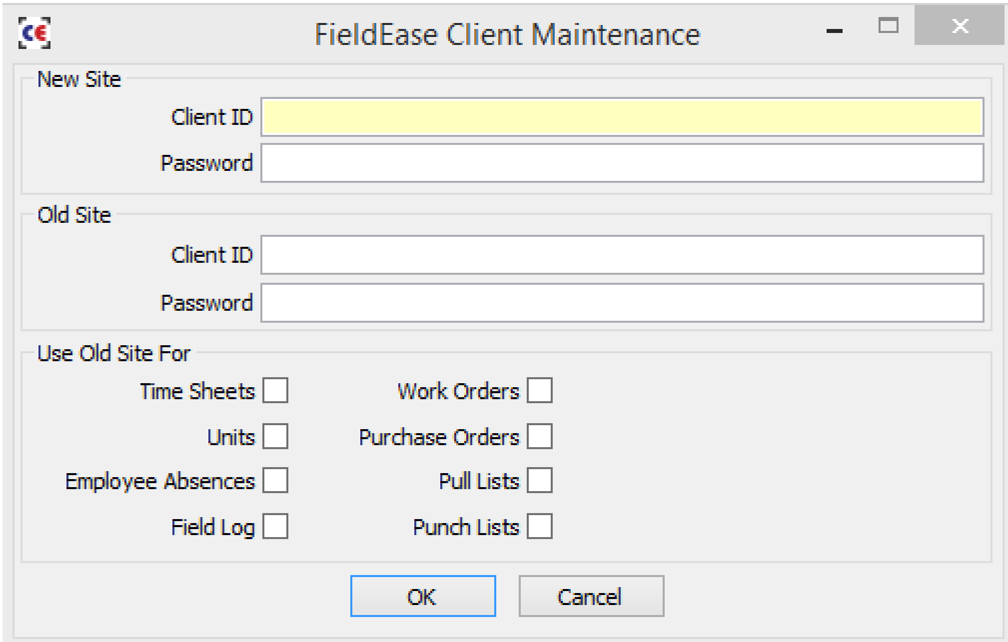
FieldEase 2.0 Setup

Web Client Maintenance:

The first step to begin using FieldEase 2.0 is to ensure that your FieldEase Client Maintenance Settings are correct.

From ComputerEase, select **FieldEase > FieldEase Client Maintenance**



If you are only using FieldEase 2.0, you will only need to enter data in the **New Site** section of the screen.

Client ID - Enter the Client ID assigned for your company

Password - Enter your password

If you are using some FieldEase 1.0 modules in addition to FieldEase 2.0, you will need to enter data in the **Old Site** section of the screen as well.

Client ID - Enter the Client ID assigned for your company

Password - Enter your password

Please note that the fields on the Web Client Maintenance screen are case sensitive.

You will also need to select the checkboxes for any modules that you are going to continue to use in FieldEase 1.0.

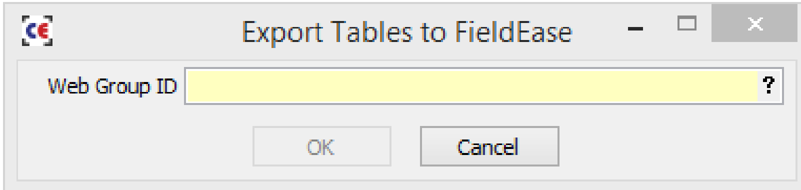
☐ Time Sheets	☐ Work Orders
☐ Units	☐ Purchase Orders
☐ Employee Absences	☐ Pull Lists
☐ Field Log	☐ Punch Lists

Click **OK** to save your settings.

Exporting tables to FieldEase:

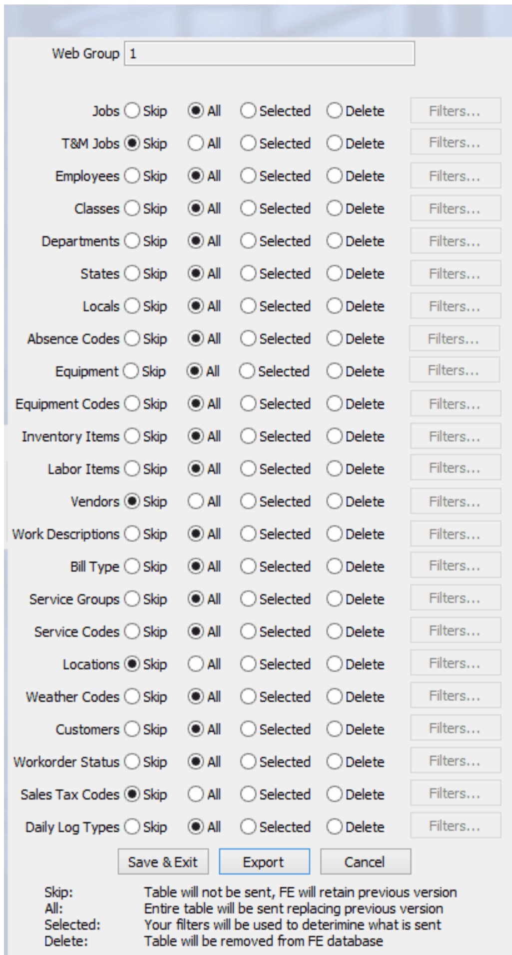
The next step in setting up FieldEase 2.0 is to export your tables to the web.

From ComputerEase, select **FieldEase > Export Tables to FieldEase**



Web Group ID - Enter or select the group to exported to the web

After you click **OK** the Export to Web screen will appear. Select the tables that you wish to export.



Skip - The table will not be sent, FieldEase will retain the previous version

All - Entire table will be sent replacing the previous version

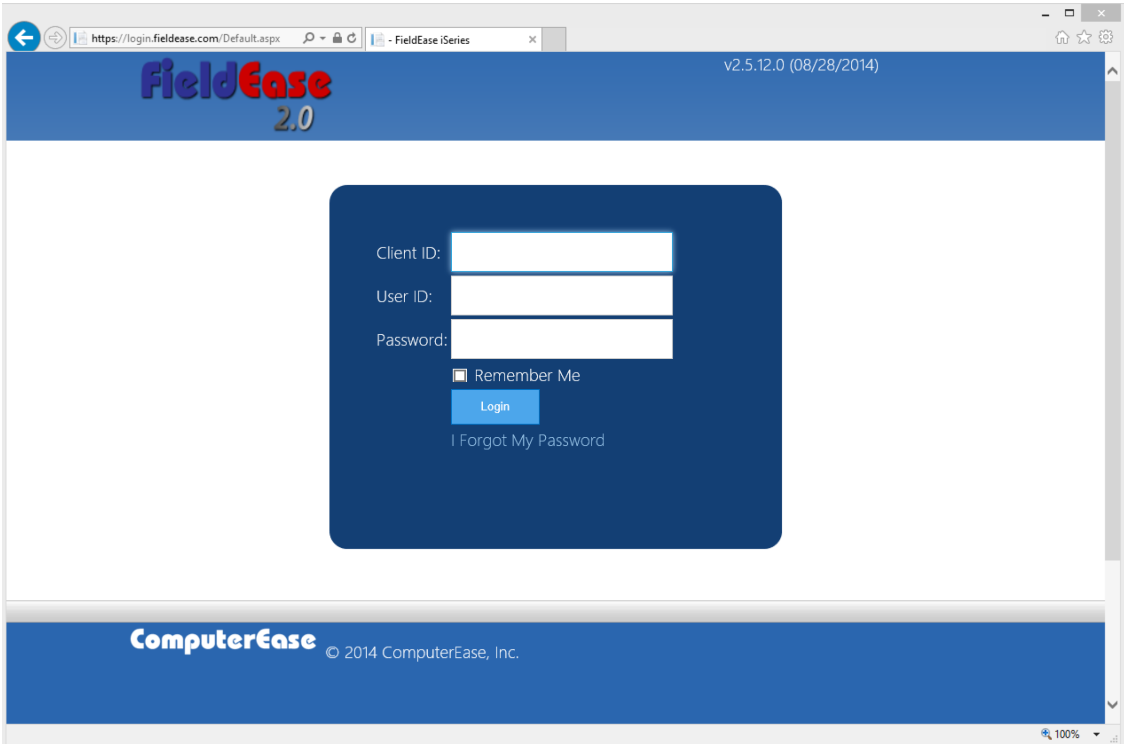
Selected - Your filters will be used to determine what is sent

