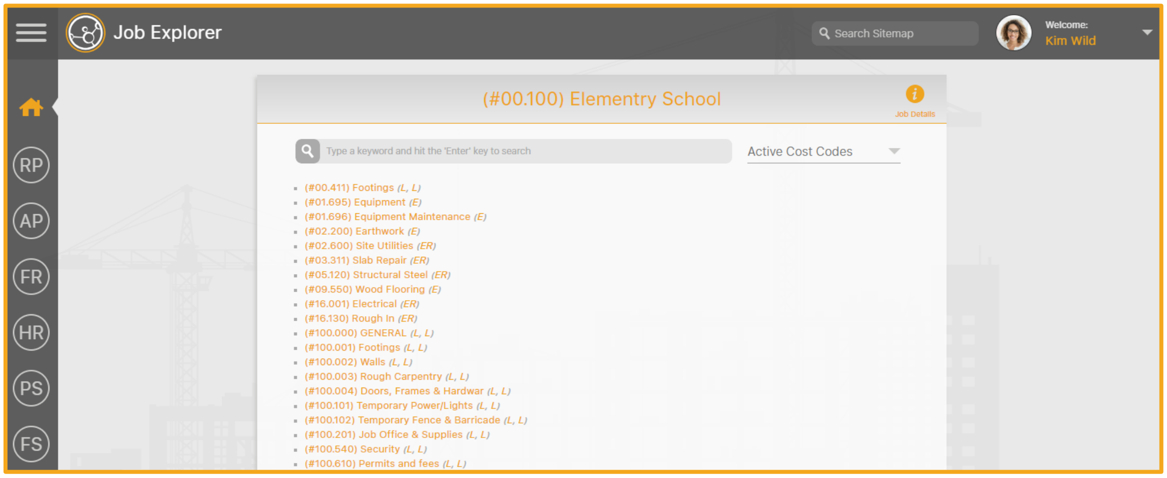
< or >: Allows the user to move between logs.

Sections:

Sections define the various parts of the daily log. < or > adjacent to Sections moves the user between pages of Sections.

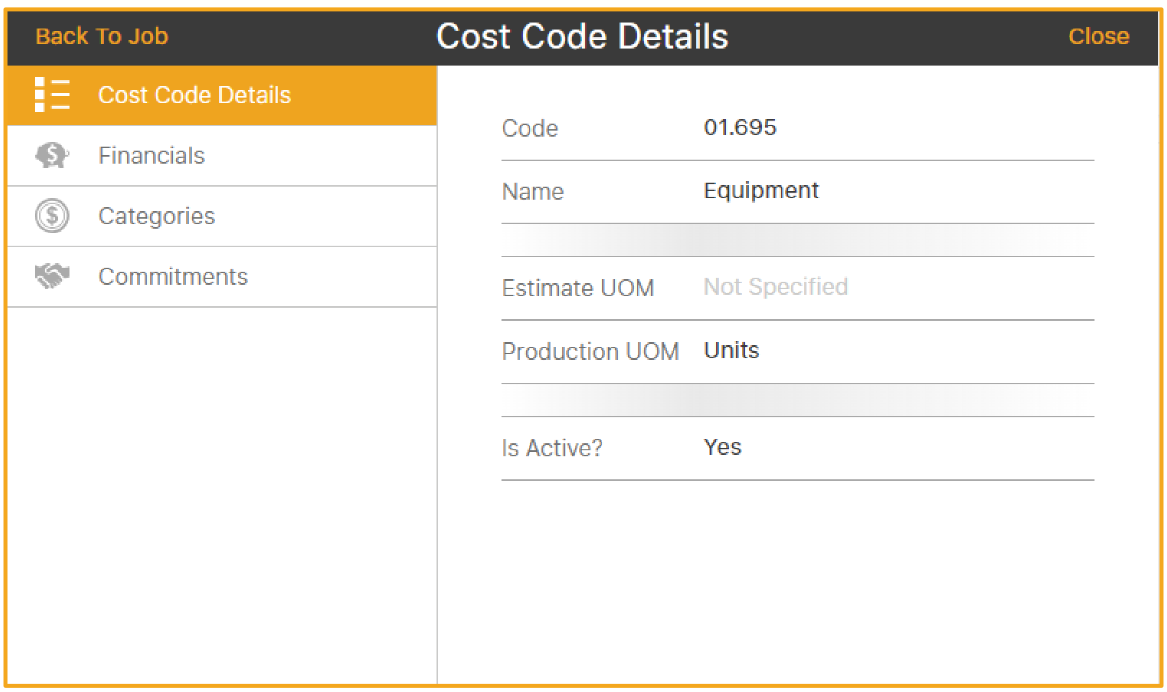
Job Explorer:

The Job Explorer  icon allows the user to access Cost Codes associated with the Job entered.



User Settings:

1. By selecting on a Cost Code, the Cost Code Details Page displays.

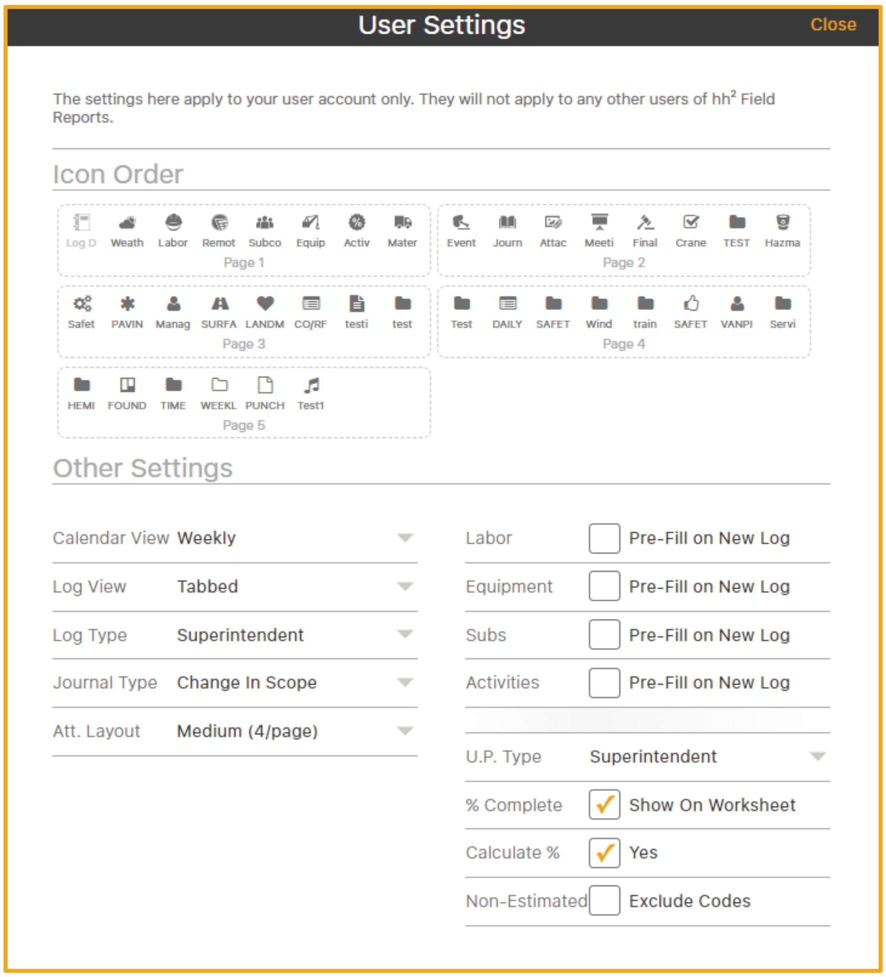


User Settings:

User Settings allow the individual user to set preferences associated with their own personal sign on for Field Reports, using the Settings icon. **Note:** The Administrator can lock these settings to force a particular view (FR>Settings>System Settings>Field Report Sections>Section Order). This enforces consistent reporting.

To Set Personal Preferences:

1. Select the Settings icon.



3. Select the Icon Order to display on the Daily Log by dragging.
4. Select the Calendar View (Weekly or Monthly).
5. Select the Log View (Tabbed or Single-Page).
6. Select the Log Type (Picklist options are set in FR>Settings>Type-Lists Setup>Log Types).
7. Select the Journal Type (Picklist options are set in FR>Settings>Type-Lists Setup>Journal Types).
8. Select the Attachment Layout (small thumbnails, medium 4/page or large 1 page)
9. Check to Pre-Fill Labor, Equipment, Subs, and Activities on a new log.
10. Select the Unit Production Type.
11. Check if % complete should be shown on the Worksheet.
12. Check Calculate % to have hh2 calculate the percentage for the user for Unit Production.
13. Check to Exclude Non-Estimated Codes.
14. Select Close.

Field Report Sections

Field Report Sections provide a means of documenting necessary information within a Daily Log. Field Report Sections may sometimes be referred to as Tabs. Field Report Sections offer the construction company great flexibility and customization for log use.

The most used Field Report Sections are:

- Weather
- Remote Payroll
- Labor
- Equipment-used with Field Reports standalone without Remote Payroll
- Subcontractors
- Journal Entries
- Meetings
- Events
- Attachments
- Materials
- Remote Payroll (Eq)-enabled on the website, but functions on the mobile application only.

Beyond what is listed above, there are other available Sections. Sections may also be customized from FR>Settings>Custom Tabs. See To Create Custom Sections.

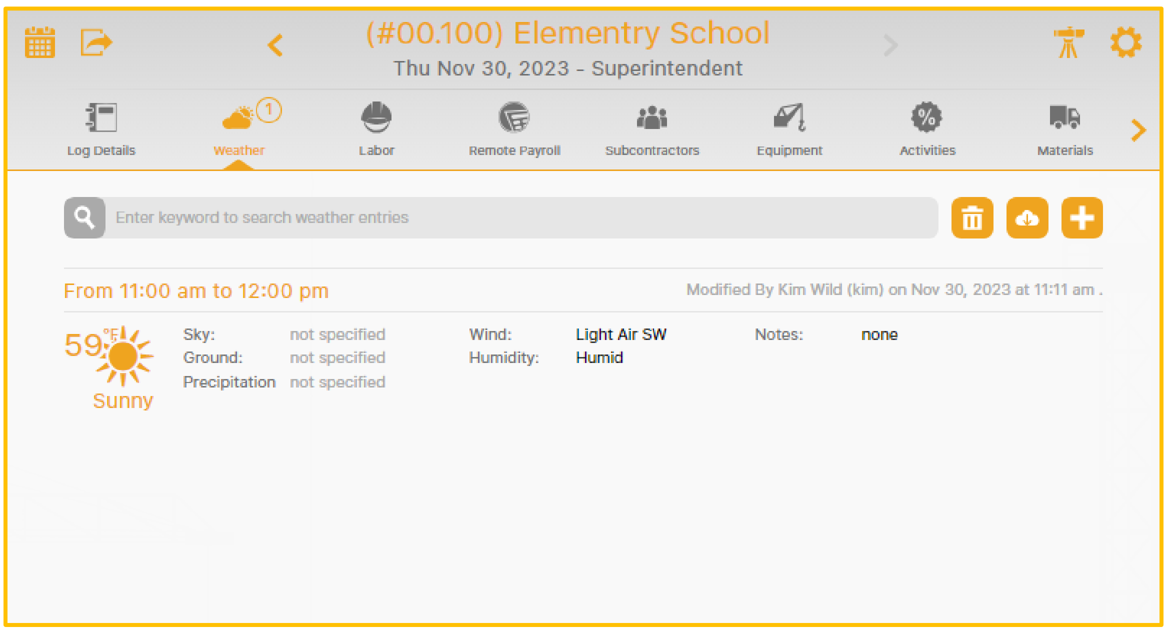
Notice the functionality for all Sections is similar, with the ability to add and delete on all sections, using the Add + icon and Delete icon, respectively. The capability to import entries and download data is available for some sections.

Weather Section

The Weather Section provides the ability to log weather conditions on a job site. It also enables the user to download the weather from Weather.com. The weather, however, must be for the current date.

To Download the Weather:

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add weather data.
3. Select the current day's log.
4. Select the Weather icon.
5. Select the Download icon.

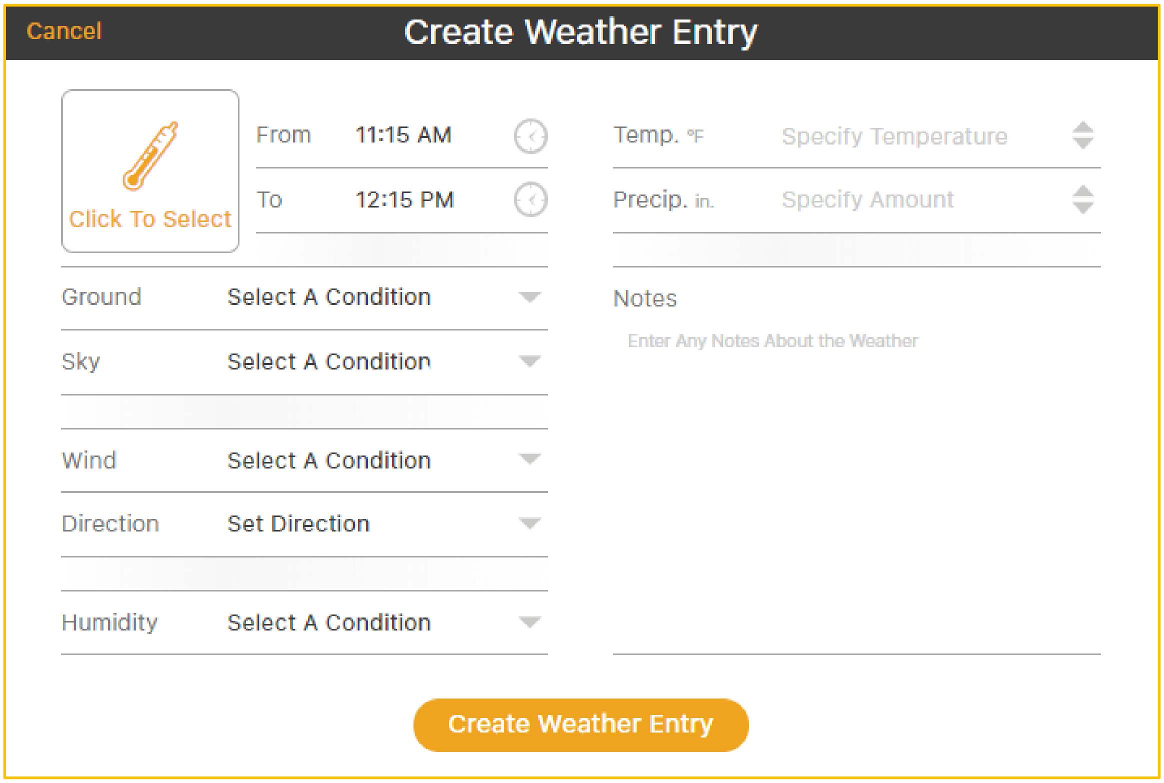


Note: The address of the Job must be in the system to download weather. Downloaded weather conditions are based on an hourly basis.

Alternatively, weather may be manually entered using the Add + icon. This is useful to document past weather conditions.

To Add Weather Manually:

1. Select the Add + icon.



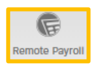
2. Enter the necessary data.
3. Select Create Weather Entry.
4. The weather will then be displayed in the Weather Section of the Daily Log.

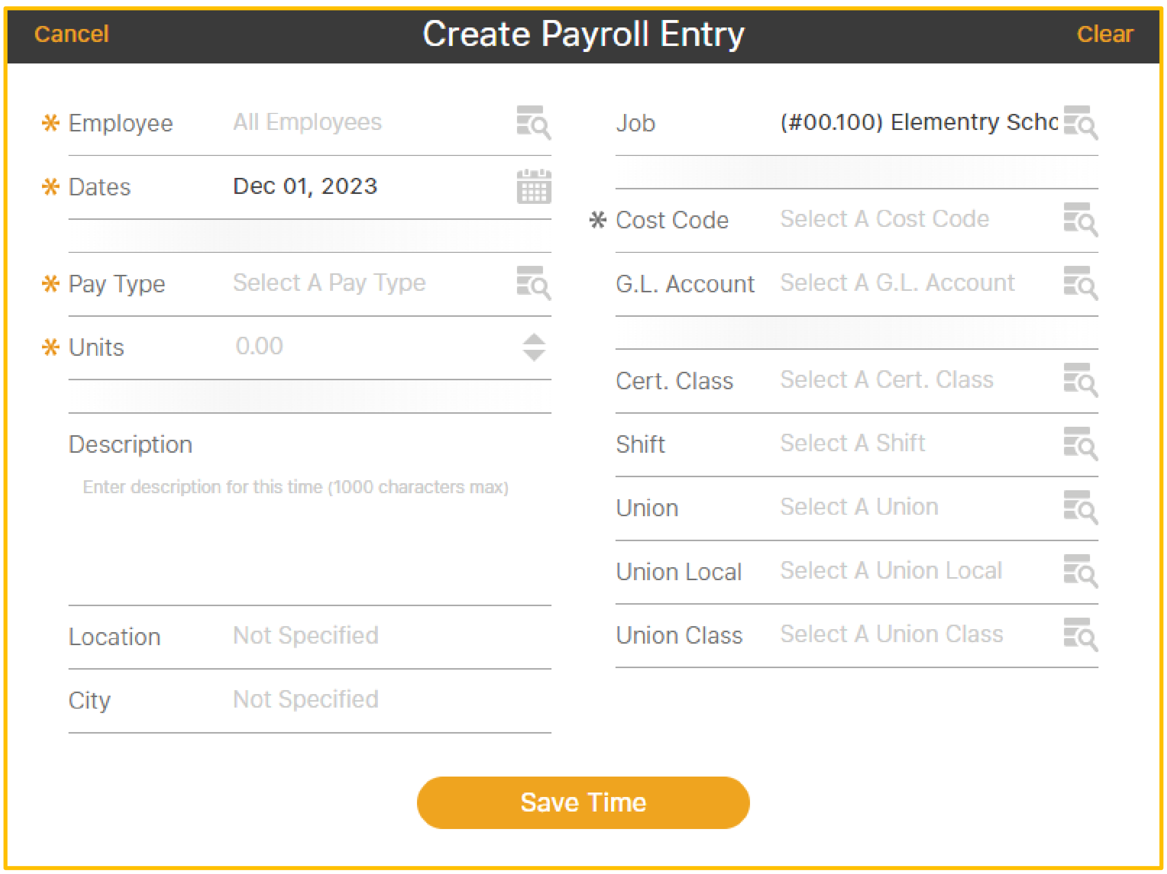
Note: The Notes in any Section can be searched on for easy access using the Search Daily Logs feature. See Search Daily Logs.

