Getting Started with the JOURNEYMAN Edition App

Overview

The "App" is easy to use. You can jump straight in and learn as you go. But spending a bit of time up-front can help get you up and running more quickly and effectively.

First, make a mental note – you can always get back to this document by selecting the "Master Settings" item at the bottom of the main menu, then tapping the "View Getting Started guide" link in the "About" section of that page. You can also download this document from the support section of our web site: www.constructioncentrics.com. And, there will be a copy of it in your iTunes File Sharing Documents repository that you can access from your PC or Mac.

Note too there's a link on the main "Master Settings" page that you can use to send an e-Mail to support@constructioncentrics.com for assistance using the App or to report any problems you might encounter.

Construction Superintendent – JOURNEYMAN Edition is a self-contained application. You don't need to be continuously connected to a data network to use it. The application stores all your project-related information on your iPad. All the information for the forms and reports you create are saved on your iPad. Your forms are submitted and distributed as PDF documents via e-Mail when you do connect to a Wi-Fi or Cellular Data network.

Before You Get Started

The App makes use of some of your iPad's native repositories and functions:

- You'll need to have your e-Mail account set up and working on your iPad in order to submit forms to their various designated recipients.

- You'll want to allow the App to access your Photos and Camera so you can include pictures in your submitted forms when useful.

- You'll want to allow the App to access you Contacts repository to make it easier to add known people and e-Mail address to the App's resource lists.

The first time you attempt to access these resources, the App will ask you for permission. If you change your mind later (one way or the other) go to Privacy page

in your iPad's Settings menu. Tap the resource(s) for which you want to control access – Contacts, Photos, Camera – then set the switch in the Journeyman cell appropriately.

Basic Application Constructs

The application deals with three simple concepts: Projects, Resources and Forms.

Projects are just what you'd expect – they are the construction jobs that you're tracking and managing. The App allows you to set up any number of Projects and easily switch among them when logging information and submitting Forms.

Resources are the people, equipment and materials involved in performing the Project work. These include: your employee Personnel, Suppliers, Contract Labor, Equipment and Materials. The App lets you build and maintain lists of these resources so you don't have to type them in each time you reference them in the Forms.

Forms are ultimately what you're using the App to create and distribute – getting your paperwork submitted more accurately and quickly. Currently, the App helps you with the following forms and reports:

- Daily Logs
- Safety Inspections
- Extra Work / Change Directives
- Requests for Information
- Purchase Orders
- Job T&M reports
- Personnel Time sheets

Navigating the App

Most of your movement through the application will start from the Main Menu or from icons and buttons on the application Title Bar.

Title Bar Icons

Here are the Title Bar icons that you'll use when operating the App:

📖	Tapping this icon will take you to the Active Forms Summary Worksheet where you can see the status of, and have direct access to, the forms and reports you're working on for the active job.
Preview	When you've completed work on a form, tap this button to see an image of the document that will be generated when you sign and submit the form.

Select for Preview	This button allows you to select multiple Personnel Time sheets to review and submit them as a batch in a single PDF document.
Sign and Submit	After you've previewed a form and you're satisfied with your work, tap this button to finalize the contents of the form and submit it via e-Mail to the designated recipients.
	Use this icon to access the Submitted Forms History Worksheet. There you can locate, review, resubmit or revise previously completed forms and reports for any or all Projects in the application database.
	The Camera icon appears in sections of a form where you can take pictures (if your iPad has a camera) and/or select pictures from an album on your iPad and have those pictures embedded in the form when it's submitted.
+	The "Add" icon appears on the Title Bar on most of the Project Settings pages. This is how you direct the App to create a new Project, a new Personnel resource, a new Contractor resource … etc.
	In the day-to-day management of your jobs, you'll often find that the Daily Log report for today will contain much of the same information that it did yesterday. When you tap this icon, the App will copy the information from the latest previously submitted log into your new Daily Log. Then you simply update or augment it based on today's observations, activities and plans.
	Tapping this icon takes you back to the "parent" page from certain Master Settings pages that require you to go two levels deep to access settings attributes.