Delete - Table will be removed from the FieldEase database

Once you have made your table selections, click **Export** to send the data to the web and wait for the confirmation message notifying you that export was successful.

Logging In:

To login to FieldEase 2.0, open a web browser and navigate to https://login.fieldease.com.



For your initial login, you will need to login as the Admin user assigned by ComputerEase. You will then be able to set up additional User IDs and assign them to employees.

Client ID - Enter the Client ID assigned for your company

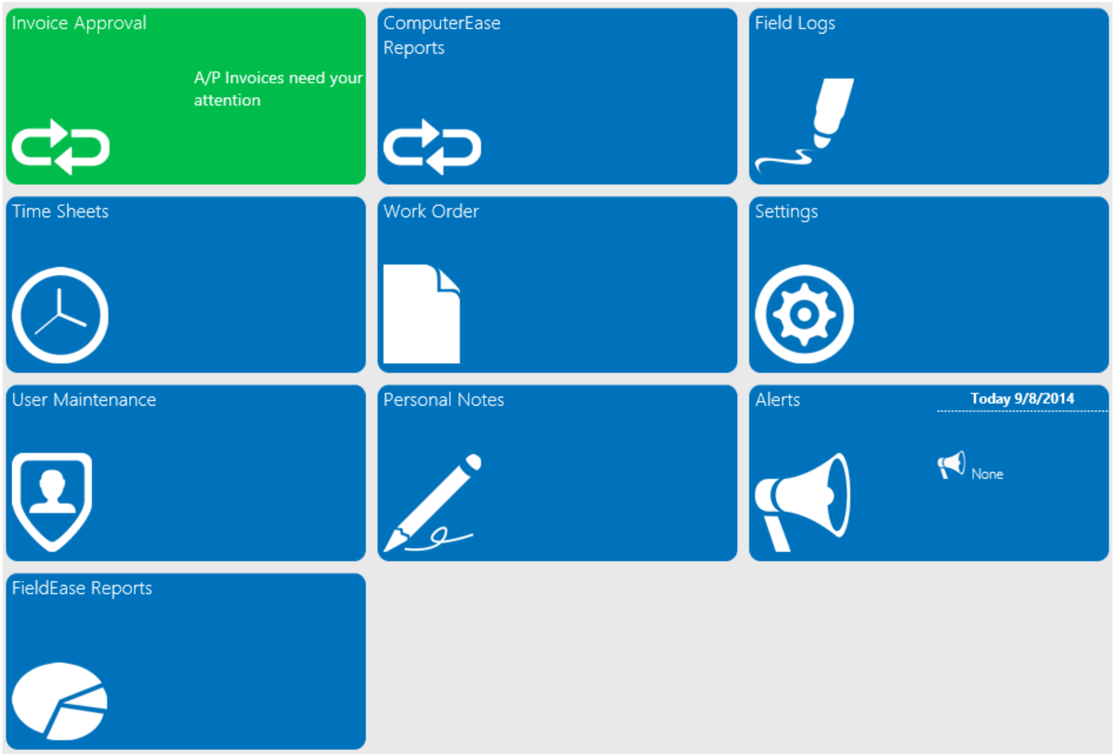
User ID - Enter your User ID (for the initial login, use the Admin user assigned by ComputerEase)

Password - Enter your password

Remember Me - Select if you would like FieldEase to remember your Client ID and User ID (Passwords will not be remembered)

Home Screen:

Once you login, you will arrive at the home screen. Here you will be able to access each of your modules (Time Sheets, Field Logs, Work Order), Settings, User Registration, Personal Notes, Alerts, Reports, and System Messages. If you are using the CE Live service, Invoice Approval and ComputerEase Reports will also be available.



User Maintenance:

The first step in setting up FieldEase 2.0 is to set up User IDs and permissions for employees that will need access to the system. Any users converted from FieldEase 1.0 will be listed under User Maintenance so you will just need to verify that their settings are correct.

From the home screen, click on **User Maintenance**.

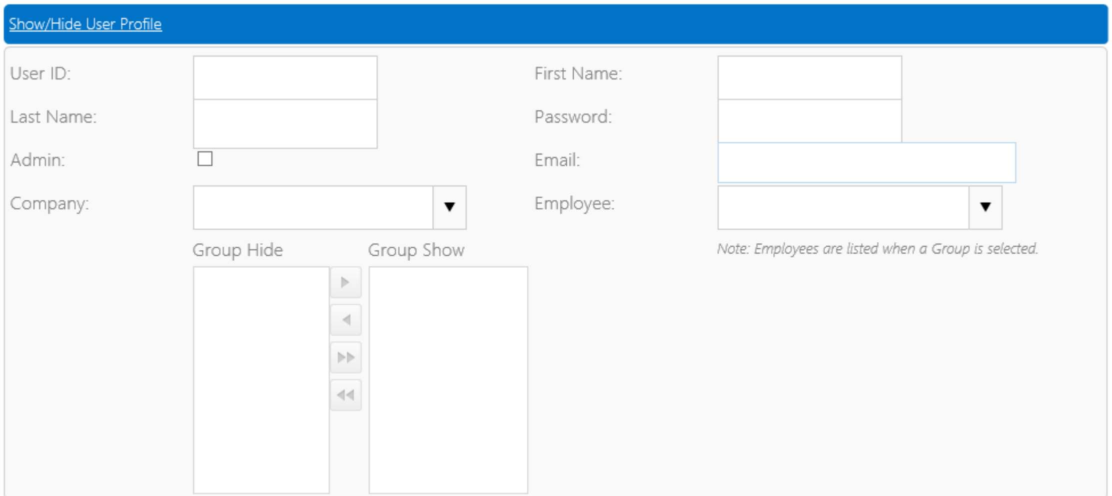
If this is your first time using FieldEase and you did not convert any users from FieldEase 1.0, you will only see the initial Admin user that has been set up for you.

Drag a column header and drop it here to group by that column

Active/Inactive	User ID	User Type	First Name	Last Name	Company ID	Employee ID
☑	Admin	Admin			178	

To add new users, click **Add New User** and start entering data in the area below the user list. To edit a converted user, double-click on the user in the grid to open for editing. There will be a section for entering the **User Profile** and then separate sections for assigning permissions for each of your modules.

