Enhancements in Spectrum 14.25

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A Note About the Service Pack

The next service pack (14.25) is a bit different from other service packs we have issued in version 14.

The largest part of the service pack contains updated business logic and other "under the hood" enhancements. For the most part, most will not see any changes in Spectrum, but these upgrades will keep your Spectrum system running smoothly into the future.

What is an eligible system?

You must answer **YES** to the following questions to be eligible for upgrade to 14.25.

> To be eligible to upgrade, your Spectrum system must:
>
> 1. Meet or exceed the current Systems Requirements Guide.
> 2. Your system does **NOT** have any Custom Programming.

System Requirements

Companies cannot upgrade if their system does not meet the current System Requirements Guide.

- Your server must be running Windows Server 2012 R2 or Server 2016.
- Spectrum no longer supports SQL Server 2008. SQL Server must be upgraded to 2012, 2014 or 2016 before you can upgrade.

Check out the requirements here [INSERT LINK the following link].
https://online.dexterchaney.com/Download.aspx?id=3f6b6cc5-692c-4e76-9ff1-25f1a245461f

Custom Programming

Those with custom programming will first have their code reviewed by Technical Services (formerly known as Special Projects). They will make any changes to the software so that it functions properly. Once they have completed their review, you will be notified when you can upgrade.

Frequently Asked Questions

What happens if I can't upgrade my server before year-end?

We are planning to release a special year-end patch for those still on Spectrum 14.24.

Why do I have to upgrade SQL and the operating system?

Spectrum 14.25 contains enhancements to keep your Spectrum system running on today's software. This means that older versions of SQL and Windows Server just can't keep up with today's current requirements.

What happens if my custom programming isn't ready by year-end?

We have you covered! As it is feasible that there will be some clients who are waiting for their custom programming to be updated, we are planning to release a special year-end patch for those still on 14.24.

How do I know if I have Custom Programming?

Typically, these items will appear in a Custom folder on the Site Map.

I do not see the 14.25 Service Pack on Spectrum Online. What is up?

All clients who cannot answer YES to the above questions will be prevented from downloading the 14.25 service pack until the issues can be resolved.

BI Spectrum Business Intelligence Tutorial

This course was designed to help Spectrum Users understand and utilize the power of Spectrum BI (Business Intelligence), the enhanced, interactive reporting feature available to many Spectrum users.

Specifically, this course covers:

- Introduction to Spectrum BI
- Standard Reports
- Analysis Reports
- Interactive Reports
- Spectrum BI Dashboard and Administration

Who Is This For?

Any Spectrum user that wants to learn how to use Business Intelligence, including:

- Controllers
- Report Writers
- Anyone who wants to extract data out of Spectrum

> ⚠️ **Power User Tip**
>
> *The Spectrum Business Intelligence module is **not required** to do the tutorial.*

How to Access the Tutorial

Here are the steps:

1. Log onto Spectrum Online (https://online.dexterchaney.com)
2. From the main welcome page, click the 'Training Center' link and then follow the link for 'Online Training Videos'.
3. Click the link titled 'View Introduction to Spectrum BI' to launch the tutorial.

BI Equipment User-Defined Field Available on Equipment Control Cubes

SUGGESTION BOX ENHANCEMENT

Equipment User-Defined Fields (UDF's) will appear in Business Intelligence when **both** of the following are met:

1. The User-Defined Field is setup as 'Non-company specific' which means 'Company ALL'.
2. It is set to an 'Active' status.

All three types of data are supported with UDF's (numbers, dates and alphanumeric fields). The value of UDF is treated like a property and not a measure. This means that UDF values cannot be used in other measures. A blank UDF will appear as an asterisk '*'.

The description of the UDF will appear in the data cube. There are a few exceptions where the following characters will be stripped out of the UDF label. Those characters are:

Symbol	Description
&	Ampersand
"	Double Quote
< >	Greater Than or Less Than
[ ]	Brackets
\	Back Slash

For example, when a UDF has the label of 'Jack & Jill', it will appear in the cube as 'Jack Jill'.