Main Menu

When you use the iPad in "landscape" orientation the Main Menu persists in the left sidebar of the display. When you use the iPad in "portrait" orientation, you make the Main Menu appear by swiping your finger or stylus from the left edge of the screen toward the right. There are five sections in the Main Menu:

Project Selector

The Project menu item expands to a secondary menu from which you can:

- Select an active Project on which you want to work,
- Create and activate a new Project, or
- Select an archived Project for which you want to review prior work.

When you choose a Project with this selector it becomes your "active job". Subsequent work that you do in the Forms and Project Settings sections applies to the active job. To work on a different job, just choose it with the Project Selector, making it, now, the active job.

Forms Section

In the Forms section are menu selection items for each type of form that you'll create in your management of a job:

- Daily Log,
- Safety Inspection,
- Extra Work
- Request for Information, and
- Purchase Order

Working with Forms

For the most part, you'll be filling in the blanks, making selections from lists and using helpful user interface controls (e.g. to enter dates, weather conditions … etc.) The App saves your work as you enter it. You can navigate to a different part of the App, close the App and/or switch over to an entirely different App without worrying about saving the form on which you were working.

If you decide you want to delete a partially completed form and start over, go to the Active Forms Summary Worksheet and do a standard iPad right-to-left swipe on the cell for that form. Then just tap the Delete button that appears in the right side of the cell.

Photos

Often, you'll find it helpful to support or clarify an observation or request by adding a photograph to the form. Look for the Camera icon on the title bar of many of the data entry forms. Tap it to open a page that will allow you to take a picture with your iPad's camera and/or select pictures you already have in an album on your iPad.

You can "crop" the image to exclude extraneous content. You can add a caption to provide some detail about its content. When you submit the finished form, your pictures will be embedded into the PDF document as an addendum to the form. Each picture is individually labeled with the context (section) of the form to which it applies plus any caption text that you entered when you took or selected the picture.

You may also want to attach a separate, larger, more detailed copy of the photo along with the form. The App gives you the option to do that as you add each photo to the form. You can control the size of these photo image files attachments, globally or for each individual type of form, by adjusting Master Forms Settings (described below).

Submitting Forms

When you've completed work on a form, you Submit it via e-Mail to one or more designated recipients. To Submit a form, tap the blue "Preview" button on the Title Bar of the Form's entry page. The App will show you an image of the PDF document that will be generated and e-Mailed. If you're satisfied with it, tap the "Sign and

Submit" button on the Title Bar. Otherwise, tap the "Cancel" button to resume working on the form. Once you tap "Sign and Submit" you cannot make any further changes to the original version of the form even if you choose to stop it from being e-Mailed.

In the case of Personnel Time forms, there's another facet to the submission process. If you are managing time sheets for several employees and want to submit them as a batch in a single PDF file (instead of submitting them individually as separate forms) use the "Select for Preview" button on the Personnel Time title bar. A checkmark will appear in the selection row for each active Personnel Time form, indicating that it will be included in the batch of forms that will be submitted when you subsequently tap the "Preview" button. If you want to exclude any individual from the batch submission, tap on the checkmark to toggle it off before starting the preview, sign and submit process.

Signing Forms
If the form you're submitting requires a signature (see Default Forms Settings in the Master Settings section below) you will be presented with a signature box. You can use your finger or a stylus to draw a written signature for the Form, or you can use a Signature Stamp that you've previously created and saved (see User Settings in the Master Settings section below.)   To apply a Signature Stamp you simply enter the PIN/security code you used when you created it.

The signature page also allows for a second written signature that, when used, will be labeled "Accepted" and applied to the form as an additional signature.

Admin Section
The Admin section gives you access to:
- Your Due & Pending Worksheet which helps you manage your job reporting schedule;
- Job T&M forms which you use to report Personnel, Equipment, Trade Labor and/or Materials resources applied to the active job on a specified day; and
- Personnel Time forms, which you use to report weekly activity (time sheets) for all jobs for yourself and any other Personnel that you choose.