The first step in setting up a new user is to enter data for the **User Profile**. In this section you will assign User IDs to employees and assign them to a Company and at least one Group.



User ID -Enter the user name that the employee will use to login to FieldEase.

First Name - Enter the employee's first name.

Last Name - Enter the employee's last name.

Password - Enter the password that the employee will use to login to FieldEase.

Admin - Select this option for admin users or leave unselected for non-admin users.

Email - Enter the employee's email address.

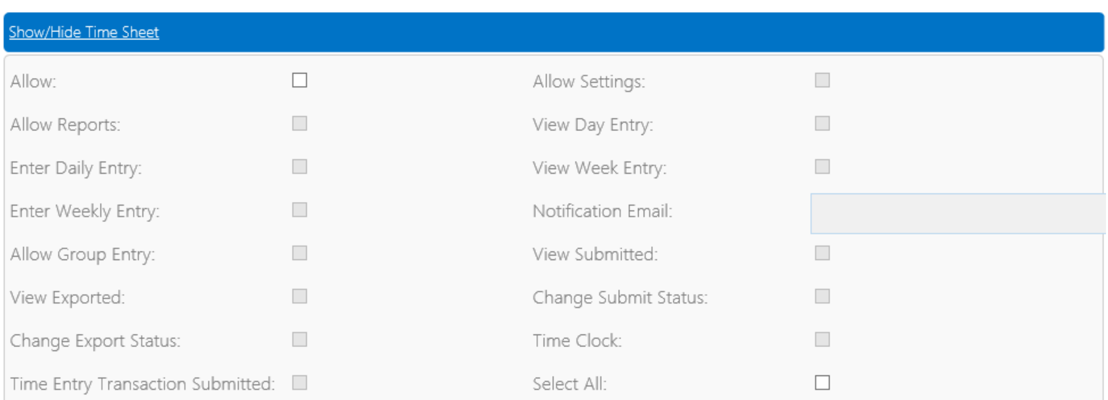
Company - Select the company that the employee works for.

Group Hide/Group Show - Select the group(s) that the employee is a member of and click the right arrow to move them to the right side.

Employee - Select the employee. Note that the employee list is populated when a group is selected.

The next step is to assign permissions to the employee for each module. There will be a permissions section for each module that you have purchased.

Time Sheet permissions:



Allow - Select to give the user access to the Time Sheet module.

Allow Settings - Select to give the user permission to edit Time Sheet settings.

Allow Reports - Select to give the user permission to run Time Sheet reports.

View Day Entry - Select to give the user permission to view Daily Time Sheets.

Enter Daily Entry - Select to give the user permission to enter Daily Time Sheets.

View Week Entry - Select to give the user permission to view Weekly Time Sheets.

Enter Weekly Entry - Select to give the user permission to enter Weekly Time Sheets.

Notification Email - If you plan to enable Auto Notification for Time Sheets, enter the email address for the user that is to receive email notifications when time sheets are submitted.

Allow Group Entry - Select to give the user permission to enter time sheets for other users in the group.

View Submitted - Select to give the user permission to view submitted time sheets.

View Exported - Select to give the user permission to view exported time sheets.

Change Submit Status - Select to give the user permission to submit time sheets. If **View Submit** is selected, this will also give the user permission to unsubmit timesheets.

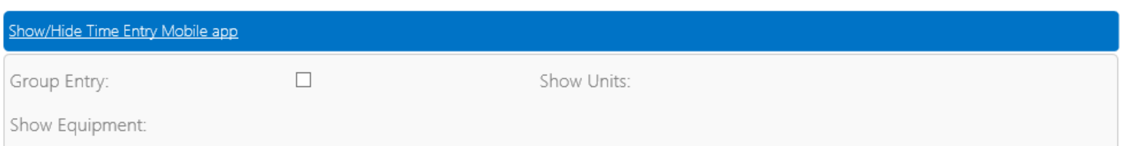
Change Export Status - Select to give the user permission to unexport time sheets. **View Exported** must also be selected.

Time Clock - Select to give the user permission to access the Time Clock.

Time Entry Transaction Submitted - This setting is for the Time Entry Mobile App. Select to have time sheets submitted using the mobile app appear in FieldEase as Submitted.

Select All - Select to select all Time Sheet options.

Time Entry Mobile App permissions:

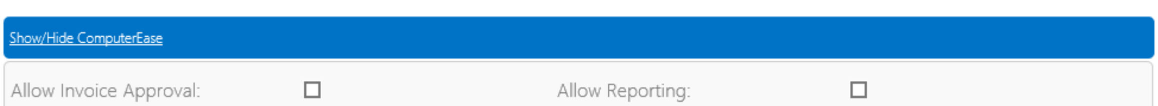


Group Entry - This checkbox is used to enable group entry for the Time Entry Mobile App and will only be active if you are only using the mobile app. If you are using Time Sheets in FieldEase, user settings for Time Sheets will carry over to the mobile app.

Employee Absence permissions:

Allow - Select to give the user access to Employee Absence.

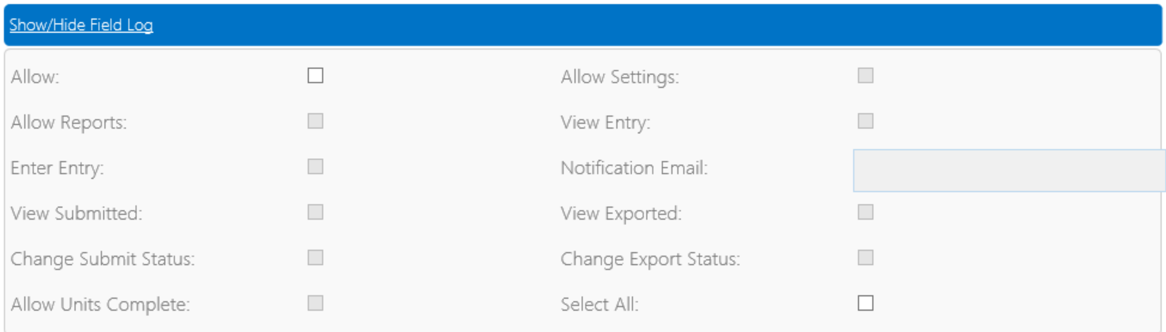
ComputerEase permissions:



Allow Invoice Approval - Select to give the user access to Invoice Approval.

Allow Reporting - Select to give the user access to ComputerEase Reports.

Field Log permissions:



Allow - Select to give the user permission to the Field Log module.

Allow Settings - Select to give the user permission to edit Field Log settings.

Allow Reports - Select to give the user permission to run Field Log reports.

View Entry - Select to give the user permission to view Field Logs.

Enter Entry - Select to give the user permission to enter Field Logs.

Notification Email - If you plan to enable Auto Notification for Field Logs, enter the email address for the user that is to receive email notifications when Field Logs are submitted.

View Submitted - Select to give the user permission to view submitted Field Logs.