Remote Payroll Section

The Remote Payroll Section in Field Reports will automatically populate time from the Remote Payroll module Labor Time Sheet, if the Remote Payroll module is enabled and General Settings for the Field Report Module are set to do so. **Note:** While time can be entered in the Remote Payroll Section on the Field Report, time should <u>not</u> be entered on both the Remote Payroll Section of the Field Report <u>and</u> on the Labor Time Sheet in the Remote Payroll module. This will cause a duplication in time entered. It is best practice to enter time on the Labor Time Sheet in the Remote Payroll module. Coding time in the Daily log is best for one-off scenarios.

To Add Time from the Daily Log:

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add time data.
3. Select the Remote Payroll  icon.
4. Select the Add  icon.



5. Enter the necessary data.

6. Select Save Time.
7. Time will display in both the Labor Time Sheet and the Daily Log.

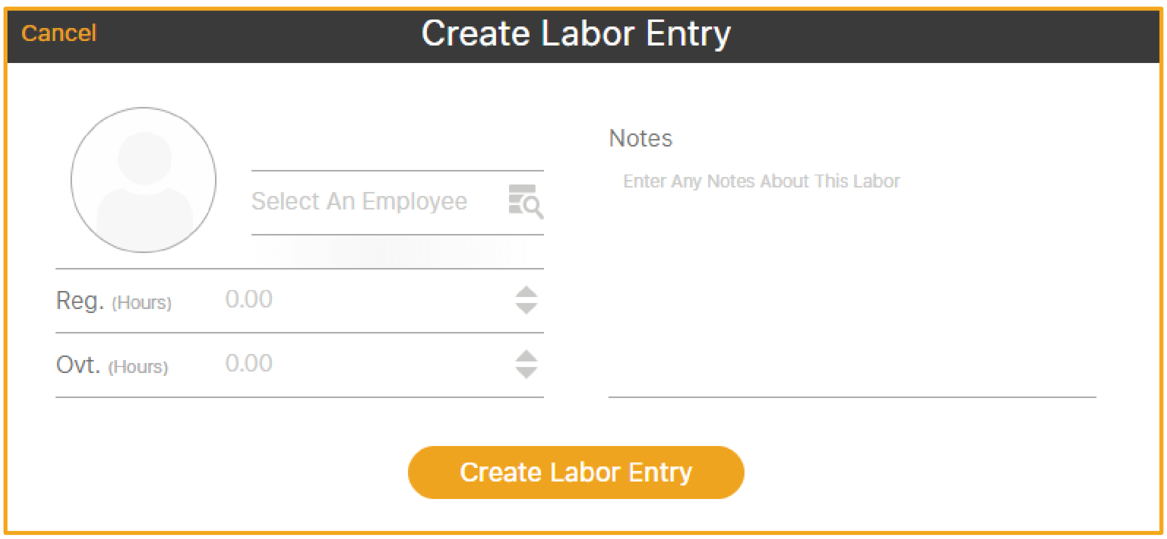
Note: Employees must be set up in the accounting system address book, or manually set up in the hh2 Remote Payroll module.

Labor Section

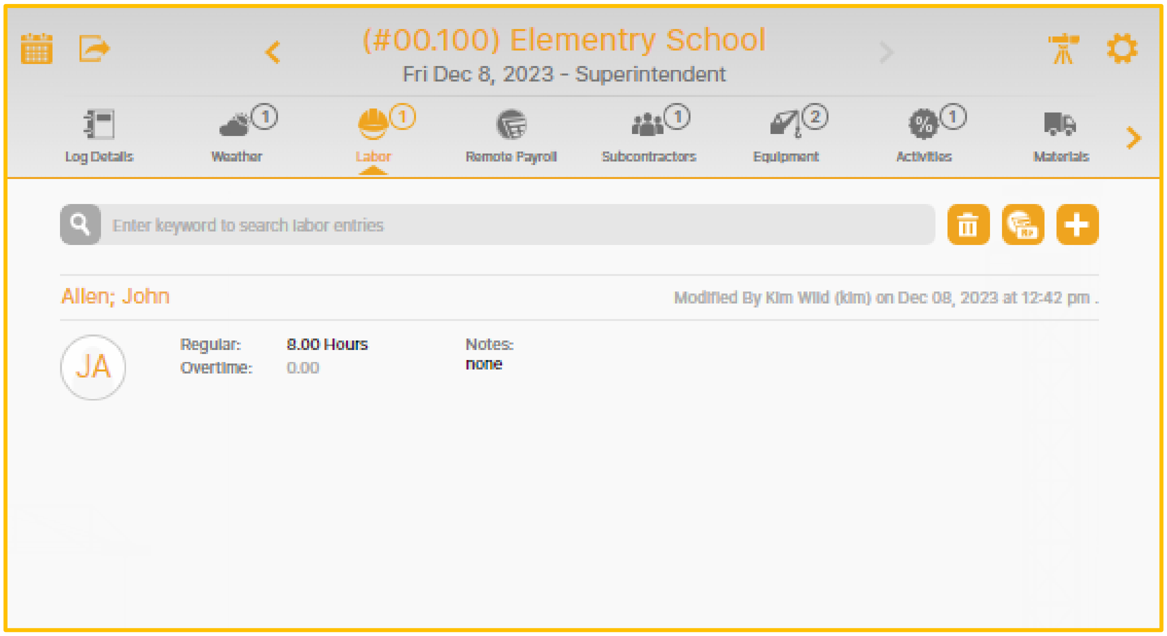
The Labor Section allows users to capture basic time information for construction companies that do not have the Remote Payroll module. This feature does not code time or export time to the accounting system. **Use Case:** To track time for temporary workers or subcontractors working on a job.

To Add Time Using the Labor Section:

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add labor data.
3. Select the Labor icon.
4. Select the Add + icon.



5. Select the employee.
6. Enter the time.
7. Enter any Notes.
8. Select Create Labor Entry.
9. The Labor then displays on the Labor Section of the Daily Log.

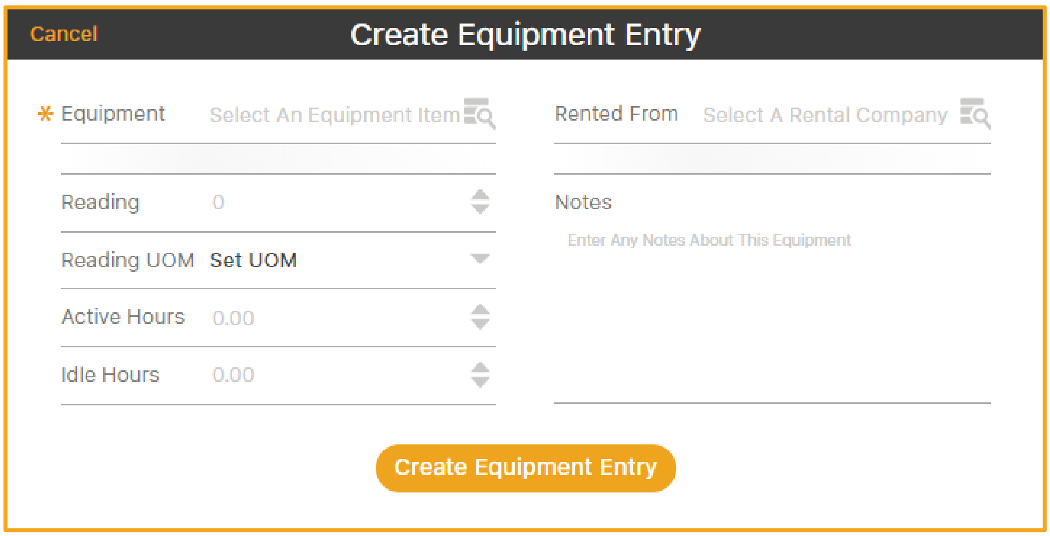


Note: Labor entries may also be imported to the log from the Remote Payroll Module, using the icon. Employees must be mapped to the Address book contacts.

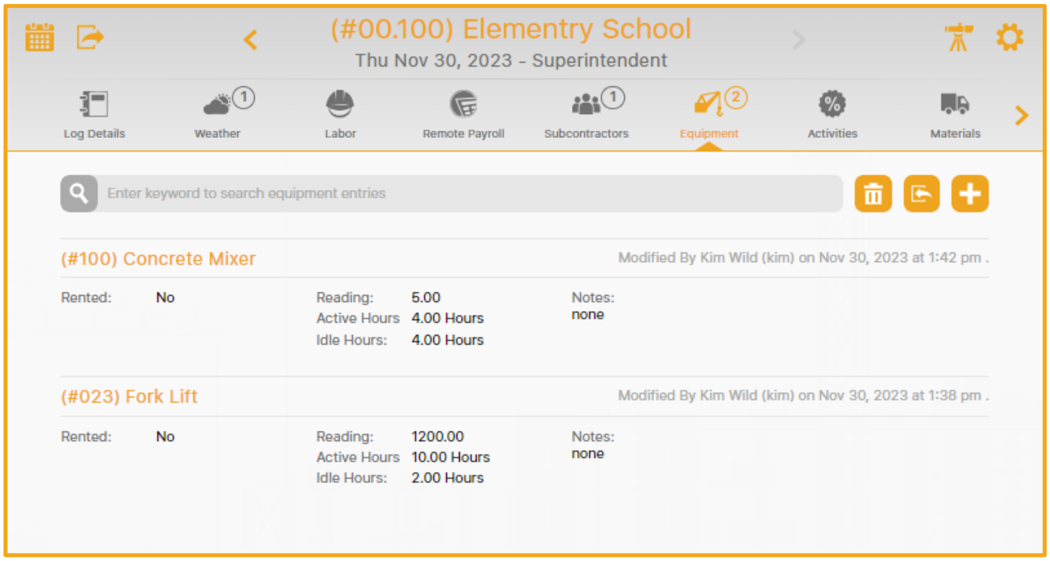
Equipment Section

The Equipment Section allows users to log equipment information such as odometer readings, active and idle hours, rental information, and notes. Equipment units of measurement (UOM) can be customized to meet the construction company's preference (FR>Settings>Type-Lists Setup>Equipment UOM).

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add equipment data.
3. Select the Equipment icon.
4. Select the Add + icon.



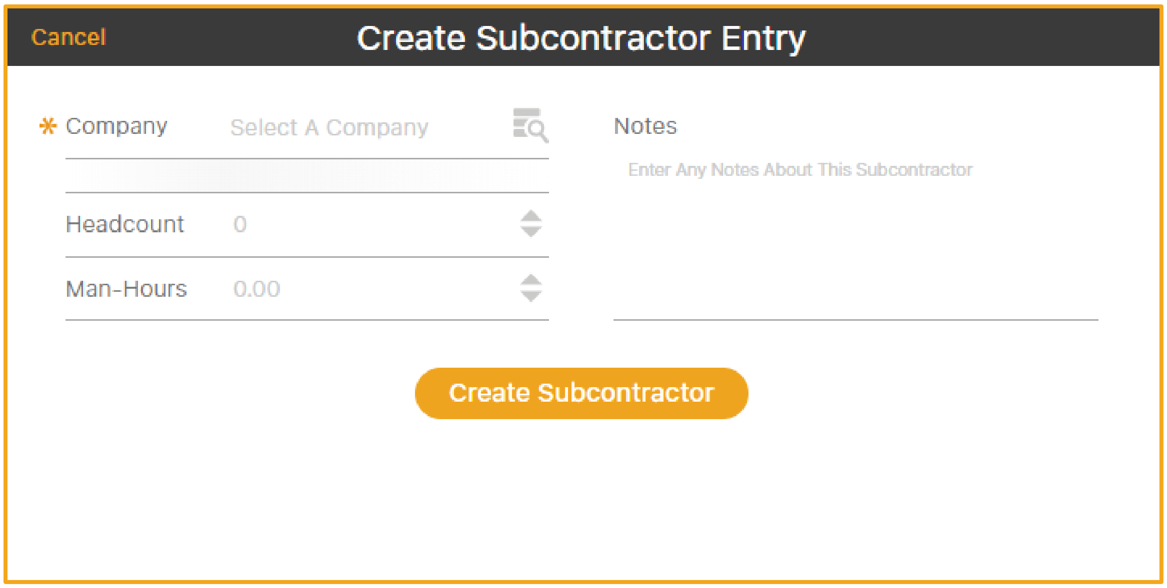
5. Enter the necessary data.
6. Select Create Equipment Entry.
7. The equipment data will be displayed in the Equipment section of the Daily Log.


(#00.100) Elementry School
Thu Nov 30, 2023 - Superintendent
Log Details
Weather
Labor
Remote Payroll
Subcontractors
Equipment
Activities
Materials
Enter keyword to search equipment entries
(#100) Concrete Mixer
Modified By Kim Wild (kim) on Nov 30, 2023 at 1:42 pm .
Rented: No
Reading: 5.00
Active Hours 4.00 Hours
Idle Hours: 4.00 Hours
Notes:
none
(#023) Fork Lift
Modified By Kim Wild (kim) on Nov 30, 2023 at 1:38 pm .
Rented: No
Reading: 1200.00
Active Hours 10.00 Hours
Idle Hours: 2.00 Hours
Notes:
none

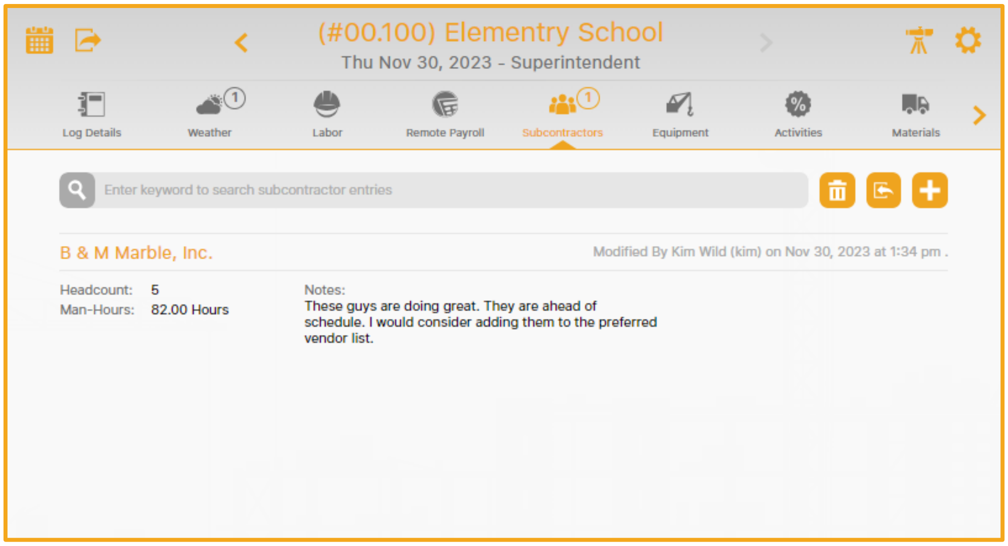
Subcontractors Section

The Subcontractors Section allows the user to log headcount, hours, and notes about subcontractors.

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add subcontractor data.
3. Select the Subcontractors icon.
4. Select the Add icon.