Due & Pending Worksheet
The Due and Pending worksheet shows you the next day that each regularly scheduled form is due to be submitted for every Project that you're actively managing. It also highlights submissions that are overdue. You can tap any item in the lists to simultaneously select the Project and form on which you want to work. Once you complete and submit the form, it will no longer appear in the Due & Pending list.

In some cases, you may want to remove a reminder from the Due & Pending list without submitting the subject form. Simply do a right-to-left swipe on the cell for

that form and tap the Delete button that appears in the right side of the cell. Note that deleting a reminder in this way also deletes any older reminders for that type of Form for the associated Project.

Job Time and Materials

The Job T&M form allows you to make and report a daily accounting of any or all of:

- Time charged by each employee Personnel resource that you have assigned to an active Project;
- Subcontractor / trade Labor resources applied to the Project;
- Equipment resources used on the Project; and
- Materials used and charged to the Project.

This form uses the same Personnel Time Cost Codes as the Personnel Time sheet (described below) and any time entries you make in the Job T&M form are automatically entered into the weekly Personnel Time sheets for the employees whose time sheets you choose to manage.

The Job T&M form also uses the same Labor, Equipment and Materials resource codes as the Daily Log form. Any of these resources reported in the Job T&M form can also be automatically included in the Daily Log form. Any of these resources already reported in the Daily Log form are automatically included in the Job T&M form as well.

Personnel Time

Weekly Personnel Time sheets can be maintained for designated employee Personnel resources that you have assigned to your Projects. The App will automatically display activity time entry sections for each Project to which those employees are assigned.

The first time you make entries for an employee after he/she has been assigned to a Project, the App will show activity entry items for every Personnel Time Cost Code that you have associated with the Project. To make your entries more manageable, you can easily remove codes (swipe the entry item from right-to-left) for activities that you don't expect the employee to perform for that Project on an ongoing basis. The App will remember that the next time you make entries for the employee. You can easily add those activity items back to the form at any time by tapping the (+) button.

Project Settings Section

This is where you define and manage the specific attributes and lists of Resources for each Project. The operations supported by the menu items in this section are:

- Projects Setup – define the identifying attributes of the job and assign primary Personnel responsibilities and roles.

- Project Resources – define and manage the lists of resources assigned or applicable to the active job, including:
    - Personnel – employees who may participate in working the job over the duration of the Project.
    - Contractors & Suppliers – third-party resources who may provide equipment, material and services to the job.
    - Labor – trades and manpower resources with their associated cost codes, units of measure and job-specific rates.
    - Equipment – implements, machinery, vehicles … etc. with their associated cost codes, units of measure and job-specific rates.
    - Materials – supplies and other materials with their associated cost codes, units of measure and job-specific rates.
- Forms Settings – manage any unique scheduling, content and distribution requirements of the Forms and reports you will prepare for the active job.

Master Settings Section

The Master Settings section of the App is where you manage the application attributes and Resources that are commonly applicable to all Projects and Forms. Master Settings are discussed in detail later in this document.

Application Workflow

You can start right in, setting up your first Project and defining resources as you go along. This method is fine for simpler jobs and in cases where the standard resource and forms settings and attributes are suitable to your operating practices.

Most of you, however, will first want to customize aspects of the App to your firm's specific nomenclature and branding. You can do this across the entire application using "Master Settings" and on a project-by-project basis using "Project Settings" as described in the following sections.

Once you've set up your Projects, the App helps you track the status of the forms and reports you're filling out (Active Forms Summary Worksheet), tells you what regularly scheduled reports are due or overdue (Due and Pending Worksheet), and lets you review, and if necessary revise and resubmit, forms that you've completed in the past (Submitted Forms History Worksheet).