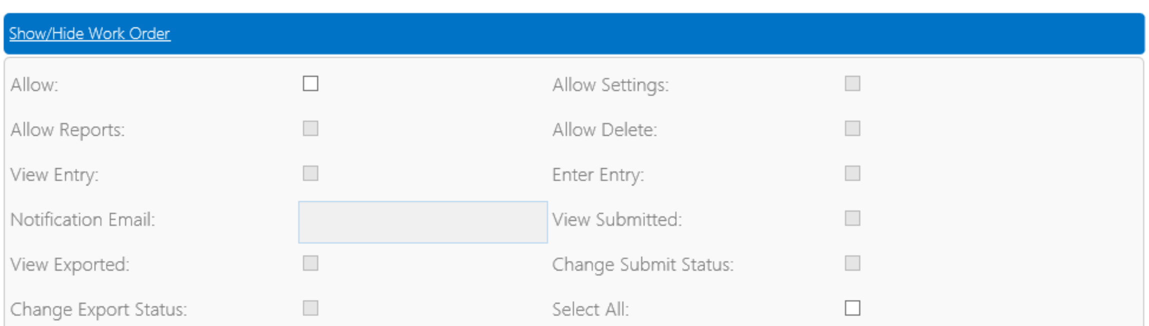
View Exported - Select to give the user permission to view exported Field Logs.

Change Submit Status - Select to give the user permission to submit Field Logs. If **View Submit** is selected, this will also give the user permission to unsubmit Field Logs.

Change Export Status - Select to give the user permission to unexport Field Logs. **View Exported** must also be selected.

Select All - Select to select all Field Log options.

Work Order permissions:



Allow - Select to give the user permission to the Work Order module.

Allow Settings - Select to give the user permission to edit Work Order settings.

Allow Reports - Select to give the user permission to run Work Order reports.

Allow Delete - Select to give the user permission to delete Work Orders.

View Entry - Select to give the user permission to view Work Orders.

Enter Entry - Select to give the user permission to update Work Orders.

Notification Email - If you plan to enable Auto Notification for Work Orders, enter the email address for the user that is to receive email notifications when Work Orders are submitted.

View Submitted - Select to give the user permission to view submitted Work Orders.

View Exported - Select to give the user permission to view exported Work Orders.

Change Submit Status - Select to give the user permission to submit Work Orders. If **View Submit** is selected, this will also give the user permission to unsubmit Work Orders.

Change Export Status - Select to give the user permission to unexport Work Orders. **View Exported** must also be selected.

Select All - Select to select all Work Order options.

Settings:

The next step is to ensure that the settings for each of your modules are correct. To access Settings, click on **Settings** on the home page.

Company Logo Settings:

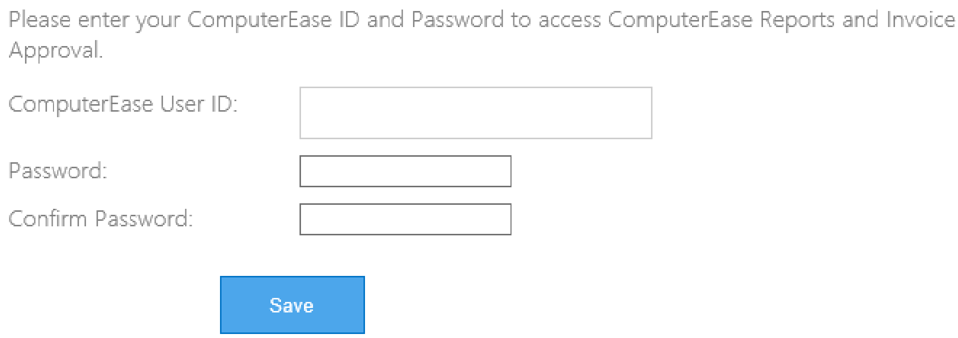
From the home page, click on **Settings** and then select the **Company Logo** tab on the left side of the page.

On this tab, the administrator has the option of uploading a company logo.

Click the **Select** button to browse to the location of your company logo. Select the logo and click **Open.** Once the logo uploads, click **Save.**

ComputerEase Settings:

From the home page, click on **Settings** and then select the **ComputerEase** tab on the left side of the page. These settings enable you to run ComputerEase Reports and access Invoice Approval using the CE Live service.



ComputerEase User ID - Enter your username that you use to log in to ComputerEase.

Password – Enter your ComputerEase Password.

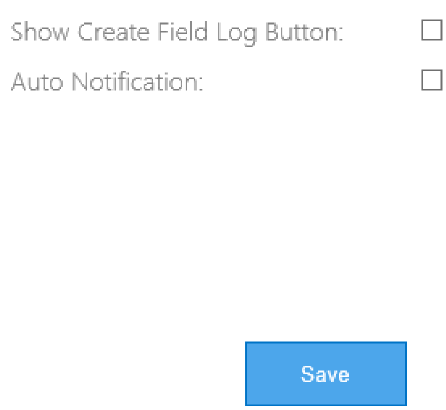
Confirm Password – Re-enter your ComputerEase password.

Employee Absence Settings:

There currently are not any Employee Absence settings.

Field Log Settings:

From the home page, click on **Settings** and then select the **Field Logs** tab on the left side of the page.



To enable adding Field Logs from the Time Sheets module, select the **Show Create Field Log Button** checkbox**.**

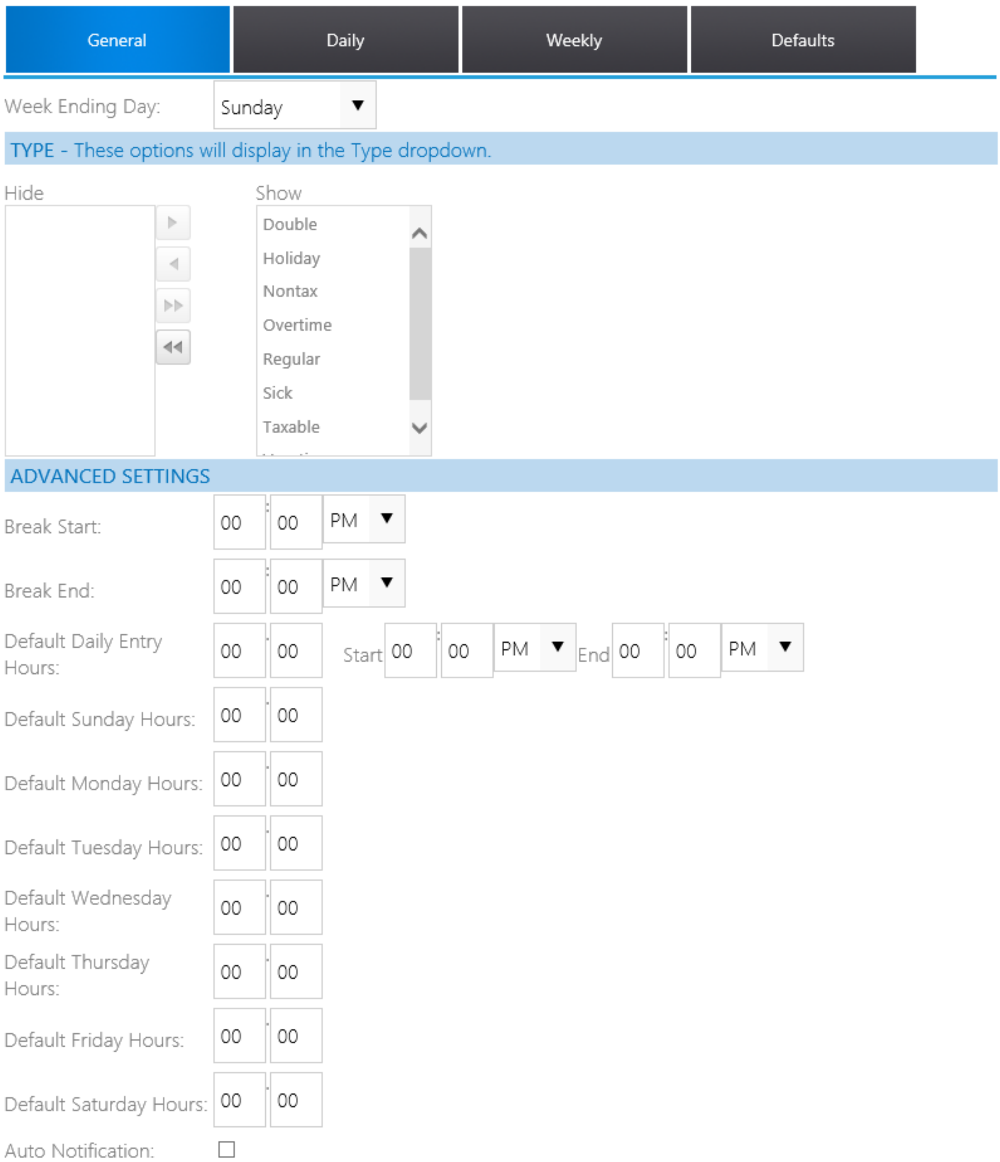
When this option is selected a **Create Field Log** button will be added to **Daily Time Sheets.** Leave this checkbox unselected if you do not want the **Create Field Log** button to be added to **Daily Time Sheets.**