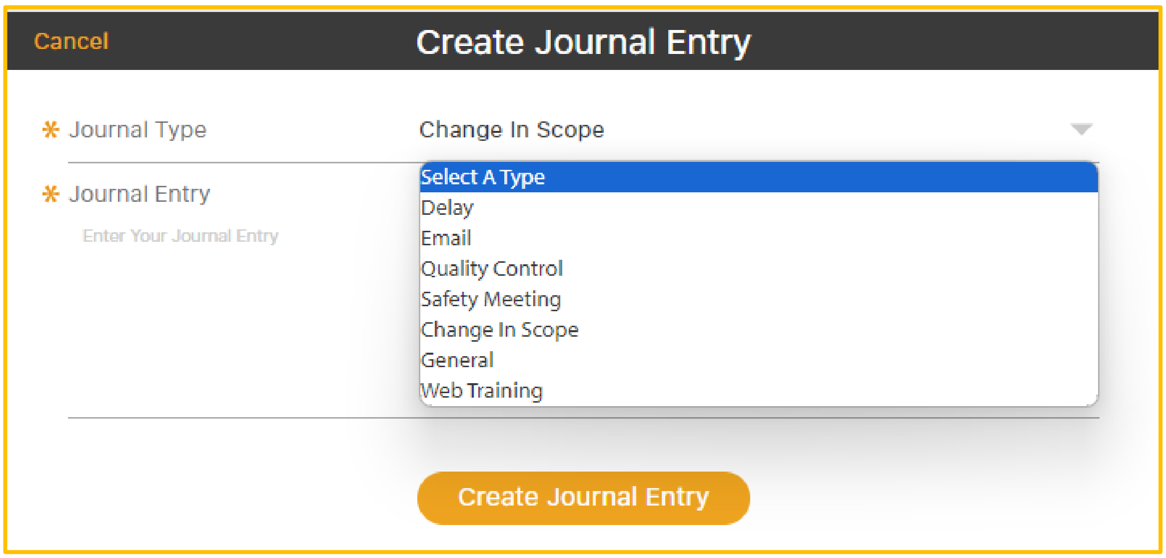
5. Enter the necessary data.
6. Select Create Subcontractor.
7. The Subcontractor information will then be displayed in the Subcontractors Section of the Daily Log.


(#00.100) Elementry School
Thu Nov 30, 2023 - Superintendent
Log Details
Weather
Labor
Remote Payroll
Subcontractors
Equipment
Activities
Materials
Enter keyword to search subcontractor entries
B & M Marble, Inc.
Modified By Kim Wild (kim) on Nov 30, 2023 at 1:34 pm .
Headcount: 5
Man-Hours: 82.00 Hours
Notes:
These guys are doing great. They are ahead of schedule. I would consider adding them to the preferred vendor list.

Journals Section

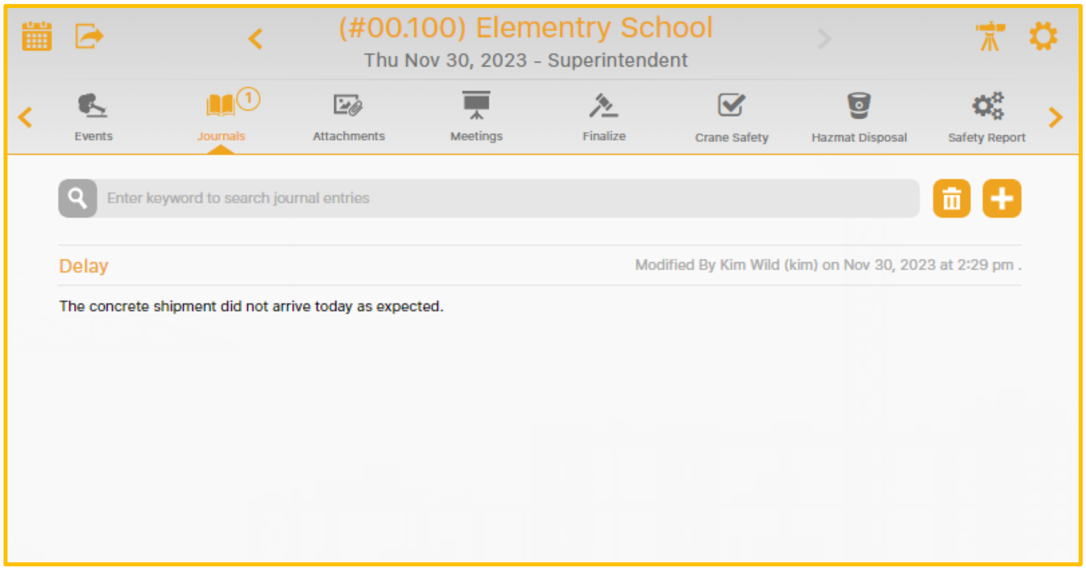
The Journals Section allows the user to log a variety of different Journal Types which are available with hh2 or can be customized to the construction company's preference. (FR>Settings>Type-Lists Setup>Journal Types).

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add journal data.
3. Select the Journals icon.
4. Select the Add + icon.



5. Select the Journal Type.
6. Write an Entry.
7. Select Create Journal Entry.

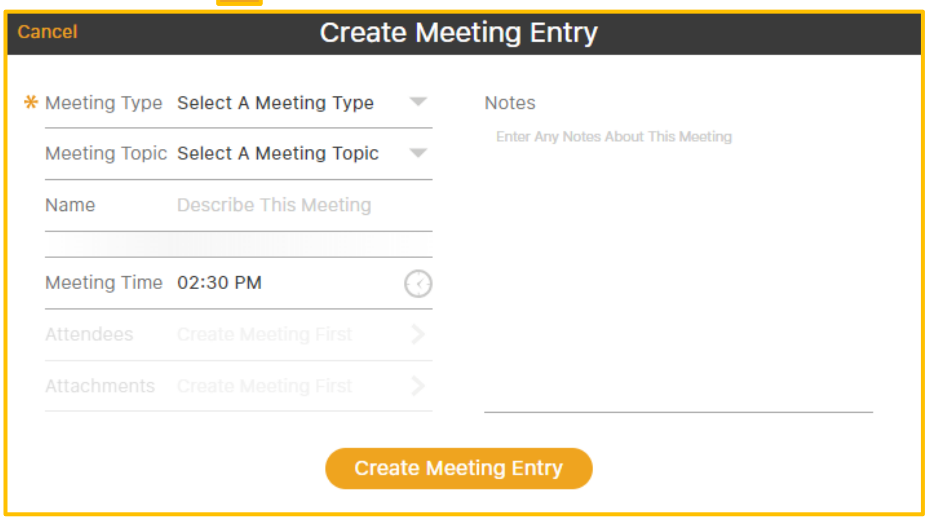
8. The information will then be displayed in the Journals Section of the Daily Log.



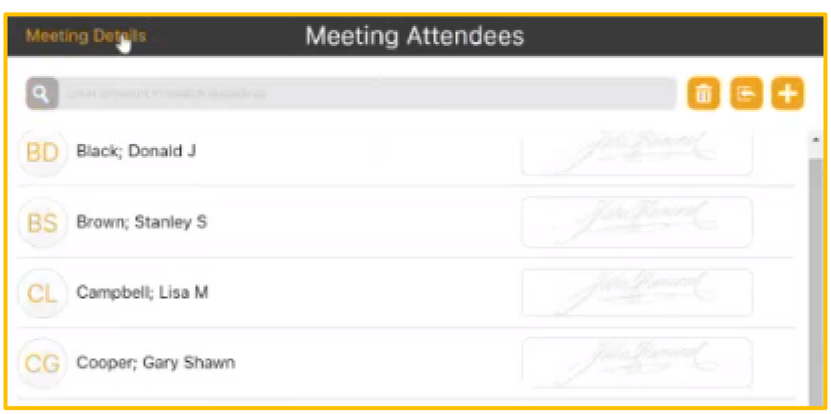
Meetings Section

The Meetings Section enables users to document meetings. The Meetings Section allows the user to log a variety of different Meeting Types and Topics which are available through hh2 or can be customized to the construction company's preference. (FR>Settings>Type-Lists Setup>Meeting Types and Meeting Topics).

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add meeting data.
3. Select the Meetings icon.
4. Select the Add + icon.



5. Enter the Meeting information and Notes.
6. Select Create Meeting Entry.
7. Select Attendees. Attendees can be selected from the employee list or by entering the employee's name in the search field. This list is pulled from the accounting system address book.

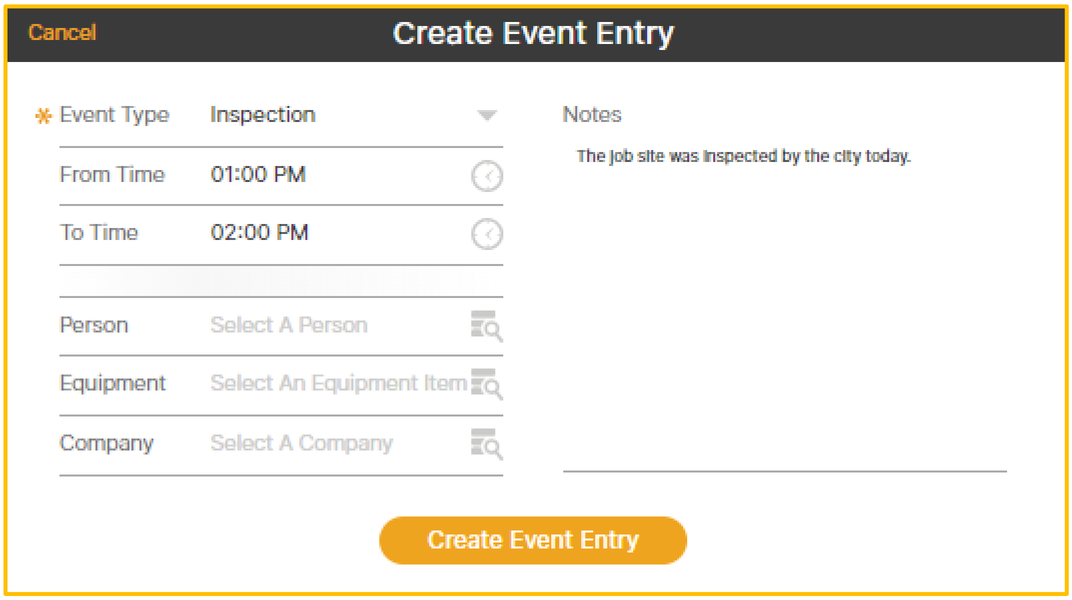


8. Meeting Attendees can sign their name with a mouse indicating they have attended the meeting using the Signature field.
9. Select Accept Signature.

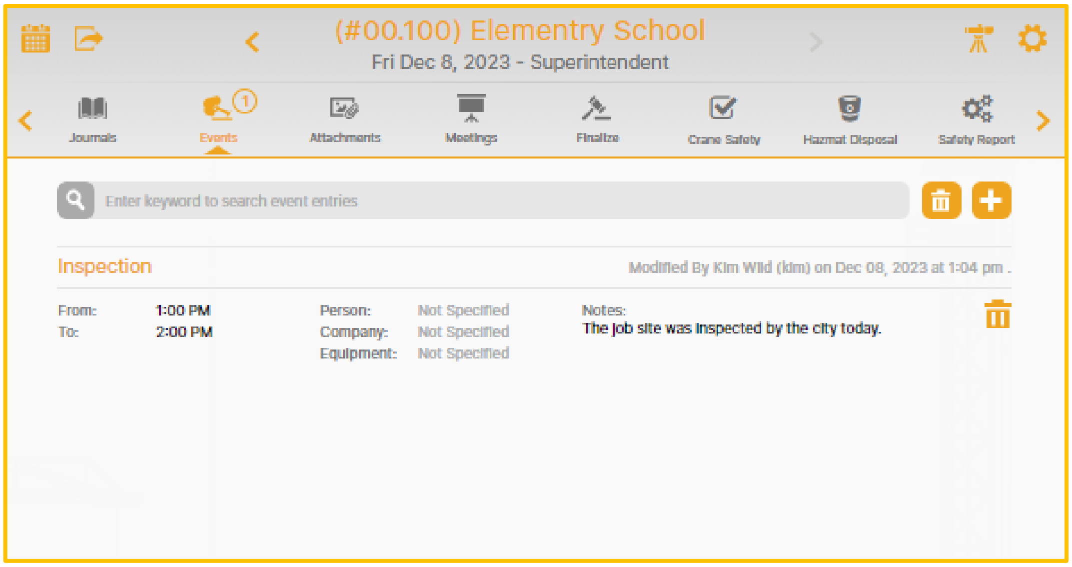
Events Section

The Events Section can be used for events like injuries, inspections, employee dismissals, or ribbon cuttings.

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add event data.
3. Select the Events Events icon.
4. Select the Add + icon.



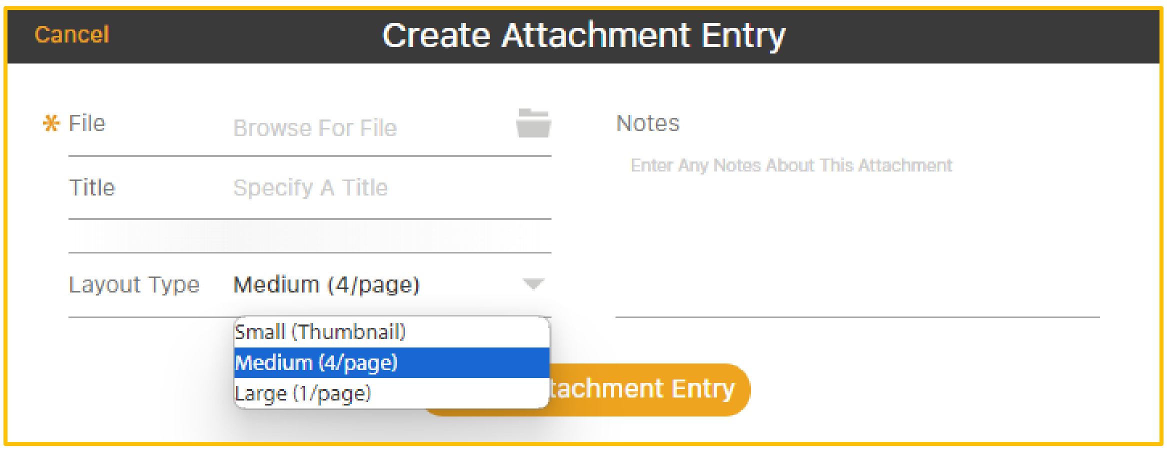
5. Enter the Event information and notes.
6. Select Create Event Entry.
7. The Event will then be displayed in the Event Section of the Daily Log.


(#00.100) Elementry School
Fri Dec 8, 2023 - Superintendent
Journals
Events
Attachments
Meetings
Finalize
Crane Safety
Hazmat Disposal
Safety Report
Enter keyword to search event entries
Inspection
Modified By Kim Wild (kim) on Dec 08, 2023 at 1:04 pm .
From: 1:00 PM
To: 2:00 PM
Person: Not Specified
Company: Not Specified
Equipment: Not Specified
Notes:
The job site was inspected by the city today.

The Attachments Section

The Attachments Section allows the user to attach documents and specify the title and layout of the document. It includes a Notes area for additional information.

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add attachments.
3. Select the Attachments icon.
4. Select the Add icon.



5. Browse for a File.
6. Select the File.
7. Select Open.
8. Enter a Title.
9. Select the Layout Type.
10. Add any Notes.
11. Select Create Attachment Entry.

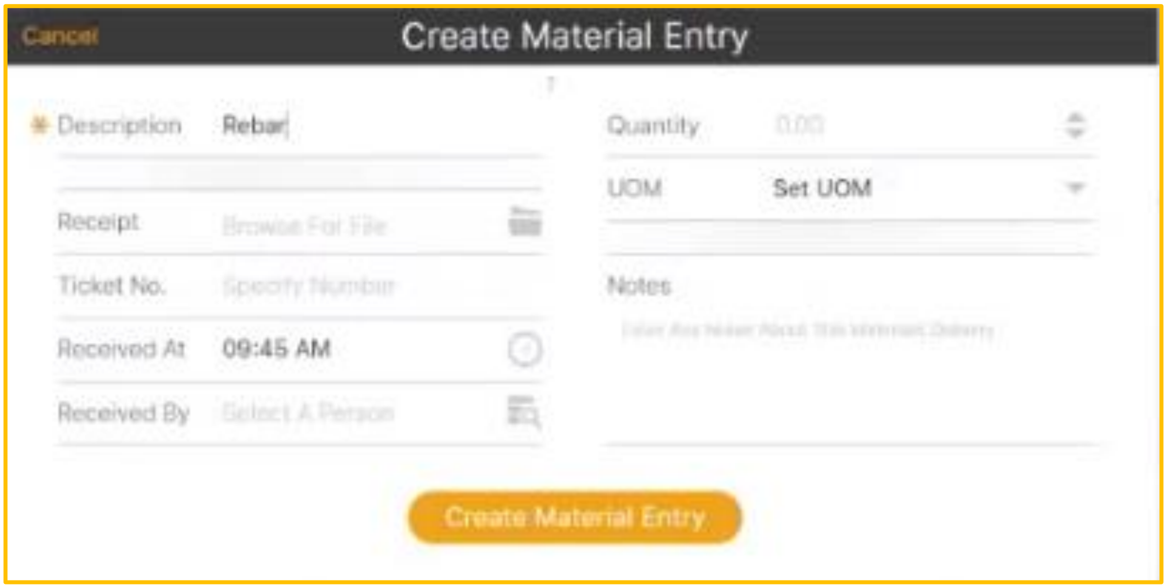
The Attachment Section also offers the ability to add documents in batch. Follow the above steps except choose the Batch icon instead of the Add icon.

Note: Attachments will be added in the order that they are uploaded into hh2, not by the date the file was created.

Materials Section

The Materials Section is utilized to track materials and related receipts or pictures of material delivered.

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add materials.
3. Select the Materials icon.
4. Select the Add + icon.