Master Lists and Project Lists

The App maintains two kinds of resource "lists" – Master Lists and Project Lists. In your Master Lists, you'll want to maintain definitions of resources that you typically apply to many or all of your jobs. For example, you'll likely end up with most of your company Personnel and many, if not all, of your Contractors and Suppliers in their respective Master Lists.

Project Lists are the resources that you assign specifically to an active job. In some cases, the Project List starts out with virtually the same content as the Master List. For example, the list of Job Cost Codes applicable to a new Project initially consists of all Personnel Time Cost Codes defined in the Master List (see Personnel Time Setup and Scheduling settings.) To make the selection lists easier to manage when filling out your forms, you may choose to remove some of those Job Cost Codes from the Project List that you don't plan to use for the particular job. You can do that without affecting the Master List or other jobs that use those codes.

In other cases, the Project List starts out "empty" and you build it out as you go, e.g. the Project List of Contractors & Suppliers. Here, the App makes it easy to construct the list by letting you quickly:
- Select one from your Master List,
- Select one from another job's Project List,
- Select one from your iPad Contacts list, or
- Type in a new entry and, optionally, also add it to your Master List at the same time.

Maintaining Project Lists in this fashion provides a number of useful benefits:
- Master Lists can get very long. With Project Lists you can reduce the length of the selection lists you use when you're filling out forms and reports.
- Excluding non-applicable selections from a Project List can mitigate reporting errors and avoid unintended disclosure of sensitive information. For example, you wouldn't want the wrong subcontractor to see cost information that might be contained in an Extra Work form or an RFI.
- You can assign different unit cost values to the same resources for each/any individual job. The Master List items define Standard cost values. In your Project Lists you can override those values for any particular Project without affecting the other jobs or changing the values back and forth in the Master List.
- You may occasionally want to deal with a Resource (e.g. a specialized piece of equipment) that you don't want to maintain in the Master List because it's only going to be used for one or two active Projects. You can define those Resources in the Project List(s) where they won't bloat the Master List and will disappear from the application when the last Project that uses them is deactivated.

Master Lists are independent of any specific Project within the application. If you remove the assignment of a Master List resource from a Project List, that resource remains in the Master List and is still available to be assigned to other Projects. To delete a Master List resource altogether, you must do it under the Master Settings section.

Master Settings

The Master Settings section of the App is where you manage the application attributes and resources that are commonly applicable to all Projects and Forms. Spending a little time in this section will make your day-to-day use of the App easier and let you get your forms "branded" with your firm's identity.

User Settings

This is a good place to start your interaction with the App. First, enter the information about the primary user of the application – you or whomever you might be prepping the App to use. In doing this, you're also creating a record for the user/yourself in the Personnel Master List. The name and job title information in the Primary User's Personnel Master List record is printed in the "By:" signature block on the submitted Forms.

Here you can also create a "Signature Stamp" that will make it easier for you to sign forms when you submit them. Use your finger or a stylus to sign your name as you'd like it to appear, then assign (and remember) a PIN code for subsequent use. When you submit a form, you can simply enter your PIN code to stamp the form with this saved signature image. The PIN is intended to mitigate others from "signing" forms with your personal Signature Stamp or revising forms under your signature.

Master Forms Settings

This group of settings lets you personalize the branding and publication titles of the Forms and establish standard policies about when certain forms are due and to whom they should be submitted.

Common Forms Settings

Common Forms Settings establish standard or default values for settings that apply to all Forms in the App.

Forms Recipients

Here you can select one or more Default Forms Submit Contacts – the e-Mail address(es) to which *all* forms will be submitted unless different recipients are designated for a particular type of form under its own Forms Settings policy.

Custom Letterhead

You can customize the Forms' letterhead with your own logo and header information. A banner image graphic can be included at the top of each published form document. You can use the standard image that comes with the application, or you can supply your own. A third option is to omit the banner image altogether, in which case the Company Name and Web Site URL that you specified in your User Settings page will appear in the banner area of the published documents.