To enable email notification, select the **Auto Notification** checkbox. When this option is selected, a notification email will be sent to the notification email address specified in User Registration when a Field Log is submitted.

Time Sheet Settings:

From the home page, click on **Settings** and then select the **Time Sheet** tab on the left side of the page.

On the **General** tab, you can set your week ending day, pay types, turn auto-notification on or off, and set break times and default hours.



Week Ending Day - Select the day that your payroll week ends on.

Type - Select the pay types that you want to be available for users to select from when they enter their time.

Advanced Settings are optional and should be left as 00.00 if they are not used.

Break Start - Enter the time that break begins.

Break End - Enter the time that break ends.

Default Daily Entry Hours - Enter the number of hours or the Start Time and End Time that the Employee Hours or Start Time and End Time fields will default to on Daily Time Sheets.

Default Sunday Hours - Enter the number of hours that Sun Employee Hours will default to on Weekly Time Sheets.

Default Monday Hours - Enter the number of hours that Mon Employee Hours will default to on Weekly Time Sheets.

Default Tuesday Hours - Enter the number of hours that Tue Employee Hours will default to on Weekly Time Sheets.

Default Wednesday Hours - Enter the number of hours that Wed Employee Hours will default to on Weekly Time Sheets.

Default Thursday Hours - Enter the number of hours that Thu Employee Hours will default to on Weekly Time Sheets.

Default Friday Hours - Enter the number of hours that Fri Employee Hours will default to on Weekly Time Sheets.

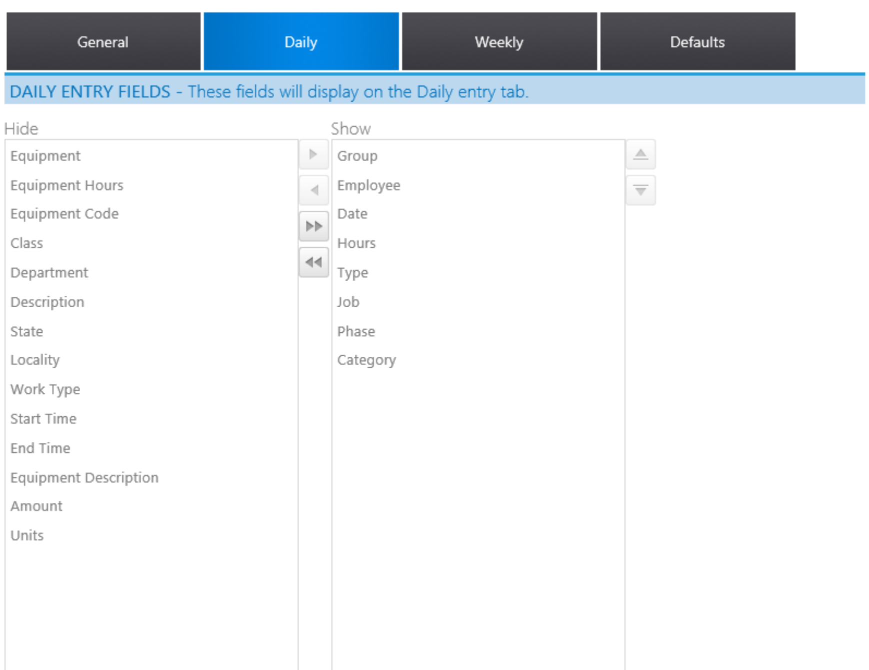
Default Saturday Hours - Enter the number of hours that Sat Employee Hours will default to on Weekly Time Sheets.

Auto Notification - Select to have an email sent when time sheets are submitted. This email will be sent to the address that was set as the Notification Email in User Registration.

Click **Save** to apply your settings. You may need to logout and log back in for your settings to take effect.

Daily Time Sheet Settings:

On the **Daily** tab you can determine which fields that you would like to display on the Daily Time Sheet for yourself.

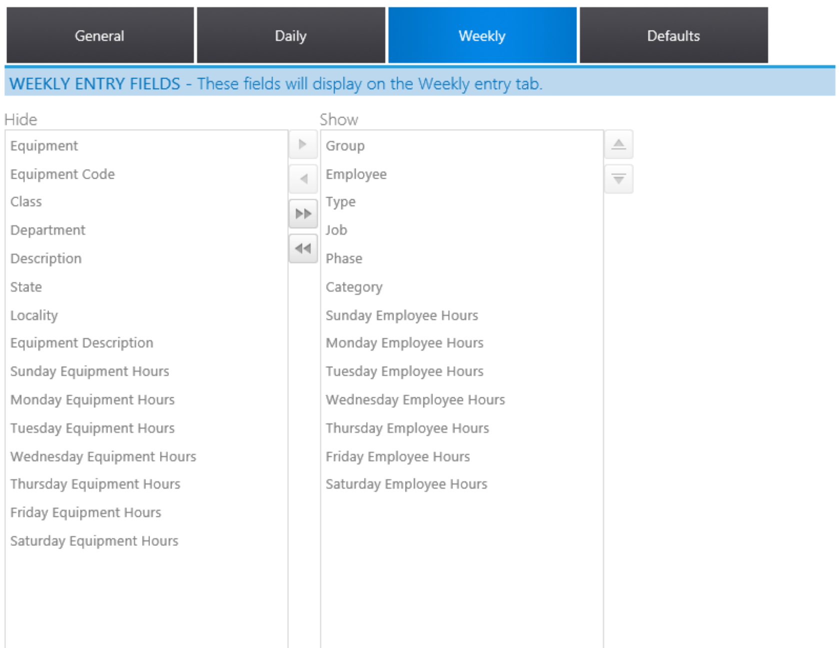


Daily Entry Fields - Move the fields to the right column that you would like to display on the Daily Time Sheet. The order that they are moved over is the order in which they will appear on the Daily Time Sheet. The arrows on the far right can be used to arrange the fields in the desired order. These fields will display when you login and will not affect settings for other users. Group, Employee, Date, Hours, Type, Job, Phase, and Category are the minimum fields required. All others are optional.