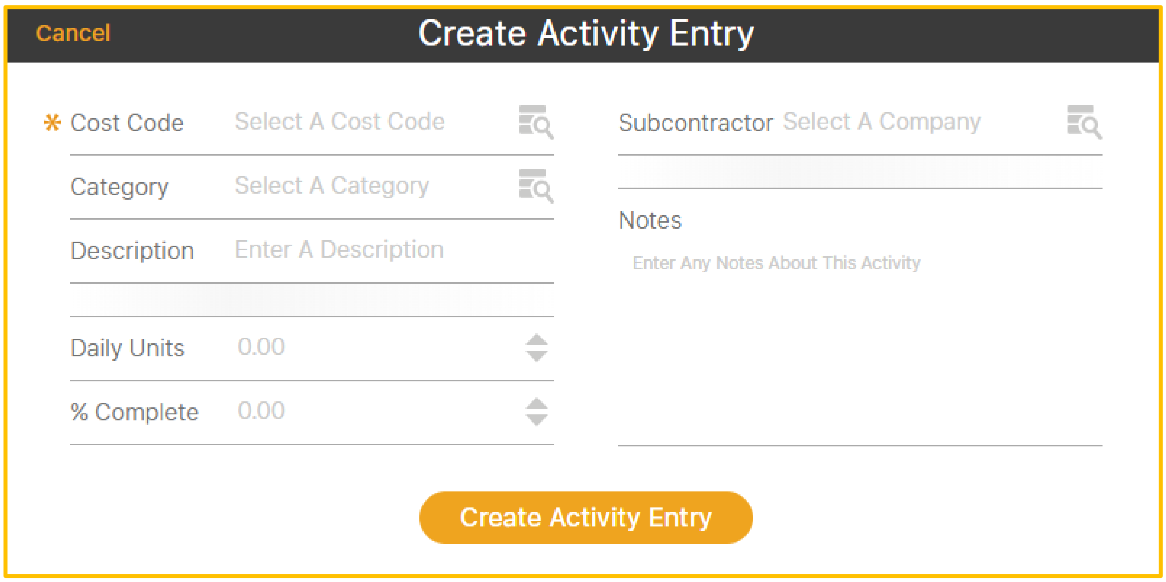
Enter the Description of the material.

5. Browse for a photo or receipt by selecting Browse for File, select the file, select Open (optional).
6. Enter a ticket number.
7. Enter the time the material was received.
8. Enter by whom it was received.
9. Enter a quantity.
10. Enter the Units of Measurement (UOM).
11. Enter Notes, as needed.
12. Select Create Material Entry.
13. The entry will now be displayed on the Materials Section of the Daily Log.

The Activities Section

The Activities Section is utilized to track Unit Production. Unit Production is utilized to track completion by either daily units or percentage complete. Unit Production is tied Cost Codes.

1. Navigate to the Daily Log (FR>Daily Logs>Daily Log Calendar)
2. Create a log if none exists or choose an existing log to add materials.
3. Select the Activities icon.
4. Select the Add + icon.

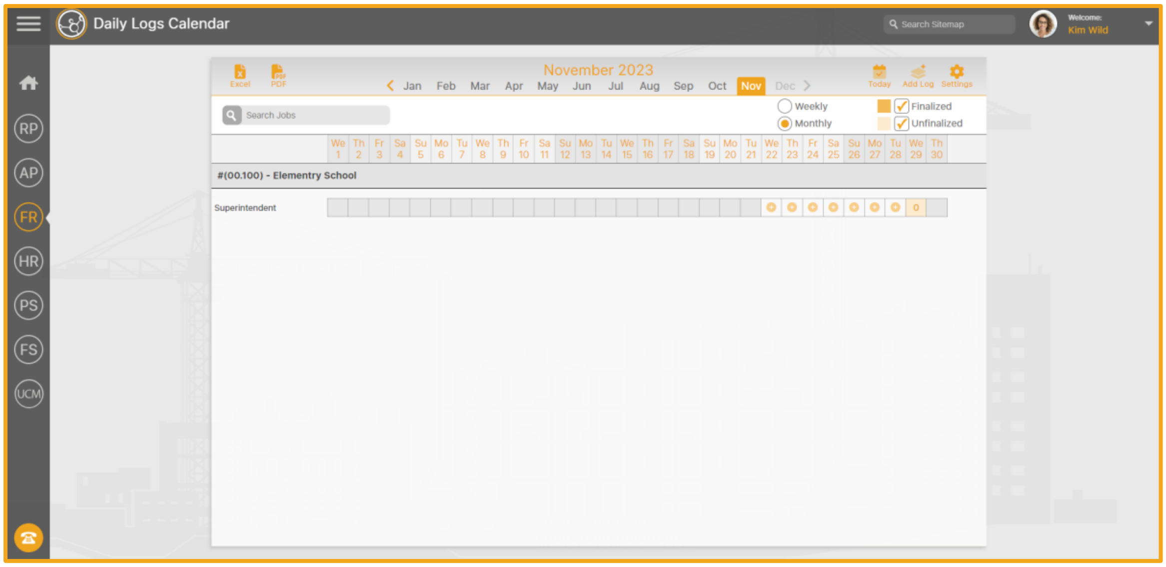


5. Enter the required Cost Code.
6. Enter a Category.
7. Enter a Description.
8. Enter the Daily Units.
9. Enter a % Complete.
10. Enter the Subcontractor.
11. Enter Notes.
12. Select Create Activity Entry.
13. This creates an entry on the Unit Production Worksheet. Likewise, information from the Unit Production Worksheet is displayed in this section.

Step 2: View and Edit Daily Logs on the Daily Logs Calendar

The Daily Logs Calendar allows the user to view and edit Field Reports on a Weekly or Monthly view.

Navigation: FR>Daily Logs>Daily Logs Calendar



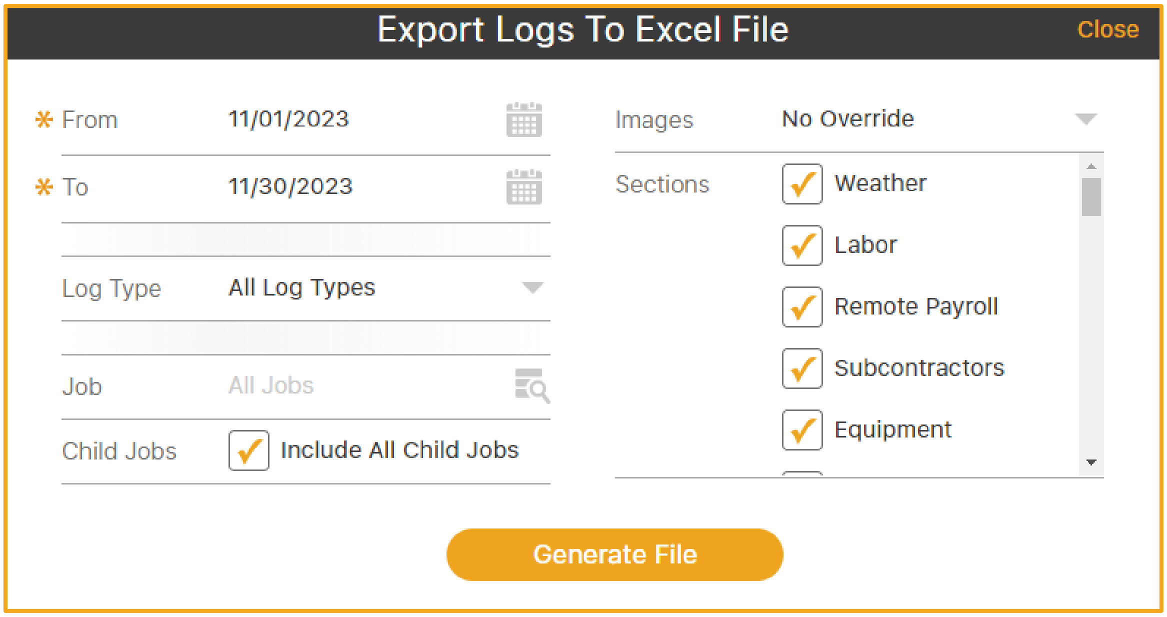
The Daily Logs Calendar allows the user to:

- Run an Excel Report for filtered information.
- Create a PDF Report for filtered information.
- Search by Month for a Daily Log
- Search with Weekly or Monthly Views (toggle between the two)
- Search by current date for a Daily Log
- Add a Daily Log
- Select User Preferences for logs. **Note:** Reports will be printed in the order selected in the User Preferences.
- Filter logs by Jobs, Finalized and Unfinalized Logs.

Note: Any box with a number indicates there is a log for the specific date. The number indicates the number of items on the Field Report (Daily Log). When the Add icon is selected in a box, the system will create a log for that day. See Step 1: Create a New Daily Log.

To Create an Excel Spreadsheet from the Daily Logs Calendar:

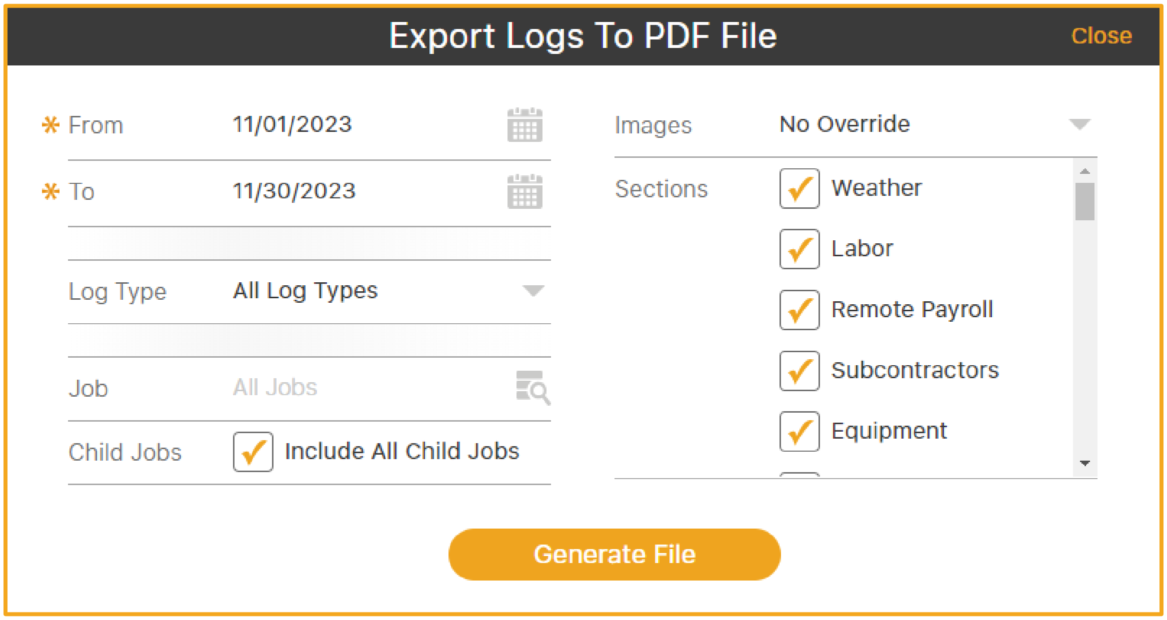
1. Select the Excel icon



2. . Select the appropriate filters from the available fields.
3. Check any sections to include in the report. Uncheck those Sections not needed.
4. Select Generate File.
5. Select Download File.
6. The Excel report can be found in the downloads file on the computer.

To Create a PDF from the Daily Logs Calendar:

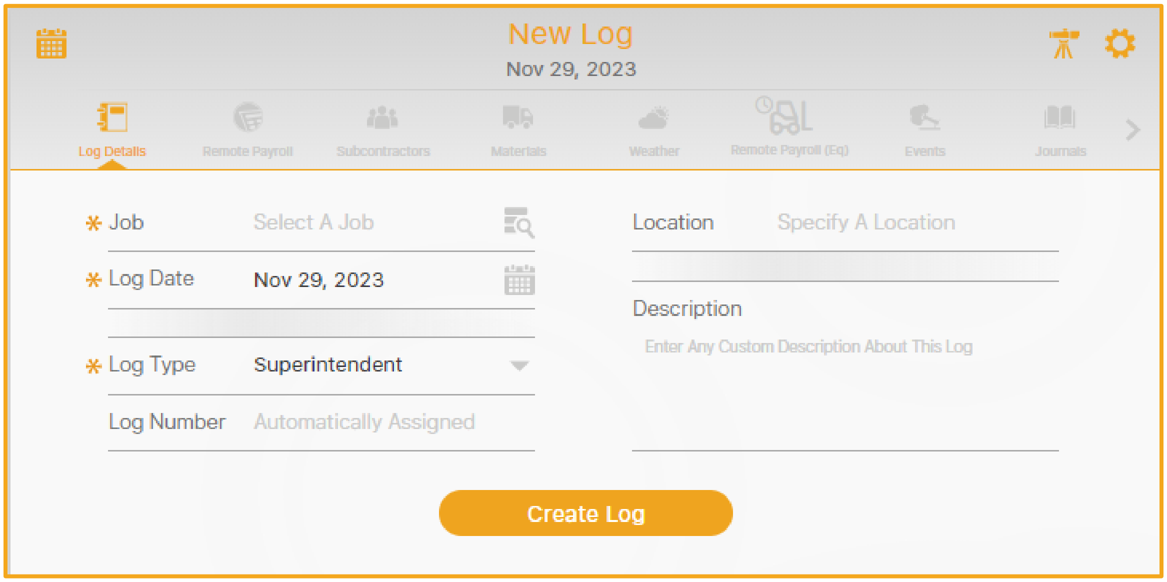
1. Select the PDF  icon.



2. Select the appropriate filters from the available fields.
3. Check any sections to include in the report. Uncheck those Sections not needed.
4. Select Generate File.
5. Select Download File.
6. The PDF report can be found in the downloads file on the computer.

To Add a New Log from the Daily Logs Calendar:

1. Select the Add Log icon.

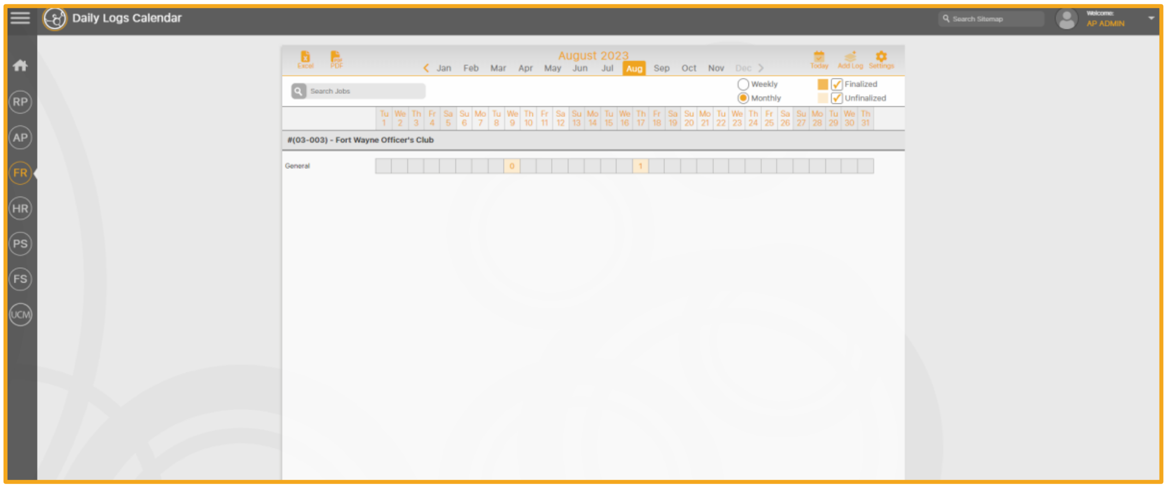


2. Select a Job.
3. The Log Date will default to the current date. Reports cannot be created for future dates but can be created for past dates.
4. Select a Log Type. The Log Type provides an effortless way to find reports. The Log Types in the Picklist are customizable. FR>Settings>Type-Lists Setup>Log Types.
5. The Log Number will automatically be assigned and populated.
6. A location and description may be added.
7. Select Create Log.
8. Once the Log is created, the user has access to the Sections of the report at the top of the Daily Log.
9. The Calendar icon will take the user to the Daily Logs Calendar, where it may be viewed.

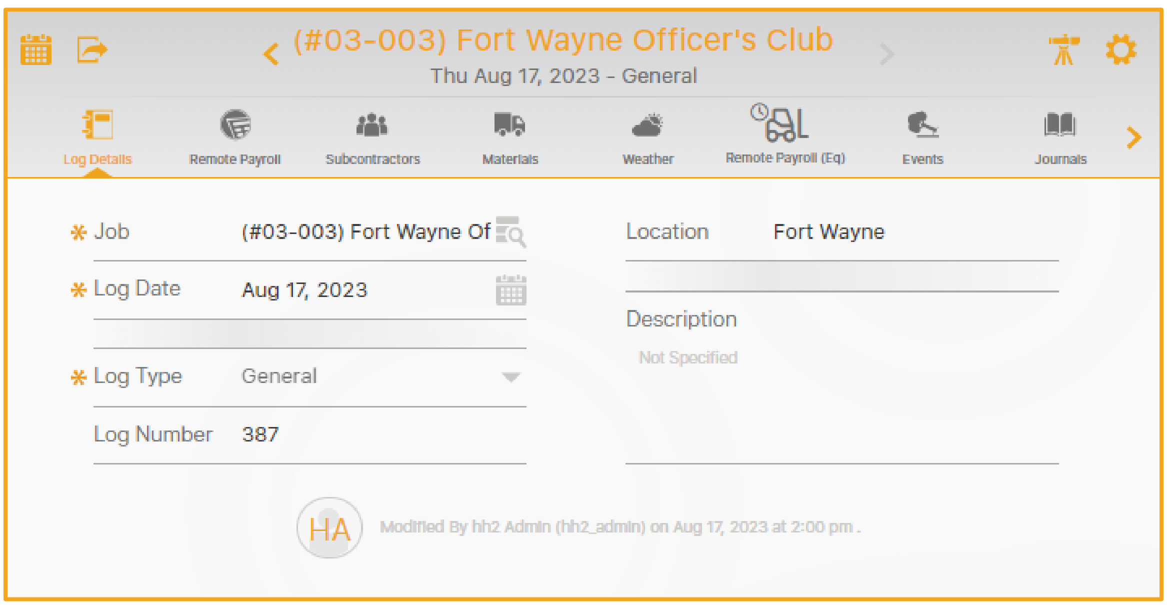
Note: The Job Explorer feature and User Settings can also be accessed from the Daily Logs Calendar, just as they are from the Create A New Log feature. See Job Explorer and User Settings.