To supply your own banner graphic, prepare a file named "logo.png" that contains a maximum118-pixel high by 728-pixel wide image of your logo. Then use iTunes File Sharing to copy that file from your computer to your iPad. As the file name implies, the image should be in PNG image file format but the App will also handle JPG format. In either case, *the file must be named "logo.png".*

To copy the "logo.png" file to your iPad, connect your iPad to your computer and start iTunes (if it's not setup to start automatically.) A device icon associated with your iPad should appear on the header bar in the iTunes window. Click it to get access to its settings menu, then click the "Apps" menu selection. Once the settings page has opened and fill itself in, scroll down to the File Sharing section and select Journeyman from that list of Apps to open its Documents panel. Now "Add ..." or drag-and-drop your custom "logo.png" file from your computer into the Documents panel.

Alternatively, you can use iTunes to "sync" a JPG file containing a 118-pixel high by 728-pixel wide image to your iPad Photos repository. Then go back into the App and tap the box containing the current banner image. When the Photos selector pops up, tap through it to find and select your banner image.

If your logo image is larger that 118 x 728, the app will scale it down to fit. But you'll often get better printed results if you've pre-scaled it to size and seen how it looks first. If, as in many cases, your scaled logo is less than 728 pixels wide, you can select whether you want it to be aligned left, center or right on the submitted forms.

Finally, make sure the Use Banner Image switch is set to "Yes". If you set it to "No", your Company Name and Company Website will be shown as the letterhead.

Just beneath the banner on the published documents is a band of header text. By default, it is set to your Company Name and Company Address, but you can change it to whatever text you like.

Photo Attachments
In addition to having photographs embedded in your PDF forms, you can attach copies of the original photo to the e-mail submission. If you do that more often than not, you can flip the "Always Attach Photos as Separate Files" switch to "Yes". You'll still be able selectively say "No" as you add each photo to a form. You can also turn the switch off for any individual type of form it its form-specific Master Settings.

E-mails with multiple photo file attachments can become very large. They may exceed the maximum size allowed by your firm's server or chew up a lot of your cellular data allocation if you're not on an "unlimited" plan. So, the App allows you to control the size of the photo image files attachments with Small, Medium or Native (uncompressed) options. You can experiment with these settings to get the right balance of size and quality for your work.

Form-specific Settings

There are Master Settings you can establish and adjust for each specific type of form. For each of the individual types of forms, you can:

- change its Title to whatever you prefer it to be in the published documents;

- designate that a written signature is required when the form is submitted;

- override the Forms Submit Contact(s) lists (You might, for example, choose to send Daily Logs to a projects administrator in your organization, while always sending Personnel Time forms to a designated individual who handles payroll.); and

- override its Photo Attachments settings.

For **Daily Log** forms you can also specify:

- which sections of the standard form you want to have included in your published forms;

- how the sections are labeled (Section Headers);

- how many Weather observation sessions / shifts you want to record (1 to 3) and how they should be labeled;

- whether or not you want to show Cost Codes in the resource table sections of the form; and

- whether or not Section Headers are printed on the forms if you don't make any entries for the section when your filling out the form and, if so, how much space to leave on the printed form for those empty sections.

Daily Log, Safety Inspection, Job T&M and Personnel Time forms have scheduling policy settings that you can adjust. The App uses these settings to give you indications of next-due and overdue status of report submissions for each active Project (in the Due & Pending Worksheet described above.)

The **Safety Inspection** Master Settings page is also the place where you manage the Master List of Safety Inspection Categories and the Safety Inspection Items comprising those categories. The App comes with a starter set of inspection category and item definitions, but you are encouraged to change, add to, and/or reorder the lists so they reflect the actual inspection criteria you use for your projects. There's also an option to control whether or not entire Inspection Categories should be omitted from the published form if there are no inspection observations reported for any of their Inspection Items.