Click **Save** to apply your settings. You may need to logout and log back in for your settings to take effect.

Weekly Time Sheet Settings:

On the **Weekly** tab you can determine which fields that you would like to display on the Weekly Time Sheet for yourself.

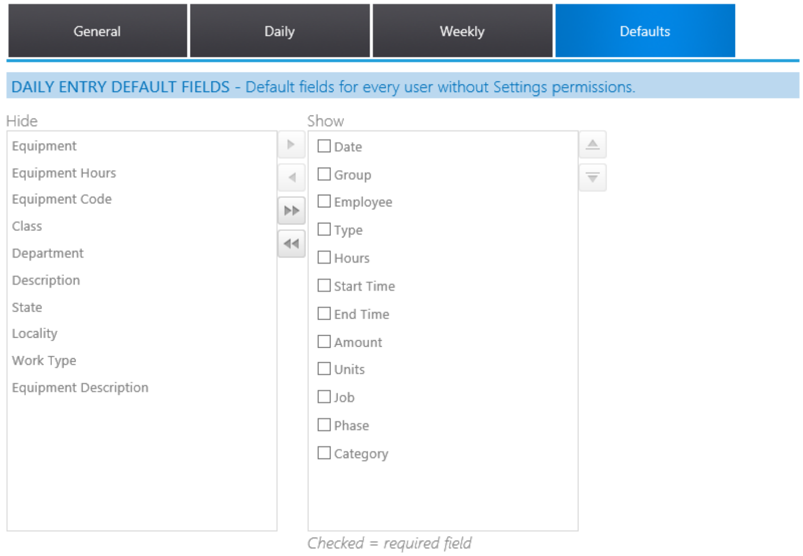


Weekly Entry Fields - Move the fields to the right column that you would like to display on the Weekly Time Sheet. The order that they are moved over is the order in which they will appear on the Weekly Time Sheet. The arrows on the far right can be used to arrange the fields in the desired order. These fields will display when you login and will not affect settings for other users. Group, Employee, Type, Job, Phase, and Category are the minimum fields required. All others are optional.

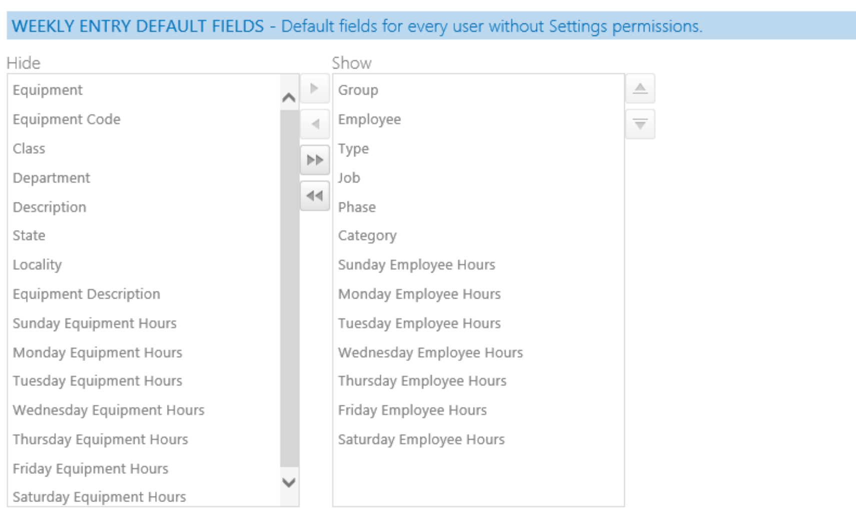
Click **Save** to apply your settings. You may need to logout and log back in for your settings to take effect.

Default Time Sheet Settings:

On the **Defaults** tab you can determine which fields that you would like to display on the Daily Time Sheet and Weekly Time Sheet for all other non-admin users that do not have access to Time Sheet Settings.



Daily Default Entry Fields - Move the fields to the right column that you would like to display on the Daily Time Sheet for all users. The order that they are moved over is the order in which they will appear for users on the Daily Time Sheet. The arrows on the far right can be used to arrange the fields in the desired order. Group, Employee, Date, Hours, Type, Job, Phase, and Category are the minimum fields required. All others are optional. Select the checkbox next to the field to require entry for that field.



Weekly Default Entry Fields - Move the fields to the right column that you would like to display on the Weekly Time Sheet for all users. The order that they are moved over is the order in which they will appear for users on the Weekly Time Sheet. The arrows on the far right can be used to arrange the fields in the desired order. Group, Employee, Type, Job, Phase, and Category are the minimum fields required. All others are optional.

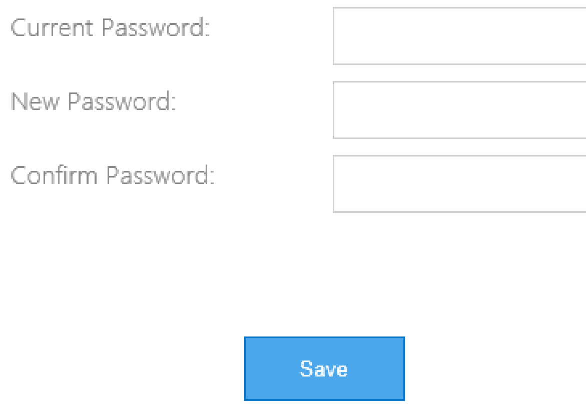
Click **Save** to apply your settings. You may need to logout and log back in for your settings to take effect.

Units Complete Settings:

There currently are not any Units Complete settings.

User Settings:

From the home page, click on **Settings** and then select the **User** tab on the left side of the page.



Current Password - Enter your current password.

New Password - Enter your new password.

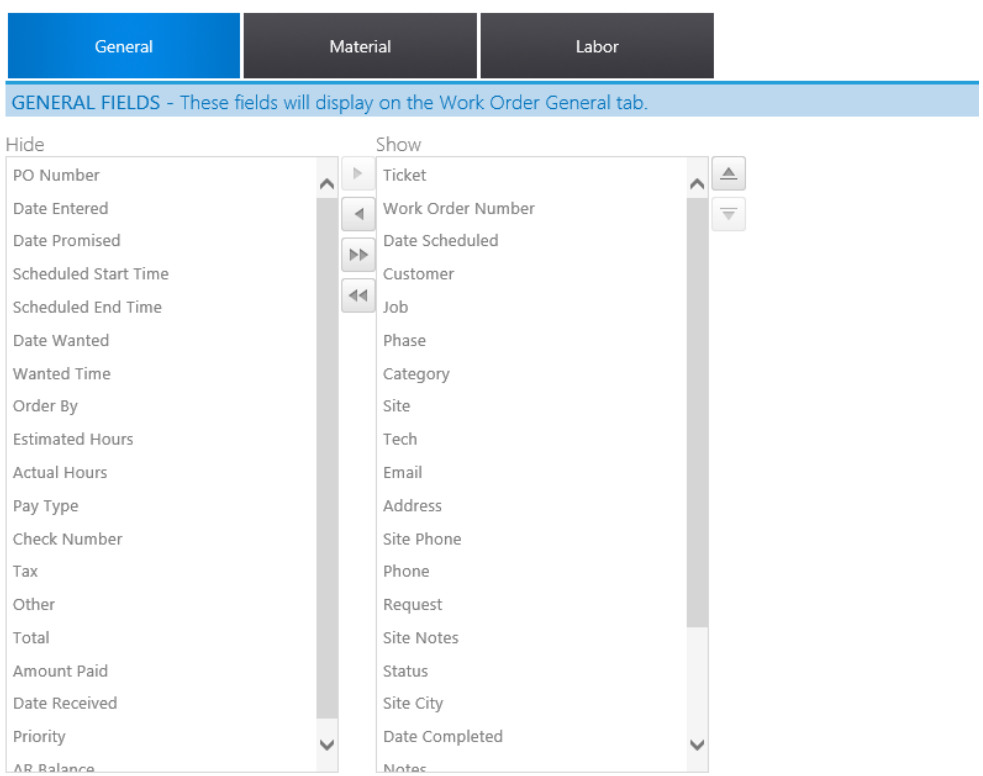
Confirm Password - Re-enter your new password.