Date UDF's will appear with three levels:

1. Year (YYYY format)
2. Month (Full name of the month)
3. Title of UDF (Will contain the full date in MM/DD/YY format)

Training Note: Keep in mind that this may cause confusion as one cube may have multiple dates.

BI Location and GPS Added to Equipment Cubes
SUGGESTION BOX ENHANCEMENT

'Location' has been added as a hierarchy and will display as 'Location Code (Location Description)'. The GPS latitude and longitude are available as properties and can be used on geo maps.

The piece of equipment's location is defined in Spectrum as its 'Current location.' When this field is blank, the asset's 'Home yard' location will be used.

The equipment location can be managed using Equipment Tracking as well as manually changing it on the Equipment Main Properties page.

Latitude and longitude data comes from the Yard, Job or Site. When no GPS data has been entered in Spectrum, these fields will display zeros.

BI Additional Information Added to Equipment Listing Data Source
SUGGESTION BOX ENHANCEMENT

The following fields have been added to the Equipment Listing Data Source used on Interactive Reports:

Equipment

- Location
- Serial Number / VIN
- Last Job
- Purchased From
- Yard
- Equipment Status Code
- Equipment Status Description

- Equipment Status Type
- Fuel code

BI Job User-Defined Field Available on PJ Cubes
SUGGESTION BOX ENHANCEMENT

Job User-Defined Fields (UDF's) will appear in Business Intelligence when **both** of the following are met:

1. The User-Defined Field is setup as 'Non-company specific' which means 'Company ALL'.
2. It is set to an 'Active' status.

All three types of data are supported with UDF's (numbers, dates and alphanumeric fields). The value of UDF is treated like a property and not a measure. This means that UDF values cannot be used in other measures. A blank UDF will appear as an asterisk '*'.

BI Open Commitments and Open Commitments To Date Added to Cost Details Cube
SUGGESTION BOX ENHANCEMENT

The Cost Details cube now contains two new measures: Open Commitments and Open Commitments To Date.

Add the Transaction Type to view the open commitments by AP (Subcontracts), IC (Job Requisitions) and by PO (Purchase Orders).

BI New Properties Added to Project Management Cube
SUGGESTION BOX ENHANCEMENT

Based on customer feedback, the following have been added as properties to the 'Job Code':

Contract #: The 'Contract #' field is found on the Job Main Properties page.

Price Type: Found on the Job Main Properties page, 'Price Type' includes:

- Fixed price
- Time + Material
- Cost-plus
- Unit price

BI Salesperson Added to Service Cube
SUGGESTION BOX ENHANCEMENT

Clients have requested that the 'Salesperson' be added as a level under the 'Customer'. This allows the report to be selected and sorted by salesperson. Instead of the code, the person's name is displayed.

BI Site User-Defined Field Available in the Service Cube

Work Order Site User-Defined Fields (UDF's) will appear in Business Intelligence when **both** of the following are met:

1. The User-Defined Field is setup as 'Non-company specific' which means 'Company ALL'.
2. It is set to an 'Active' status.

All three types of data are supported with UDF's (numbers, dates and alphanumeric fields). The value of UDF is treated like a property and not a measure. This means that UDF values cannot be used in other measures. A blank UDF will appear as an asterisk '*'.

BI New Standard Reports

The following standard reports have been added since the 14.24 service pack.

Meter Reading History

BUSINESS INTELLIGENCE | STANDARD REPORTS | EQUIPMENT | METER READING HISTORY

This interactive report demonstrates how to use the Equipment data source to create the history of meter readings for heavy equipment.

Click the ⊞ icon to toggle the prompts.

Only companies that the user has security for will be available.

Payroll Hours Analysis

BUSINESS INTELLIGENCE | STANDARD REPORTS | PROJECT MANAGEMENT | PAYROLL HOURS ANALYSIS

This interactive report demonstrates how to use Job Cost Transaction data source.

Click the ⊞ icon to toggle the prompts.

Only companies that the user has security for will be available.

JC TEAM Integration with Spectrum

The Import Team Projects screen was added for users who use the Viewpoint Team application.

When a project is created in Team, project data from Team will display in this screen and can be linked to a job in Spectrum for further use.