To View Daily Logs from the Daily Logs Calendar:

1. Navigate to FR>Daily Logs>Daily Logs Calendar.
2. Filter by Month, Job, Finalized or Unfinalized Logs. Weekly and Monthly views can also assist in narrowing data.



3. A number in the daily box indicates a Daily Log is available. When selected the Daily Log displays.



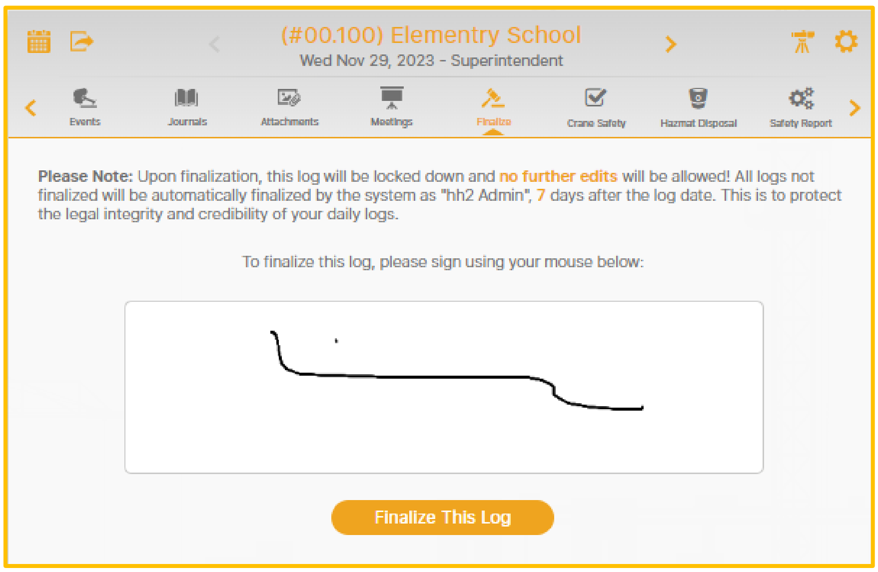
4. Select on the Field Report section icons to view detailed information. Based upon the section type, additional icons may be displayed on the page.

Step 3: Daily Log Finalization

The Daily Log must be finalized. Once a log is finalized it will be locked down and no further edits are allowed. Logs not finalized within the period specified in the System Setting (FR>Settings>System Settings>General Settings tab>Auto-finalize logs) will be automatically finalized by the hh2 system. This will protect the legal integrity and credibility of the Daily Log. However, there is the ability to add an addendum.

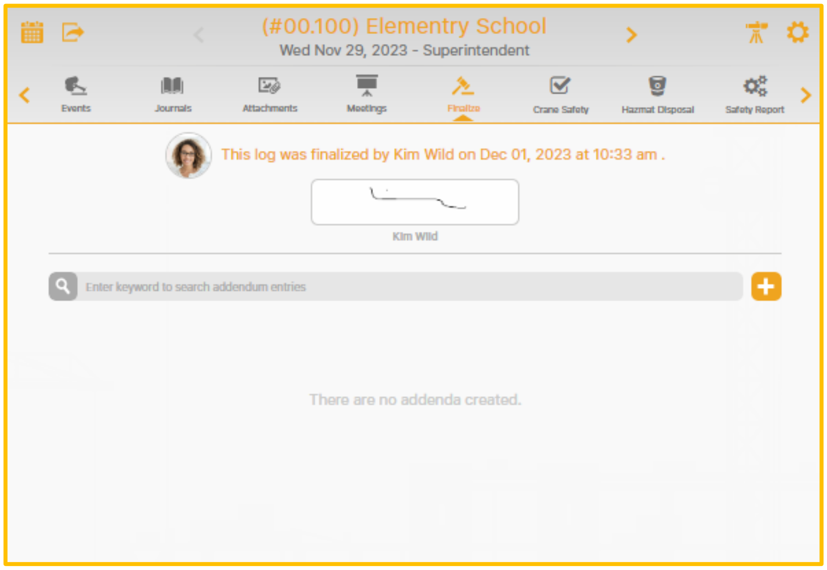
To Finalize a Daily Log Manually:

1. Select the Daily Log from the Daily Logs Calendar (FR>Daily Logs>Daily Logs Calendar>specific log).
2. Select the Finalize Section  icon.



3. Sign the log using the mouse.
4. Sign the log.
5. Select Finalize This Log.

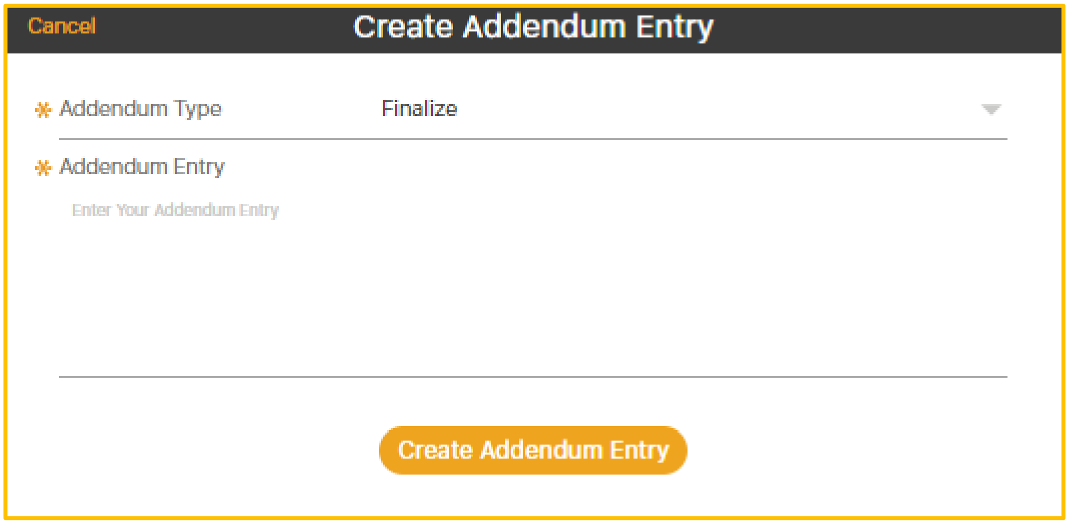
Note: No signature will be captured if the Finalization process is completed by the automated hh2. All logs that were finalized by the automated hh2 process, will read, “This log was finalized by hh2 Admin on [date] at [time].”



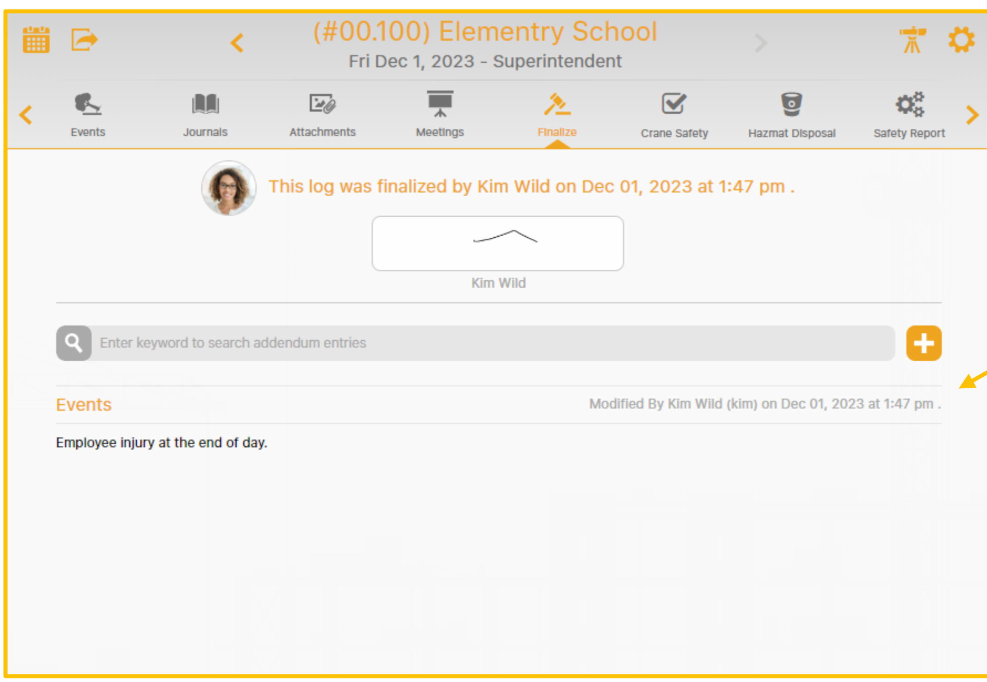
6. Once finalized, all Add and Delete icons are removed from the Sections. It becomes view only. However, addendums can be added.

To Add an Addendum:

1. Select the Add + icon from the Finalized Page.



2. Enter the Addendum Type.
3. Enter the Addendum Entry.
4. Select Create Addendum Entry.



5. Addendums will be date and time stamped.

Step 4: Reporting

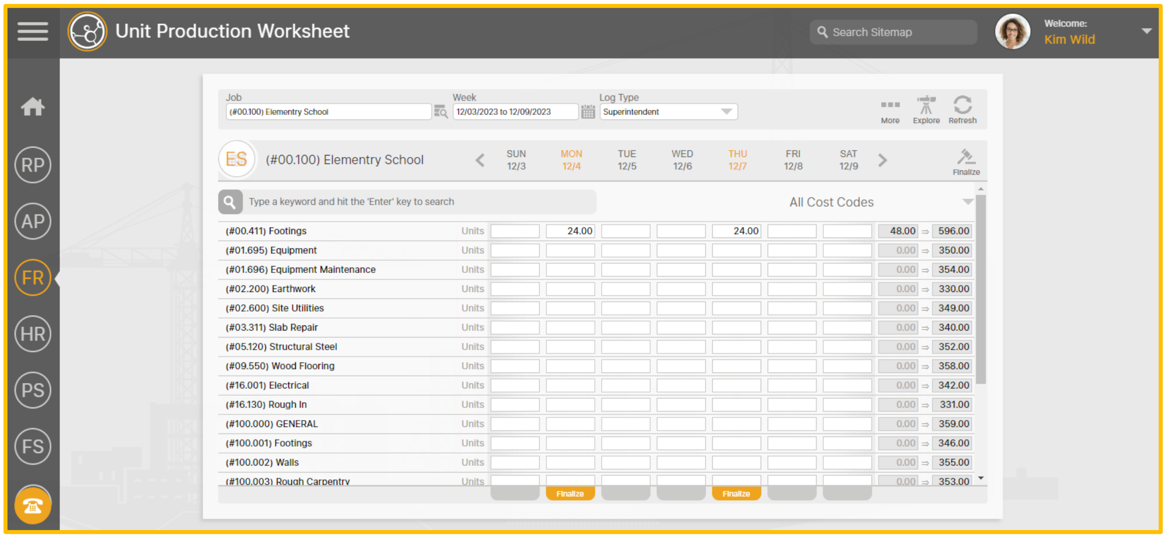
Before and after finalization Field Reports may be generated into Excel Spreadsheet and PDF reports. See to Create an Excel Spreadsheet from the Daily Logs Calendar and to Create a PDF from the Daily Logs Calendar.

Other Field Report Features

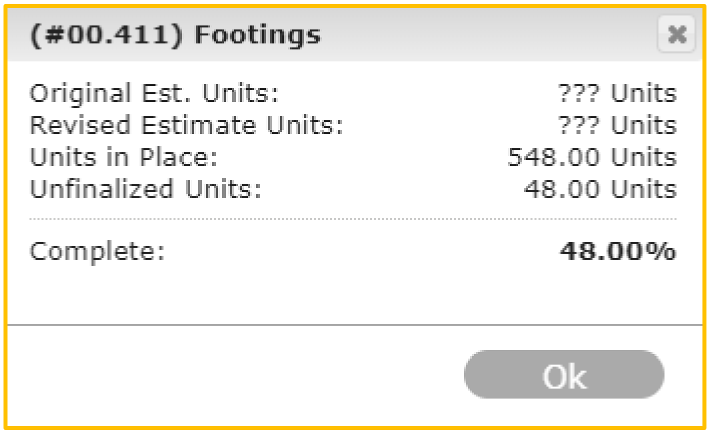
Unit Production Worksheets

Navigation: FR>Unit Production>Unit Production Worksheet

The purpose of the Unit Production Worksheet is to assist in quantifying work tasks using standardized units, such as square footage or linear feet. This is done by cost code. Examples of cost codes may include work tasks such as installation of electrical, dry wall and footings for instance.



- The Unit Production Worksheet can be searched by Job, Week, and Log Type. Cost codes may be searched for using the Search field.
- Units are entered by day with a weekly total displayed next to the last day of the week. Additionally, Units in Place (the total amount used against the budget) are displayed in the most far right column.
- Further detail can be found by selecting a specific cost code with a click.



When a specific cost code is selected with a click the following information is displayed:

- Original Estimated Units represents the original estimated budget for the cost code (this is stored in the Sage 300 accounting system).
- Revised Estimate Units represent any revisions made to the estimated budget for the cost code (also stored in the Sage 300 accounting system).
- Units in Place represents the remaining units for the budget.
- Unfinalized units represent units not yet finalized and thus not accounted for in the accounting system.

Note: A discrepancy in units will be observed until the Unit Production Worksheet has been finalized.

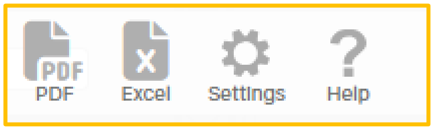
Note: Finalizing the Unit Production Worksheet will finalize all sections of the Daily Log for the day. It is best practice to finalize logs from the Daily Logs Calendar (FR>Daily Logs>Daily Logs Calendar). If finalization occurs from the Unit Production Worksheet, all other sections will be locked for the corresponding Daily Log.

Note: It is important to keep the Unit Production Worksheet updated daily, or the data becomes out of sync with the accounting system and therefore irrelevant.

Note: The Activities Section and the Unit Production Worksheet contain the same information. When one is updated, so is the other.

Tools Available from the Unit Production Worksheet

When More… is selected from the Unit Production Worksheet additional tools become available.



To Create a PDF Containing Unit Production Worksheet Data:

1. Select More…from the Unit Production Worksheet in the right-hand corner.
2. Select PDF icon.
3. This file will be found in the downloads folder of the user's computer.

1

hh2 Demo Company
Superintendent

940 North 1250 West
Centerville UT 84014

Dec 04, 2023

Daily Log: #5607 (#00.100) Elementry School

Activity

Name Of Company:

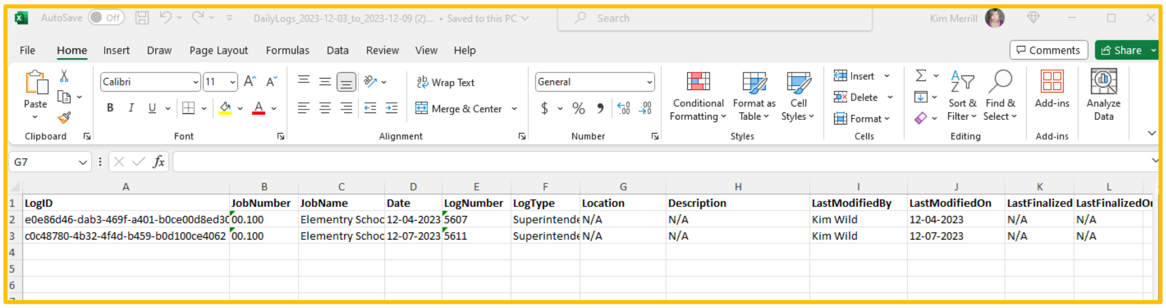
Last Edit: Dec 04, 2023 03:48 PM America/Denver
Wild: Kim

Percent Complete: 50.00 **Product Unit:** 24.0000

Cost Code: (#00.411) Footings **Category:** (#L) Labor

To Create an Excel Spreadsheet Containing Unit Production Worksheet Data:

1. Select More…from the Unit Production Worksheet in the right-hand corner.
2. Select the Excel  icon.
3. This file will be found in the downloads folder of the user's computer.