Click **Save** to save your new password.

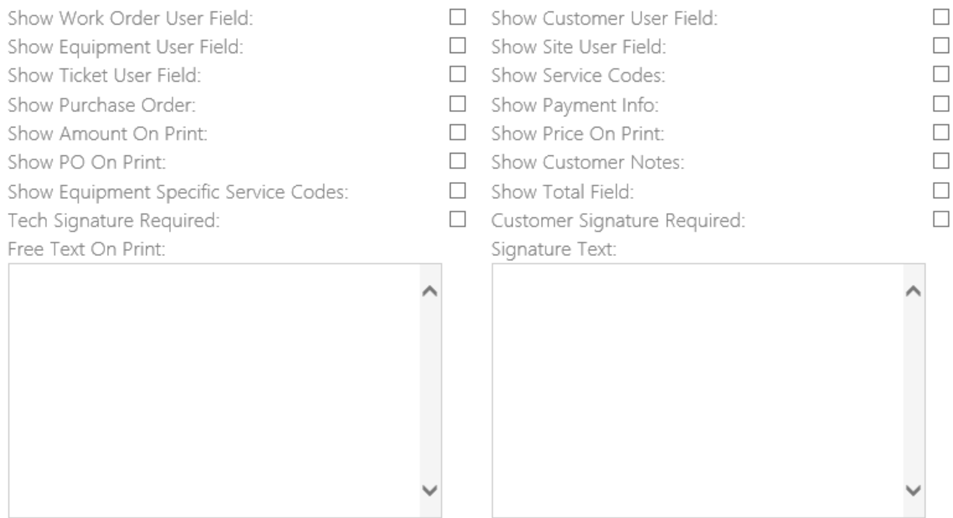
Work Order Settings:

From the home page, click on **Settings** and then select the **Work Order** tab on the left side of the page.

On the **General** tab, you can select which fields and tabs display on the work order.



General Fields - Move the fields to the right column that you would like to display on the Work Order General Tab.



Show Work Order User Field - Select to show the Work Order User Fields tab.

Show Customer User Field - Select to show the Customer User Fields tab.

Show Equipment User Field - Select to show the Equipment User Fields tab.

Show Site User Field - Select to show the Site User Fields tab.

Show Ticket User Field - Select to show the Ticket User Fields tab.

Show Service Codes - Select to show the Service Codes tab.

Show Purchase Order - Select to show the Purchase Orders tab.

Show Payment Info - Select to show payment information on the Final tab.

Show Amount on Print - Select to show amounts on the Work Order PDF.

Show Price on Print - Select to show prices on the Work Order PDF.

Show PO on Print - Select to show purchase orders on the Work Order PDF.

Show Customer Notes - Select to show customer notes.

Show Equipment Specific Service Codes - Select to show the Equipment Specific Service Codes tab.

Show Total Field - Select to show the total on the Final tab.

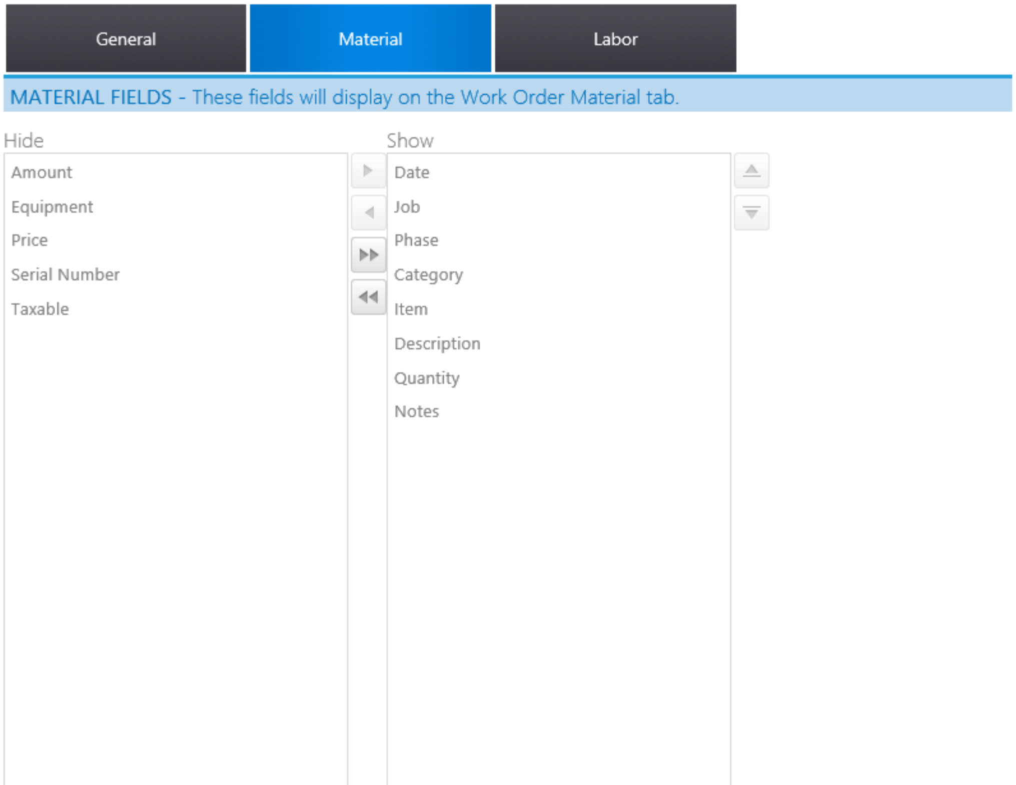
Tech Signature Required – Select to require a tech signature.

Customer Signature Required – Select to require a customer signature.

Free Text On Print - Enter the text to be printed on the Work Order PDF.