For more information about Spectrum-to-Team integration, go to https://teamdocs.viewpoint.com/topics/admin/c_about_spectrum_integration.html

PTE - Payroll Time Entry

Payroll Time Entry has been updated to version 3.5. The mobile application includes the following enhancements:

- **New Employee and Kiosk modes:** Employees can sign off on their daily or weekly hours via an app on their own phone, and kiosk mode allows multiple employees to utilize the same device.
- **Signature Capture**: Added Signature support to collect signatures of employees and instantly save to the cloud and archive for future use.
- **Dispute Workflow**: Ability to Dispute Hours and enter grievances either by typing a note, or by using the voice-to-text on your phone or mobile device.
- **Updated Infrastructure**: Under the hood enhancements.

The web application includes the following enhancements:

- **Approval Workflow:** Added Timecard Approval screen to show signatures and disputes. On this screen the job foreman can search and display list of employees by pay period, job or combination, view captured signatures and review disputed time card lines, and identify approved (signed) versus unsigned hours.
- **PIN Enabled**: Added Employee PIN for Employee and Kiosk mode.

PO Accrue Job Based PO's
THIS FEATURE IS IN BETA FOR 14.25

There are situations where it is important to accrue the costs of materials that have been received on a purchase order, but not yet invoiced. This functionality is available with the two-step method of receiving. Here, Spectrum uses the two-step method of receiving to track materials received and the processing of the eventual invoice. The received state (Step one) is performed in Packing List Entry. The invoiced state (Step two) is performed in Vendor Invoice Entry.

Overview of the two-step receiving process:

Step 1: Materials are received and recorded in Packing List Entry.

YES Accrual: The costs of the material are accrued to the job when the Packing List Update is performed.
NO Accrual: The costs are not charged to the job until step two. Select Job Cost reports can be run to include these received quantities.

Step 2: Invoice is matched up against the packing lists.

YES Accrual: The material cost is 'trued up' on the job during the A/P Transaction Register / Update step.
NO Accrual: The material cost is charged to the job and to the G/L.

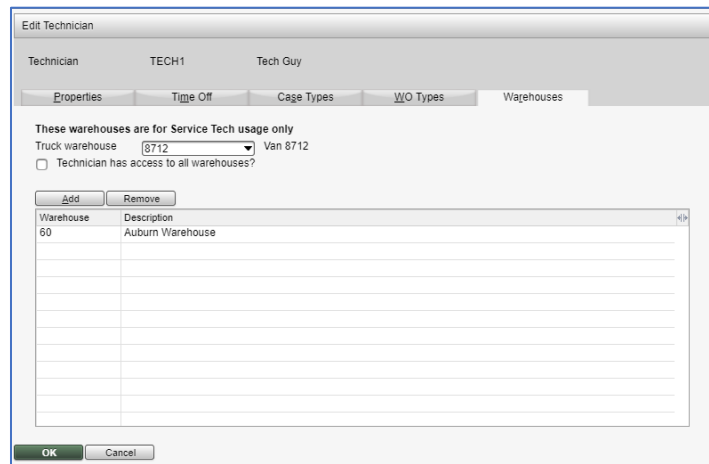## ST Non-direct Payroll Departments
FOR FUTURE DEVELOPMENT

The Field Tech/Service Tech Installation screen allows the Administrator to add non-direct Payroll Departments to Service Tech. This feature has no current functionality, but will be used in future development as we work to support the tech entering non-work order time into Service Tech.

WO Assign Warehouses to Technicians for Service Tech

In Service Tech, one warehouse could be assigned to the technician, but they had the option of selecting any warehouse. For larger operations with one warehouse per tech, this made the list of warehouses difficult to navigate and easy to select the wrong one.

Technician File Maintenance now allows for specific warehouses to be available to the technician. Below is an example of the technician having access to their truck warehouse, plus the Auburn warehouse to get additional parts. Service Tech will only display these two warehouses, making it easier to use.

SYSTEM Time Out Settings

Spectrum allows users to be automatically logged out after a period of time. The system has been changed to allow setting timeframes from 10 minutes to 4 hours (240 minutes).