User Settings

Select the Settings icon to access the User Settings Page where users may set their own specific settings to their preference. These are identical to the User Settings on the New Daily Log (FR>Daily Logs>Create a New Log). See User Settings.

Job Explorer

Just like the Job Explorer on the Create a New Log Page, a Job Explorer exists on the Units Production Worksheet. See Job Explorer.

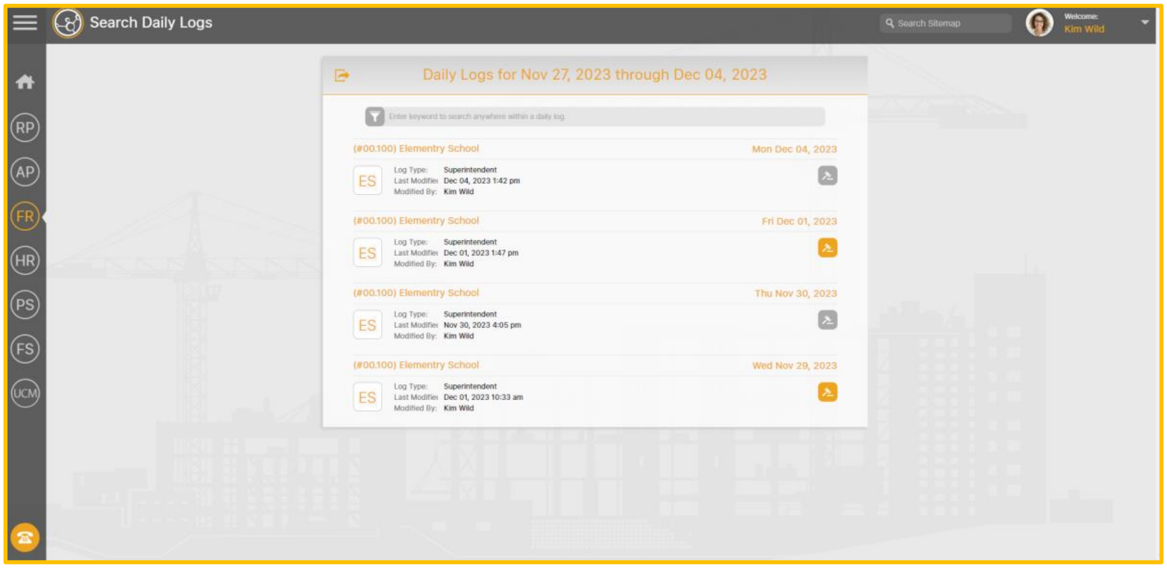
Refresh

The Refresh icon is used universally throughout the hh2 system and refreshes data on the page.

Search Daily Logs

Navigation: FR>Enterprise Logs> Search Daily Logs

The search Daily Logs feature allows users to search for Daily Logs.



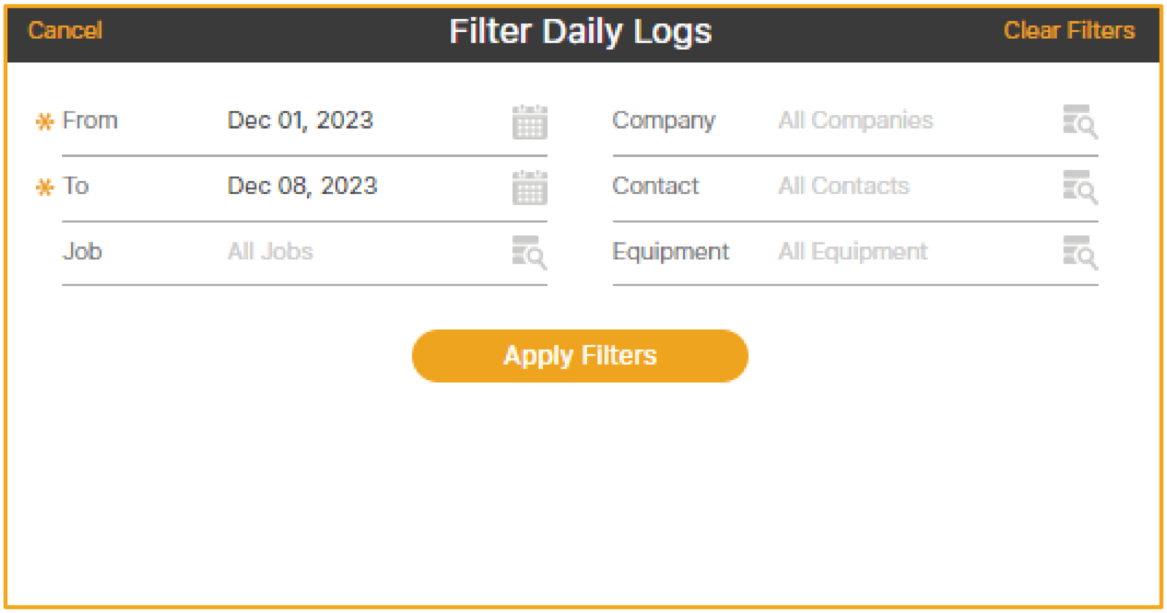
The Filter feature allow users to search for Daily Logs by:

- Date Range
- Job
- Company
- Contact
- Equipment

Likewise, Logs may be finalized from the Search Daily Logs Page and exported to PDF and Excel.

To Search Using the Filter Feature:

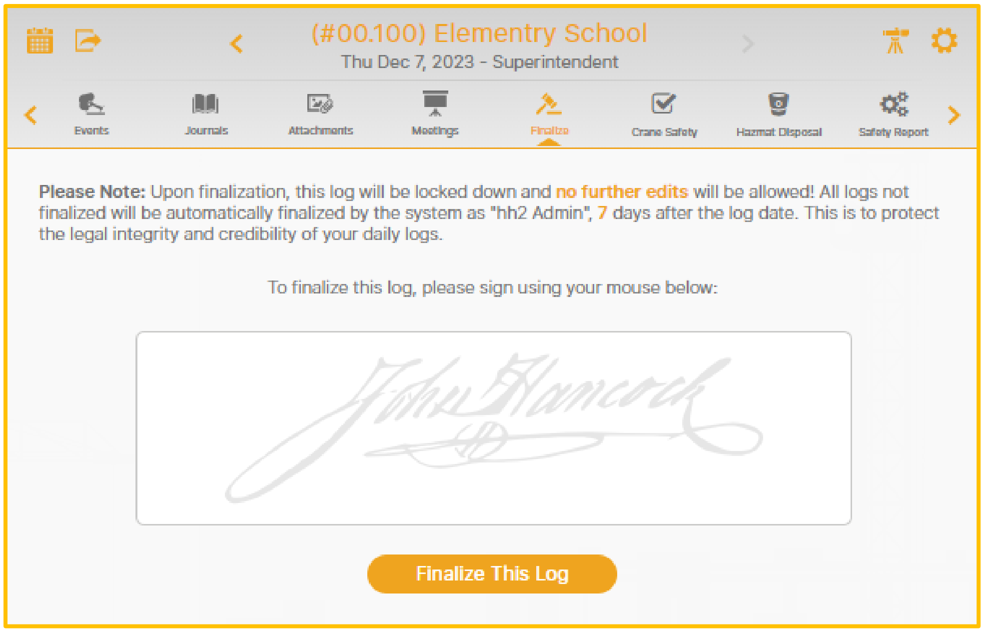
1. Select the Filter  icon form the Search Daily Logs Page.



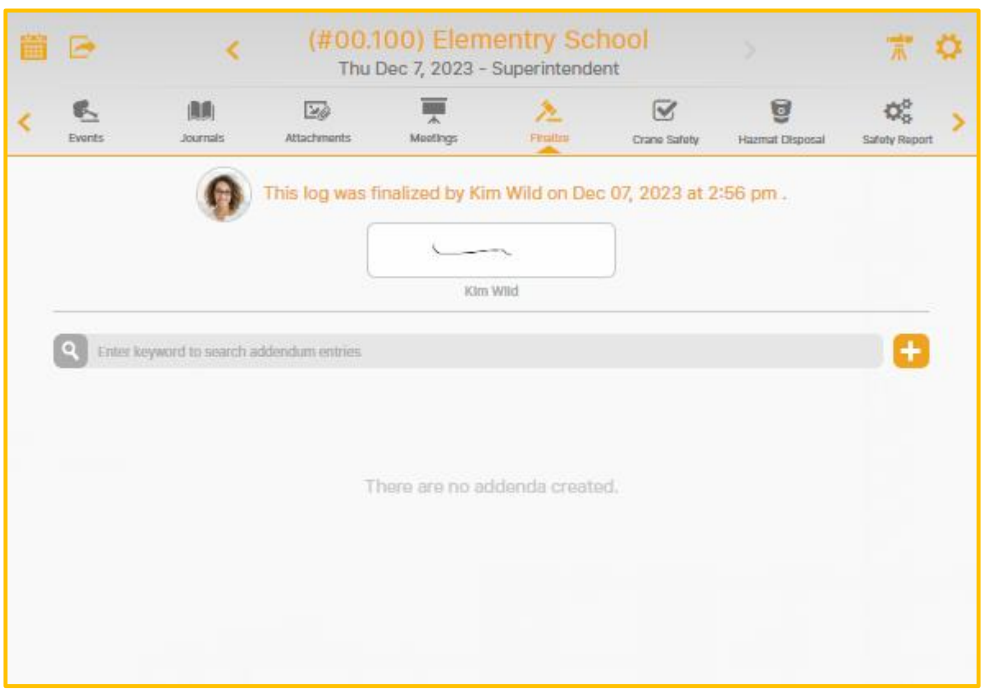
2. Select the required From and To Dates.
3. Enter data in the other fields, as needed to narrow the search.
4. Select Apply Filters.
5. All logs meeting the criteria will be displayed.

To Finalize Logs from the Search Daily Logs Page:

1. Use the Search field and filter to locate the Daily Log to finalize.
2. Select the Finalize  icon.

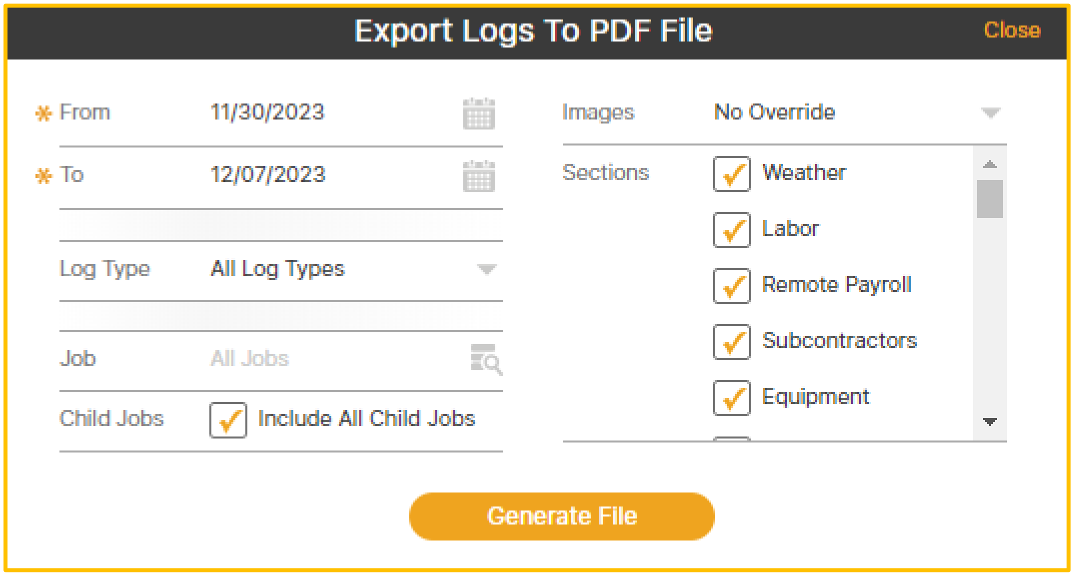


3. Sign the log.
4. Select Finalized This Log.

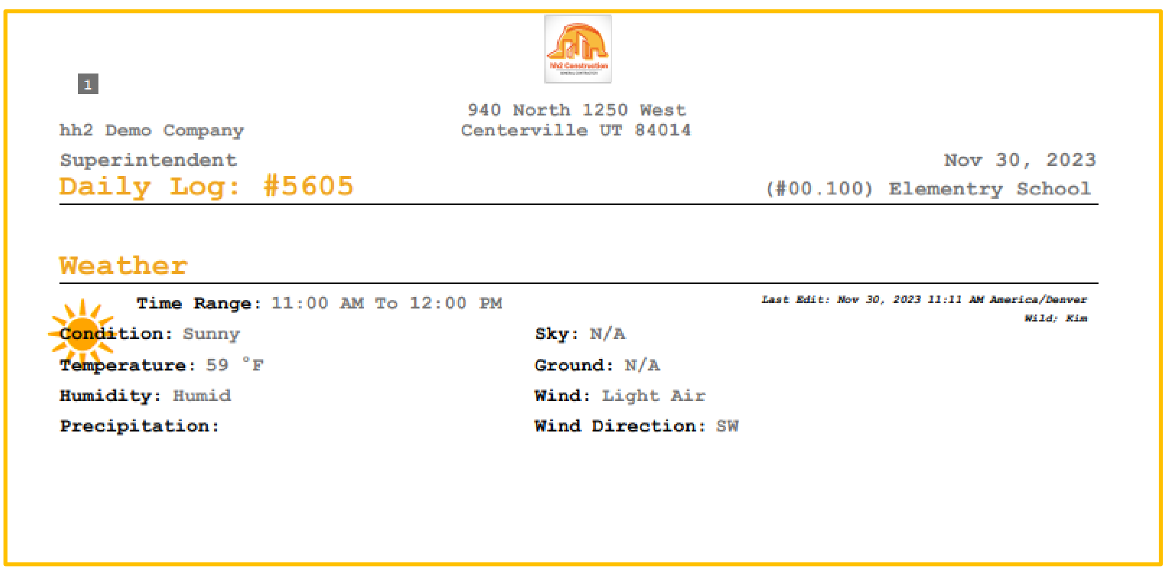


To Export Daily Logs from the Search Daily Logs Page to PDF:

1. Select the Export icon.

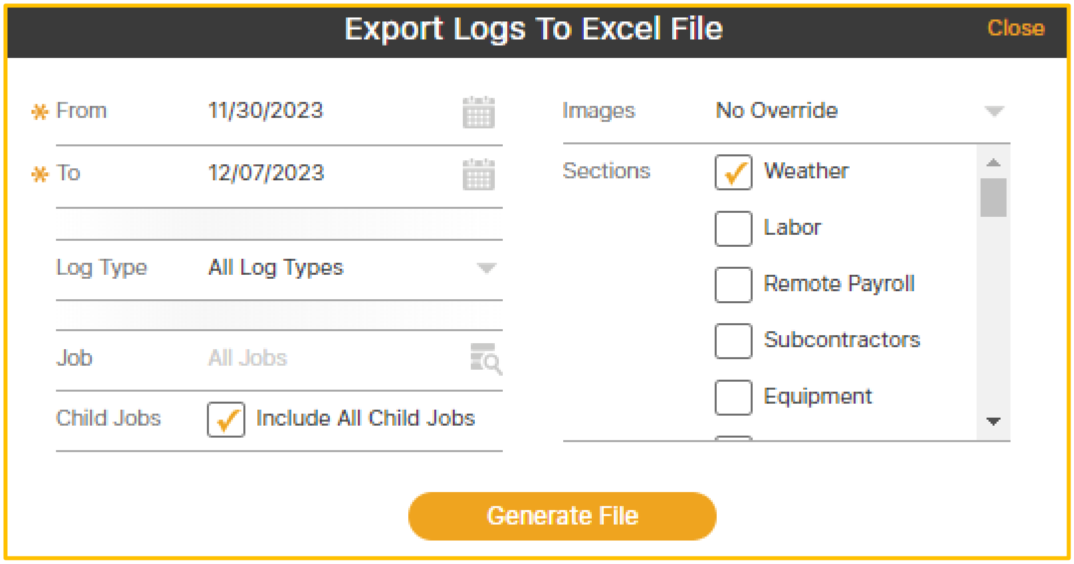


2. Filter using the fields on the Export Log to PDF File Page.
3. Select Generate File.
4. Select Download File.
5. The file can be found in the Downloads folder on the user's computer.
6. Daily Logs for each filtered Section display in PDF format.