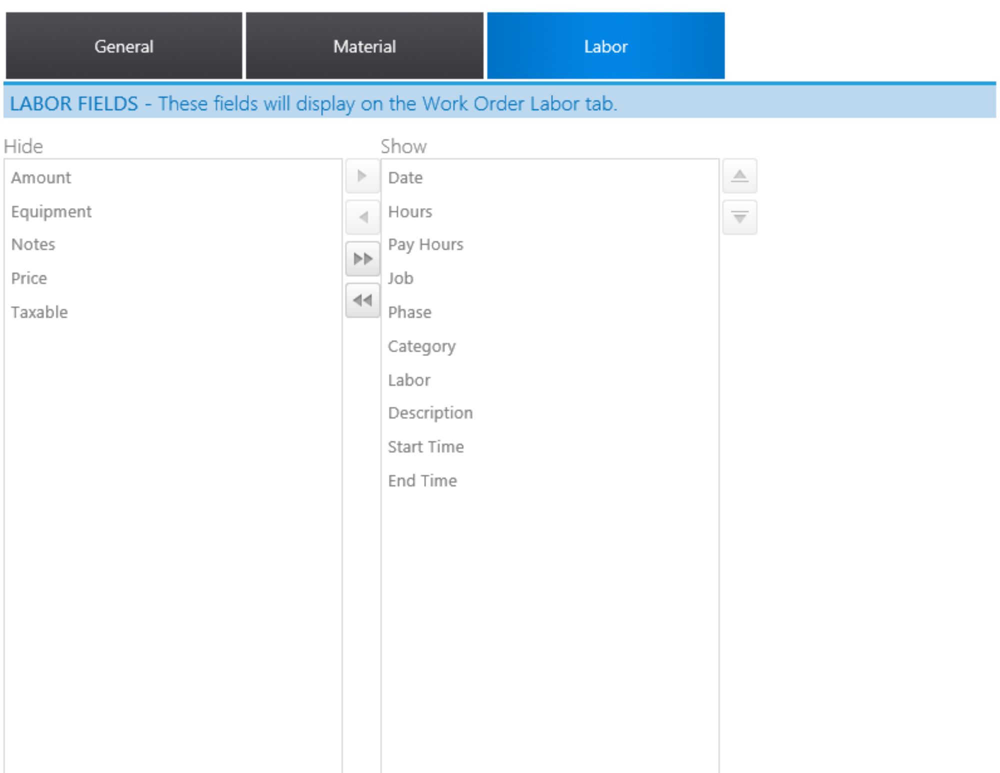
Signature Text - Enter the signature text to be printed on the Work Order PDF.

On the **Material** tab, you can select which fields display on the Material tab of the Work Order.



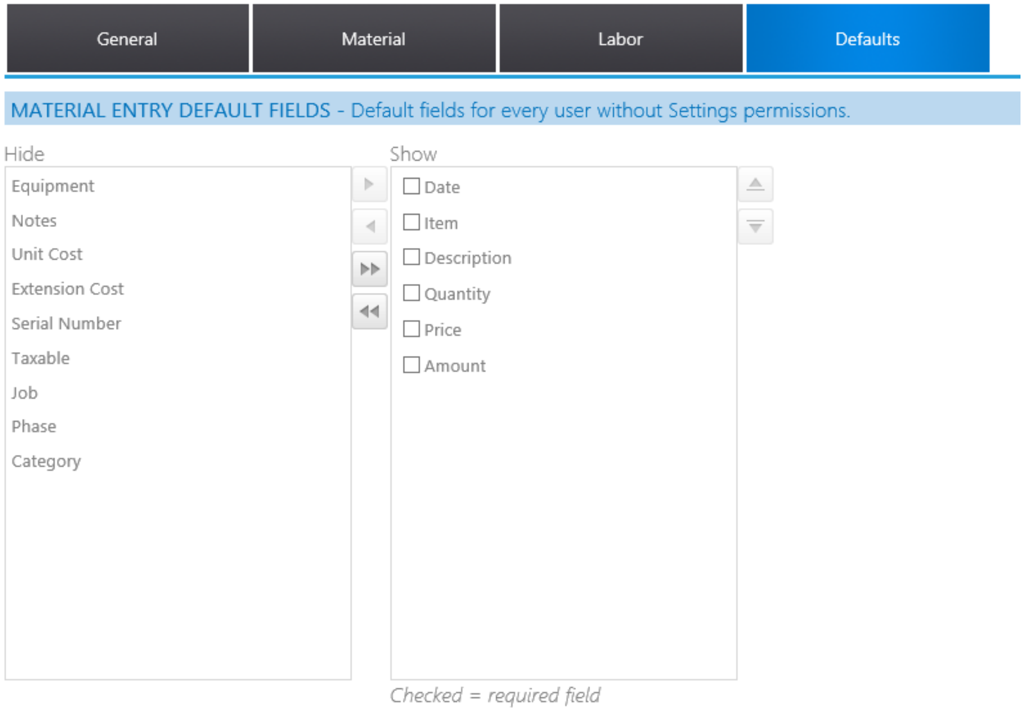
Material Fields - Move the fields to the right column that you would like to display on the Work Order Material Tab.

On the **Labor** tab, you can select which fields display on the Labor tab of the Work Order.

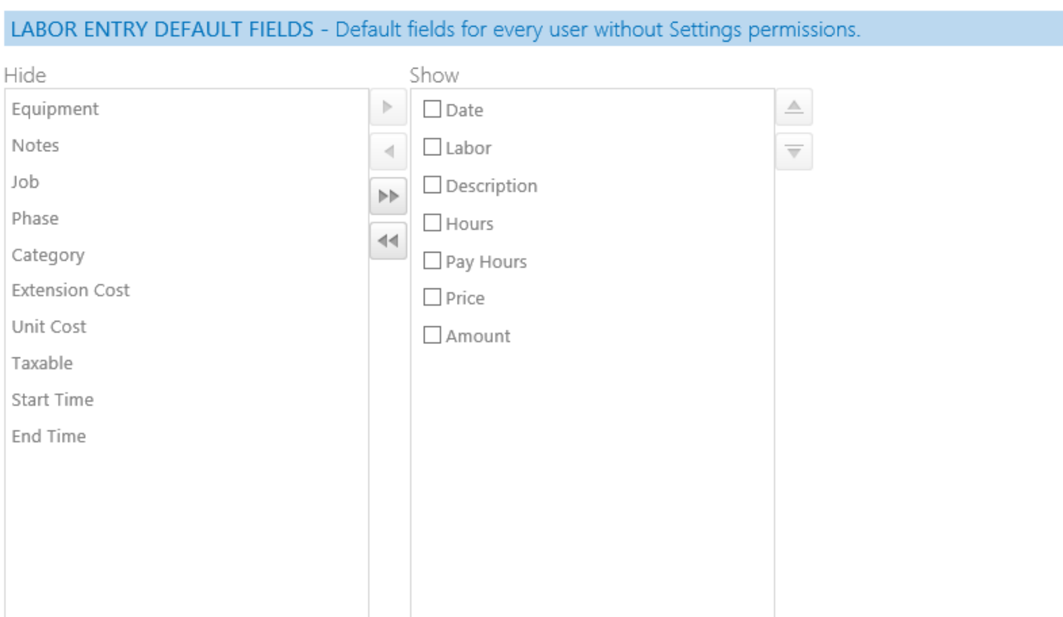


Labor Fields - Move the fields to the right column that you would like to display on the Work Order Labor Tab.

On the **Defaults** tab, you can select which fields display on the Material and Labor tabs for non-admin users who do not have permissions to Work Order Settings.



Material Entry Default Fields – Move the fields to the right column that you would like to display on the Work Order Material tab for all non-admin users who do not have permissions to Work Order Settings. Select the checkbox next to the field to require entry for that field.



Labor Entry Default Fields – Move the fields to the right column that you would like to display on the Work Order Labor tab for all non-admin users who do not have access to Work Order Settings. Select the checkbox next to the field to require entry for that field.

Click **Save** to apply your settings. You may need to logout and log back in for your settings to take effect.