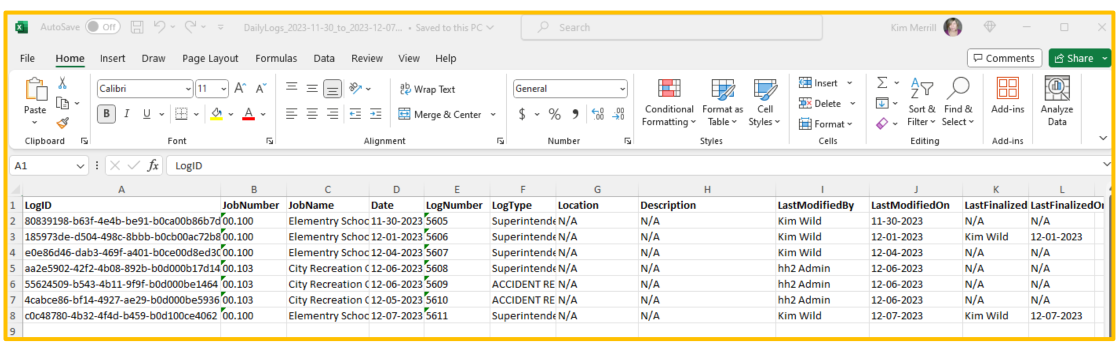


To Export Daily Logs from the Search Daily Logs Page to Excel:

1. Select the Export icon.



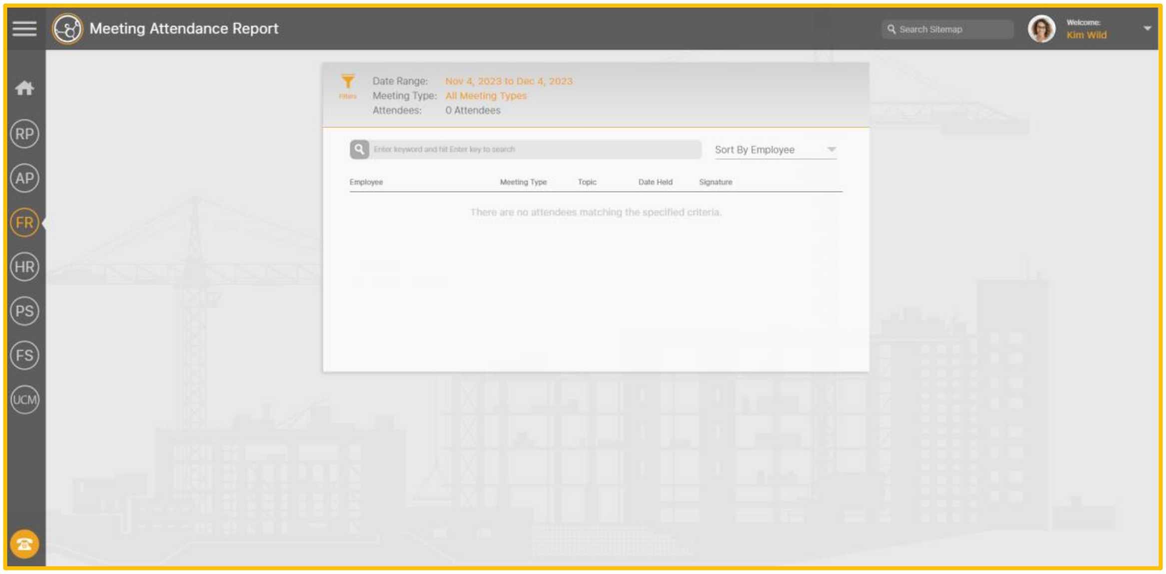
2. Filter using the fields on the Export Log to Excel File Page.
3. Select Generate File.
4. Select Download File.
5. The file can be found in the Downloads folder on the user's computer.
6. Daily Logs for each filtered Section display in an Excel spreadsheet.



Meeting Attendance Report

Navigation: FR>Enterprise Logs>Meeting Attendance

The purpose of the Meeting Attendance feature is to quickly determine who attended meetings. **Note:** The Meetings Section must be enabled and used for the Meetings Attendance Report to function.

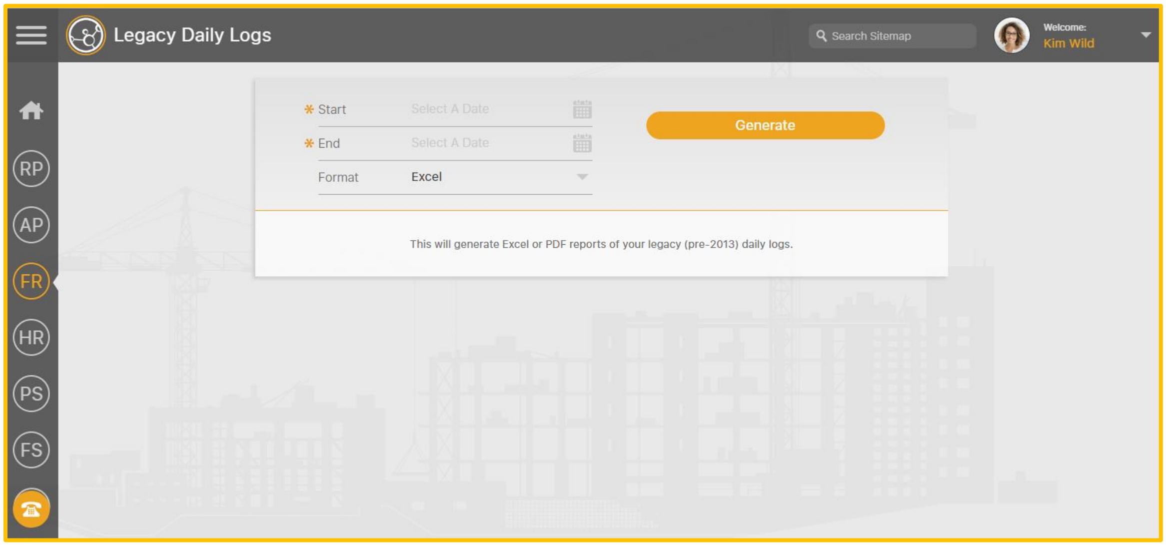


Meetings may be sorted by Employee, Date or Meeting Type and the Search field may be used to locate specific employees, dates, or meetings.

Project Reports (Legacy Logs)

Navigation: FR>Project Reports>Legacy Logs

The purpose of Legacy Logs is to access Daily Logs predated to 2013.



To Access Logs Earlier than 2013:

1. Select a Start and End Date in the associated fields.
2. Select the report format either Excel, or PDF.
3. Select Generate.

Mobile Apps

The hh2 Field Reports mobile app can be downloaded for Apple iOS iPhone and iPad, as well as the Android Phone and tablet. Field users typically use the mobile application. See the Field Reports User Guide for Field Users.

Summary

The Field Reports module streamlines field construction management especially for mid-level managers through a four-step process. It begins with the creation of detailed daily logs, progresses to viewing and editing these logs in real-time, culminates in the finalization of logs for accuracy, and concludes with the generation of insightful reports on project progress and job site conditions. This efficient feature enhances documentation, decision-making, and communication within the construction project.

Please feel free to submit any comments, or issues regarding this documentation to documentation@hh2.com

Glossary of Terms

Note: This includes terminology for all hh2 modules as well as some industry language.

AB Locations: This term is utilized in the hh2 HR module. AB (Address Book) Locations can be used to assign an employee to a particular location. For instance, a home office or state location.

Acceptance Group: In the document Acceptance step in the Document Flow (AP) module, multiple Acceptance Groups can be set up so that larger companies can divide new invoices into groups for more orderly processes. This is frequently done when the company has multiple physical office locations, multiple business entities, or multiple divisions within the company. Using Acceptance Groups, AP Clerks can process invoices for their own office, entity, or division and not get documents outside their jurisdiction.

Accounting System: For the purposes of this document, the accounting system is the construction company's Enterprise Resource Planning System. See ERP.

Accrual: This term is used in the HR, Remote Payroll and Pay Stubs modules. It refers to the accumulation or gradual increase of benefits or earned time off over a specific period, typically based on the length of an employee's service or time worked.

Admin or Administrator: An employee at a construction company that has a high level of permissions within the hh2 system. This individual can create users and set permissions for users. Likewise, this individual can configure certain portions of the hh2 system. This person is different from both the hh2 Admin and the System Administrator. See hh2 Admin.

AP Clerk: An AP Clerk is a user at the construction company that has permissions to perform some aspect of the invoice processing within hh2 Document Flow. Permissions can be set up to allow or deny AP Clerks access to portions of the software. This allows hh2 customers to configure AP Clerk permissions around their unique needs.

AP Group: This term is used in the Document Flow module. AP Groups are set up so that users can be given permissions based on the roles that they fill within the company. For example, an hh2 customer might set up a Field Supervision group and add all foremen and superintendents to it, so they only need to grant access to the accounting codes once.

AP Manager: This individual is someone at the construction company that has high levels of access and permissions within hh2 Document Flow. They oversee the processes of managing recipients, reimbursements, and invoices.

AP Page: This is the landing page of the hh2 system's Document Flow (AP Module). The AP Page is where the user can access features and functionality of the Document Flow Module. Each user's AP landing page will display based on the permissions granted to them**. Note:** The terms AP and Document Flow are used interchangeably within the hh2 system. See Document Flow.

Approval Path: In the Remote Payroll module, the Approval Path is configured based on the construction company's needs and preferences, dictating the flow of time approval. The Approval Path can be established according to employee levels, group manager roles, or job manager roles. It is also structured in levels.

Attendance Punch Clock: In the Remote Payroll module, the Attendance Punch Clock captures time for Payroll Managers or Administrators to review. Coding is not captured with this feature. This should not be confused with the Punch Clock feature, which does capture coding.

Bank: The Financial Institution the construction company processes their credit card transactions through

Batch: Processing more than one piece of data at a time. This term typically refers to large numbers of invoices, receipts, or other financial instruments and time managed by hh2.

Cardholder: This term is used in the Document Flow (AP) module. This is the individual whom the credit card is assigned to in the Document Flow User Setup. This is also the person using the credit card for purchases, and who will upload the credit card receipts into hh2. **Note:** AP Administrators and AP Managers may also upload credit card receipts for the cardholder.

Categories: Some accounting systems have a customizable layer between Cost Codes and Cost Types. This enables a contractor to distinguish between multiple categories of the same Cost Type. For example, there might be two labor categories that accumulate to the Labor Cost Type, one for regular labor, one for overtime. A Contractor may budget for this ahead of time if they know the job will be on a tight deadline.

Certified Work: Work that the government guarantees an assured wage for certain types of work (by Certified Class) for government Jobs. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Davis Bacon or Prevailing Wage Work.

Child: In construction and business, structures often follow a hierarchical format, which means they are organized in a clear and structured manner with parent and child relationships. In the business realm, this can be observed in the presence of subsidiary companies operating under a larger parent company. Similarly, in data management, certain abstract concepts are categorized as child entities under a larger entity. For example, in construction projects, Extras or Sub Jobs can be considered as child entities of a more comprehensive Job. Furthermore, Cost Codes may serve as child entities tied to the specific Job. The term "Parent" is used to denote the larger, overarching entity in these hierarchical structures. Also see Parent.

Commitment: In hh2, this term is often used interchangeably with "Purchase Order." It is an official document issued by a General Contractor to a Subcontractor or Supplier outlining the specifics of the commitment to perform labor or purchase materials. Commitment Items will include specifics like quantities, prices, and delivery terms.

Cost Code: Also referred to as "Phase Codes," Cost Codes are used as part of a Job Cost system to track the costs of a Job. In construction, many companies opt to use the standardized CSI Divisions as cost codes. For example, the CSI Division for Concrete is "03" and the Section for Decks is "500", so the cost code of "03-500" is for Concrete Decks. The fundamental purpose of cost codes is to track all job-related expenses in an orderly fashion that is consistent across all jobs, enabling complex cost management, reporting, and analysis.

Cost Types: Cost Types accumulate expenses under cost codes and categories using fixed types of costs. Common examples of Cost Types include Labor, Materials, Equipment, Overhead, Subcontract, and Misc/Other. Some construction ERPs allow partial customization of Cost Types instead of supporting Categories. When Categories are used for coding, there is no need to use Cost Types as all categories have a fixed Cost Type.

Credit Card Transactions: This term is used in the Document Flow (AP) module**.** It is a financial transaction in which a cardholder uses their credit card to make a purchase or payment, with the promise to repay the card issuer later. In hh2, the AP Administrator or AP Manager will upload these transactions from the bank into hh2 and the system will match them with receipts uploaded by the cardholder.

Crew Punch: In the Remote Payroll module, the Crew Punch feature allows a manager to punch all employees, designated to a certain Payroll Group, in or out at once.

CVS (Comma-Separated Values) File: A plain text file format used to store and exchange structured data, where each line represents a record, and fields within each record are separated by commas. This term is used in the Document Flow (AP) module.

Daily Logs/Field Reports: Within the Field Reports module, these terms are used interchangeably to reference construction logs that allow for reporting of a variety of variables on or off the job site.

Data Entry: This term is used in the Document Flow (AP) module. In hh2, Data Entry is the second step in the Document Flow-Invoice Process. It includes reviewing the Invoice, and coding data into the Header and entering full or partial Distributions. Typically, Data Entry is performed by AP staff before sending the invoice down the customizable Workflow. Much of the Header can be automated by using OCR and Autofill features of hh2 Document Flow. Often, the distribution coding during Data Entry is limited to just assigning a Job, and the detailed distribution coding is done during the workflow process by those assigned to manage the Job, such as a Superintendent or Foreman for smaller Jobs. The last step of Data Entry is choosing which workflow that should be used for approval or rejection if the default needs to be overridden.

Davis Bacon: Work where the government guarantees an assured wage for certain types of work (by Certified Class) on government. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Certified Work or Prevailing Wage Work.

Decrement: This term is used in the HR and Pay Stubs modules. It refers to the reduction or deduction of accumulated time off from an employee's leave balance.

Distribution: In the context of AP Invoices, Distribution refers to the allocation or assignment of costs to various Commitments, Jobs/Projects, Cost Codes, Categories or G.L. Accounts within a construction company. This process is essential for accurately tracking the financial performance of different Jobs/Projects and segments of the business. In hh2, Distributions are partially coded during the Data Entry step and final coding of Distributions can occur during the Workflow phase of the hh2 Document Flow-Invoice Process.

Distribution Split: This term is used in the Document Flow (AP) and Remote Payroll modules. When a single invoice must be coded to more than one Commitment, Job/Project, Cost Code, Category or GL Account (General Ledger), the user may elect to split the Distribution into multiple distributions. Users have the option to calculate the value of one of the Distributions to adjust to the remaining value after all other distributions are added up. Negative Distributions are permitted when necessary (although not common). This feature can also be utilized for Equipment in the Remote Payroll module.

Document: hh2 Document Flow is primarily a Document Management system. Documents refer to the financial instruments that hh2 Document Flow currently manages: Invoices, Reimbursements, Credit Card Transactions, and Application for Payments. Sometimes, the term Image is also used during the Data Acceptance step for images that need to be recognized by the Optical Character Recognition (OCR) before becoming a Document. The standard hh2 Document format is a Searchable PDF (either native pdf, or from raster images that have been run through the OCR process built into hh2 Document Flow Data Entry).

Document Acceptance: This is the process of accepting invoices that were captured using one of the many methods available to hh2 Document Flow Customers. Invoices can be captured by email, document scanner, monitored network folder, API, manual web upload, scanned by app, and uploaded after "opened in" an app. In cases where large groups of invoices were scanned in batch, typically by a document scanner, hh2 has advanced options to delete blank pages or split a document into multiple invoices and can be configured to combine multiple documents into a single invoice. Images may be enhanced and OCR'ed into Searchable PDF format.

Document Class: Utilized in the hh2 HR module. Document Classes provide a means to categorize available document types, appearing on Employee Records and Job/Crew Dashboards. For instance, documents may be related to 401K benefits, job offers or even company newsletters. This feature allows for a quick search on types of documents.

Document Flow: The hh2 module that streamlines the invoice management process. Also referred to as the AP Module.

Document Flow Process for Invoices: The four-step process of Document Acceptance, Data Entry, Workflow, Final Review and Export of invoices in the hh2 Document Flow (AP) system.

Document Flow for Receipts: The five-step process of Capturing and Uploading the Receipt Image, Receipt Coding, Importing Credit Card transactions, Workflow routing and the Final Review and Export to the accounting system. This process is performed in the Document Flow (AP) module.

Document Flow Process for Reimbursements: The four-step process of Capturing and Uploading receipts for reimbursement, Coding the reimbursement, sending it through a Workflow and conducting a Final Review and Export to the accounting system. This process is performed in the Document Flow (AP) module.

EEO-1 Reporting: Referred to in the hh2 HR module. The EEO-1 (Equal Employment Opportunity-1) report is a mandatory survey for U.S. employers with 100 or more employees, collecting data on workforce composition by race, ethnicity, gender, and job category. It helps identify and address workplace discrimination and promotes diversity and inclusion.

Entity: This term is used in the Document Flow (AP) module. It refers to the Business Unit used by the ERP accounting system. Sometimes the business entity is part of a larger parent company or entity. Sometimes business entities are created specifically for a large single project. Data Entities are abstract concepts that identify the properties that make it unique. Examples of data entities include Job, Employee, Cost Codes and GL Accounts.

Equipment Revenue: Within the Remote Payroll module, construction companies can monitor the duration of equipment usage. Employee time is linked to specific pieces of equipment for revenue tracking purposes. The Equipment Revenue undergoes an Approval Path and is ultimately exported to the accounting system.

ERP: Enterprise resource planning (ERP) is a type of software system that helps organizations automate and manage core business processes for optimal performance. In this case, the ERP system refers to the construction accounting system, such as Sage 300, Construction and Real Estate, Sage Intacct, Viewpoint Vista, and QuickBooks.

Export: Refers to the process of moving data from the hh2 system to the construction accounting system or ERP.

Extra: Sage 300 Construction, Real Estate, and Sage accounting systems (ERPs) opted to use a separate entity for a child job called an Extra. It denotes a smaller portion of a parent job that can be managed like a normal job. Most other construction accounting systems (ERPs) have opted to use hierarchal jobs (parent jobs and child jobs or sub jobs) instead of Extras. An example of an Extra might be an auditorium or exhibit hall as part of a larger complex.

Field User: A construction company employee that uses hh2 software out in the field.

Field Work: Work that happens in the field, versus in the Shop or Office.

Finalize: In the context of Field Reports, this refers to the process of locking down a log, so no further edits are allowed. Logs not finalized within the period specified in the System Setting (FR>Settings>System Settings>General Settings tab>Auto-finalize logs) will be automatically finalized by the hh2 system. This will protect the legal integrity and credibility of the Daily Log. However, there is the ability to add an addendum. Unit Production/Activities data is synchronized to the Sage 300 accounting system, as well as Remote Payroll data from the Remote Payroll module at the time of finalization.

Final Review and Export: During this step, invoices or are reviewed and then exported to the accounting system. Mistakes can either be corrected and invoices (for Document Flow) or time (for Remote Payroll) are sent back to earlier stages in the Workflow for revision. If everything checks out, the Invoice (for Document Flow) or Labor Time Sheet (for Remote Payroll) is approved and then exported to the accounting system (ERP).

Foreman: This role varies based on the construction company's business model and needs. Typically, this person is responsible for managing a crew of construction workers. For larger jobs, with multiple crews, a Foreman usually reports to a Superintendent. Within the hh2 system, this job role may be set up as a part of the Workflow process. Foremen usually approve standard invoices, receipts, or reimbursements and time in the Document Flow (AP) and Remote Payroll modules. Further, allowed Formen may have access to certain employee records in the HR module.

Fringe: The employer paid portion of the employee's benefits, such as health care costs. This term is used in the HR and Pay Stubs modules.

General Ledger or G/L Account: A comprehensive record of all financial transactions and accounts for an organization, providing a snapshot of its financial health. Sometimes referred to as the G.L. For construction accounting systems, the Job Cost is an abstraction of the G.L. that makes it easier to record transactions related to specific cost codes on specific jobs. Overhead expenses are commonly coded directly to a G.L. Account or to an overhead Job that rolls up to the G.L. Examples of overhead expenses may include rent, insurance, taxes, and salaries of office staff.

Global Password: A separate password in addition to the Administrator's own log in password. It is utilized when organizations have multiple Administrators, and only certain Administrators should have access to the Security Group Setup. See Security Group. This provides a means to create security around Pay Stubs and employee records in the HR module.

Header: The portion of the invoice that uniquely identifies information for the entire invoice but is separate from the distribution (where costs are allocated to) data. Typical Header information includes, but is not limited to, items like Vendor, Invoice Date, and Due Dates. Data requirements for the Header are heavily based on individual construction accounting system requirements. This term is used in the Document Flow (AP) module.

Hh2 Admin: An hh2 employee that assists with set up of the construction company's hh2 site.

HIPPA Regulations: Referred to in the hh2 HR module. HIPAA (Health Insurance Portability and Accountability Act) regulations aim to protect employee privacy by establishing standards for the confidentiality and security of information, ensuring that sensitive details are safeguarded in the workplace. This term is used in the HR module.

Home Page: the initial landing page a user is brought into when signing into hh2.

Icon: a small graphical representation or symbol that represents an object, concept, action, or function. They are often designed to be easily recognizable and can represent anything from simple actions (like saving a file) to more complex concepts (like settings or navigation). For the purposes of this document, they may also be considered a button.

Identifier or Site Identifier: Refers to the company's unique hh2 URL site name. For example, if the construction company is ABC Construction, the identifier of "ABC," might be included in the URL. For example: "https://abc.hh2.com".

Image: This refers to any sort of raster image (like photos) or scanned invoices that have been uploaded to the hh2 system that have not yet been accepted into the AP-Document Flow module. Once these images have been run through the Document Acceptance process, they become Documents. Most of the time, these images become Invoice Documents, but can also become Credit Card Receipts or Reimbursements. Images may be uploaded in other hh2 modules such as Field Reports and HR.

Import: The process of moving data into the hh2 system from the construction accounting system or ERP. There are some places where data can be manually imported into hh2 like credit card transactions. Sometimes data can be imported by hh2 staff in excel format. For instance, a list of employees to set up as users.

Invoice: A bill a company receives from a vendor. Many vendors send invoices by email and are already in a native searchable pdf. For paper invoices that must be scanned, invoices may be received in an image format that must be run through hh2's OCR software in Data Entry before data can be automatically captured. This term is used to in the Document Flow (AP module).

Invoice Acquisition: Refers to how an invoice was acquired. Invoices can be acquired by email, document scanner, monitored network folder, API, manual web upload, scanned by app, and uploaded after "opened in" app. This term is used in the Document Flow (AP module).

iPaaS (Integration Platform as a Service): An hh2 product, depending on the software version, it may be seen as the OCM module on the Home Page. This links and syncs data between hh2 and certain 3rd party products such as Procore. hh2 Document Flow is bundled with hh2's Integration Platform as a Service or iPaaS. iPaaS is configured to automatically pull data from the construction accounting system (ERP) and reconcile it with the online copy within hh2. This ensures all accounting codes like Jobs, Costs codes, employees and others are always kept current within hh2. hh2's iPaaS also ensures that changes made in hh2 are synchronized automatically to the ERP. In some cases, hh2's iPaaS can also be configured to synchronize data from 3rd parties, such as Procore, directly to the ERP.

Job: A job is a contractual obligation to perform a specified scope of work for a customer. Also called a Project, a job can have multiple commitments (subcontracts and purchase orders) by vendors associated with it. hh2 Document Flow is set up to allow permissions to be configured by job and job role. Sometimes jobs can have child jobs or sub-jobs. In Sage 300 Construction and Real Estate, these sub-jobs are called Extras. In most other construction ERPs, they are simply child jobs of a larger parent jobs in a hierarchal relationship. Job and Project are used interchangeably by hh2. Time may be coded to Jobs in Remote Payroll.

Job Code/Number: A unique code assigned to a specific project or job within a construction company. This code is typically set up in sections to help make it easier to identify the job. It helps track and organize financial transactions, costs, and revenues associated with a particular project. Job Numbers are used to differentiate and manage various ongoing projects, allowing for accurate cost allocation, budgeting, and financial reporting. Job Codes can be alphanumeric and may include separator characters for each section. For example: "200-24" might be the 200th project the company has done, and it started in the year 2024.

Job Phase: Although some within the construction industry may refer to phases of construction, most of the time it refers to the work breakdown structure in Job Cost. Cost Codes and Phase Codes are used interchangeably. Some construction accounting systems use hierarchal cost codes or phase codes. Hh2 imports them as separate codes.

Level: In hh2, levels within the Workflow handle invoice review, approval, and passing from lower to higher levels, culminating in data export to the accounting system. Levels are more of a loose term as routing within a workflow can have decisions and branching logic that make levels more abstract.

Module: Refers to hh2's product offerings: AP-Document Flow for Invoices, Credit Cards, and Reimbursements; RP-Remote Payroll; HR-Human Resources; PS-Pay stubs; and FR-Field Reports.

OCR: Optical Character Recognition. It is a technology used to convert raster documents (any documents that use colored pixels to make a larger image), such as scanned paper documents, raster PDF files (pdf files that come from scanned images), or images taken by a digital camera, into hh2's native file format, searchable pdf. OCR technology enables computers to recognize and extract text from these raster images, turning them into machine-readable text that can be manipulated, searched, and analyzed. OCR is used to easily pre-fill header information on invoices.

Overhead Expenses: Expenses that are not coded directly to a job or project. These might include certain types of office workers or laborers assigned to maintain equipment, for instance. Many times, overhead expenses are coded directly to GL Accounts but sometimes companies choose to set up an overhead job to track overhead as it gives them advanced reporting available in the job cost system.

Page: The terms Page, Screen, Form or Window are used interchangeably in this document. All referring to the location of the visual display of information.

Parent: Some concepts in construction are hierarchal, meaning they are organized and structured with parents and children. For business entities, sometimes child companies are part of a larger parent company. For data entities, some abstract concepts fall as child entities of another larger entity, such as Extras or Sub jobs being a child of a larger Job, or Cost Codes being a child entity to the Job that tracks costs. See: Child.

Pay-app: Refers to a payment application or payment request. It is a formal document submitted by a contractor or subcontractor to request payment for work completed on a construction project. The pay app outlines the amount of work done, materials used or stored to date, and any other billable items, along with their associated costs. In hh2 this is currently in Beta.

Pay Identifier: This is the identifier for a type of pay within the accounting system.

Payroll Group: In the Remote Payroll module, a Payroll Group refers to a collection of employees who share similar payroll characteristics. For example, all salaried employees may be assigned to one Payroll Group, while another Payroll Group may include all hourly employees.

Pay Type: This is how hh2 distinguishes types of pay. For example, Regular Pay, Overtime Pay, Paid Time Off, Sick Pay and others. Pay Types can be set to display, or not, on hh2 Pay Stubs. This term is used in the Remote Payroll, HR, and Pay Stubs modules.

Picklist: Also known as a dropdown list, is a menu-like interface element often seen in forms and websites, offering users a set of predetermined choices to choose from, enhancing data entry efficiency and uniformity. In hh2, Picklists come in the form of Cards or dropdown lists.

Prevailing Wage Work: The government guarantees an assured wage for certain types of work (by certified class) on government Jobs. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Certified Work or Davis Bacon.

Project: A project is a contractual obligation to perform a specified scope of work for a customer. More commonly called a Job within hh2, a project can have multiple commitments (subcontracts and purchase orders) by vendors associated with it. hh2 Document Flow is set up to allow permissions to be configured by job and job role. In the Remote Payroll module, Payroll Groups may be assigned to Jobs. Sometimes jobs can have child jobs or sub-jobs. In Sage 300 Construction and Real Estate, these sub-jobs are called Extras. In most other construction ERPs, they are simply child jobs of a larger parent jobs in a hierarchal relationship.

Promote: In the context of Workflows, "Promote" refers to the capability to advance an approval from one level in the approval process to the next without requiring approval from the current level. This functionality is utilized when an approver is unavailable to approve time or receipts. Additionally, "Promote" signifies that the time or document is currently at a lower level than the logged-in user. This term is used in the Document Flow (AP) and Remote Payroll modules.

Punch Clock: In the Remote Payroll module, the Punch Clock feature enables employees to log their time by punching in and out, including coding. It is important to note that this feature should not be confused with the legacy Attendance Punch feature, which does not capture coding. Similar to labor and equipment, Punch Clock time follows an Approval Path and is eventually exported to the accounting system.

Push Notification: A push notification is a short message or alert sent to a user's device. These notifications "push" information to the user without requiring them to actively open them. They appear on the device's screen, usually accompanied by a sound.

Queue Digest: A queue digest, often referred to as a "queue summary" or "queue report," is a consolidated overview of activities or items in a queue. It provides a snapshot of the status, progress, and contents of the queue at a specific point in time. This summary can include information such as the number of items waiting, being processed, or completed, as well as any relevant details about those items. Queue digests are often used to help users or administrators quickly understand the state of a queue without having to review each item individually. Specific to hh2's Document Flow, a Queue is a summary of all invoices in the workflow requiring action from the user.

Receipts: Receipts are written or electronic documents that serve as proof of purchase. Purchases are typically made on the construction company's credit card, then uploaded into the hh2 system by snapping a picture. The AP Manager or Administrator then imports credit card transactions from the construction company's bank. Once this process occurs, the receipt is now converted to and considered an invoice in hh2. This term is used in the Document Flow (AP) module.

Reclaim: In the context of Workflow or Approval Path, "Reclaim" denotes the action of retrieving time or documents back to one's own level for approval. This feature allows users to bring items back to their stage in the approval process for further review or necessary adjustments. It also serves as an indicator to the individual in the highest level of the Workflow or Approval Path that either documents or time is ready for export. This term is used in the Document Flow (AP) and Remote Payroll modules.

Reimbursements: Unlike receipts, reimbursements are purchases made directly by the employee, either by cash or on their personal credit card. Receipts, on the other hand, are purchases made on a company credit card. Once uploaded and coded, reimbursements move through the Workflow as an invoice. Finally, they are exported to the accounting system. This term is used in the Document Flow (AP) module.

Roadblock: In the context of the time approval process, a "Roadblock" refers to an obstruction disrupting the normal flow of the approval process. Payroll Managers and Administrators can leverage the Roadblock feature to identify the specific level within the Approval Path where the obstruction is occurring. This feature aids in pinpointing issues and streamlining the resolution process.

Section/Tab: These terms are often used interchangeably. This is the portion of the Daily Log/Field Report that contains specific data related to the Section. For instance, the Weather Section (tab) stores information about the current logs weather conditions. This term is used in the Field Reports module.

Security Group: Security Groups: Utilized to in the hh2 HR and Pay Stub modules. Security Groups are utilized to categorize users, including HR Managers and other authorized individuals, into specific groups, dictating their access to employee records and pay stub information. The configuration of Security Groups is restricted to System Administrators.

Shop: An in-house workshop where employees of a construction company perform work such as welding for Jobs. This may also include fixing and maintaining company equipment. This is the opposite of Field Work, where work occurs on the job site.

Skills Matrix: In the HR module, the Skills Matrix allows the HR Administrator the ability to set up skills matrices that tie into the Evaluations tab on the Employee Record, Jobsite Dashboard, and the Crew Dashboard. Furthermore, Skills appear on Classifications and Locations reporting.

Synchronization (Sync): The process of syncing data between hh2 and the construction accounting system or ERP. This can be either importing or exporting data to and from hh2.

Standalone: If a construction company uses hh2 without an ERP, then they do not synchronize data to and from an ERP accounting system using hh2's built-in iPaaS. Some features and functionality will behave differently without this automated integration. Setup for the system will differ as well. Generally, this is not considered a best practice if the integration for the ERP in context already exists. However, construction companies that use non-construction accounting systems or rarely used construction ERPs may choose to use hh2 standalone.

Superintendent: Oversees the entire project in the field. These individuals typically report to a Project Manager and holds teams and foremen accountable for completion of work. In some smaller construction companies, the Superintendent acts as the Foreman and Project Manager.

System Administrator (Also referred to as Global Administrator): This is typically the IT person at the construction company. The System Administrator's role is to roll out the hh2 product at the construction company. They usually work with synchronization tools to ensure data is properly synchronized between hh2 and the company's accounting system and may be involved with the initial setup of user accounts and permissions.

Unit: A standardized quantity or measure used to quantify and price specific tasks, materials, or services within a project.

Unit Cost: The unit cost represents the expense of obtaining or creating a single unit of an item, including materials, labor, equipment, and overhead. This cost estimation method aids in calculating the total cost for a project component by multiplying the unit cost by the required quantity. For example, when building a concrete foundation, there may be a unit of "cubic yards of concrete." The unit cost would include the cost of materials (cement, aggregates), labor, equipment, and other expenses required to produce one cubic yard of a concrete foundation.

Unit Production: This term is referenced in the Field Reports module. In construction, Unit production involves quantifying work tasks using standardized units, such as square footage or linear feet. An example of unit production is tracking the square footage of drywall installation. This method allows for precise measurement, tracking, and management of construction activities. By breaking down tasks into measurable units, construction professionals can more accurately estimate costs, assess project progress, and allocate resources efficiently.

User: Anyone that logs into hh2. They must have a user account, with a username, password, first and last name and email address and ideally a cell phone number.

Username and Password: Within hh2 software, a user's username and password are considered global, and can be used across all the hh2 modules that have been purchased.

User Preferences: Customizable settings that allow individual users to tailor the software's functionality, appearance, and behavior to their specific needs.

User Roles: User Roles define specific permissions, access levels, and responsibilities assigned to different individuals within a system, ensuring proper data security and functionality based on their roles and responsibilities. In hh2 Document Flow, for example key roles include the 1) System Administrator 2) Administrator 3) AP Manager 4) AP Clerk 5) Office User and 6) Field User. The key differentiator between the Administrator and Manager is that the Administrator can create new users and grant permissions to users.

Vendor: For Invoices in hh2 Document Flow, a vendor refers to an Account Payable (AP) Vendor, which is a supplier for Purchase Orders or a Subcontractor for a Subcontract. All Commitments have an AP Vendor assigned to it. For Credit Card transactions, a Vendor refers to the business that the item was purchased from in the credit card transaction. For reimbursements, some companies choose to set employees up as Vendors so that approved reimbursements can be processed via AP check.

Workflow: A system designed to facilitate the routing and approval of time, invoices, and other documents down a predefined path with branching logic. Hh2's workflows are designed with Role Based Approval so that very few workflows need to be configured. Decision nodes in the workflow determine how time, invoices and other documents will be routed in the workflow. For example, invoices can be routed in one direction if certain criteria are met, or the opposite direction if it is not. For instance, one possible configuration is to route the invoice in one direction if it is coded to an overhead GL Account or another direction if the invoice was coded to a job. Another possible configuration is to route the invoice in one direction if the invoice is over a certain dollar amount or another direction if it is less. Labor time, on the other hand, may be routed to various levels of job roles for approval and rejection through an Approval Path. This term is used in the Document Flow (AP) and Remote Payroll modules.

Change Log

A Change log is a documented list of changes between one version of a document and the next version.

Between Version 1 and Version 2 of this document the following changes were made:

- Updated User Guide Notes on the Users that will Benefit from the Guide page.
- An updated Home Page section.
- An updated Glossary of Terms
- The addition of the Change Log.