Extra Work, Request for Information and Purchase Order forms have automatically incrementing accession numbering mechanisms. You can specify / change:

- the label that will appear of the respective form for that number (e.g. for an Extra Work form you may want it to be "SWD" # instead of "CCD" #);
- the Increment value that the App uses to generate those ID numbers (With the standard value of "1", for example, the first Request for Information for a Project will be identified as RFI #1, the next as RFI #2 … and so on. If you change the Increment value to "10", the first would be RFI #10, the next RFI #20, then RFI #30 … etc.); and
- a Zero Padding setting that controls the minimum number of digits that appear on the form for the accession number (For example, with Zero Padding set to 4, the fifteenth Request for Information form would be marked: "RFI # 0015".)
- For Purchase Order forms, the accession number can also be prefixed by either or both the Project's Job Number and Job ID. For example, the third Purchase Order for a Project with Job Number 200 and Job ID "DOT" might appear as: "PO # 200DOT003".

Request for Information forms are submitted with either Standard, High or Critical Priority attributes. Based on that priority, the App will suggest a Response Due Date. You can adjust the number of business days or calendar days that the App uses to calculate the target date for each priority level.

The **Personnel Time** Master Settings page is the place where you manage the Master List of Personnel Time Cost Codes that can appear on your Personnel Time and Job T&M forms. The App comes with a starter set of codes, but you are encouraged to change and/or add to the list so it reflects the actual codes you use and the activities you track.

Personnel Time master settings page also establish the rules for managing how overtime is calculated. Here you designate the number or Regular Hours per business Day, the number of Regular Hours in a business Week, and whether or not hours worked on the weekend should always be considered overtime. Overtime hours shown on the time sheets are calculated using these settings for the selected Overtime Type setting as follows:

- **None**: No differentiation between regular and overtime hours. The other settings are ignored and the time sheet simply contains total hours worked for each Time Cost Code for each Project.
- **Day**: Hours worked in excess of the Regular Hours per Day setting on any single day are considered overtime. If Weekend Always Overtime is selected, any hours worked on a Saturday or Sunday are also considered overtime. If not selected, weekend hours for the day that do not exceed the Regular Hours per Day setting are treated as regular hours.

- **Week**: Total hours up to the Regular Hours per Week setting are considered "regular" hours and all hours in excess of that are considered overtime hours without regard to the number of hours worked on any individual day. If Weekend Always Overtime is selected, any hours worked on a Saturday or Sunday are considered overtime even if the Regular Hours per Week threshold is not met during weekdays.
- **Both**: Like the "Day" setting except once the number of regular hours worked in a week exceeds the Regular Hours per Week setting, all subsequent hours are considered overtime. If Weekend Always Overtime is selected, any hours worked on a Saturday or Sunday are also considered overtime even if the number of regular hours worked has not exceeded the Regular Hours per Week threshold.
- **Week+**: Like the "Both" setting except once the total number of hours (regular or overtime) worked in a week exceeds the Regular Hours per Week setting, all subsequent hours are considered overtime. If Weekend Always Overtime is selected, any hours worked on a Saturday or Sunday are also considered overtime.

The **Job T&M** Master Settings allows you to specify:
- Which sections of the standard form you want to have included in your published forms,
- How the sections are labeled (Section Headers),
- Whether or not Cost Data should be included in the report, and
- How employees should be identified in the Personnel time section of the form – by name, by ID or both.

Resources
There are five Master Lists of resources that you can define and maintain.

Personnel
This is your Master List of company employee resources. These are the people for whom you will track and report work time in the Job T&M and Personnel Time forms. You can add people to the list "by hand" or you can pull them in from your iPad Contacts repository. If, after using the App for day-to-day operations, you've created project-specific Personnel resources, you can selectively convert them to Master List resources here as well.

Contractors & Suppliers
This is your Master List of Contractor & Vendor resources. These are the sources of manpower, labor and equipment that you track in the Daily Log form and the people to whom you'll issue Extra Work / Change Orders and RFIs. Just like Personnel resources, you can add them to the list "by hand", pull them in from your iPad Contacts repository and/or convert project-specific Contractor & Vendor resources.

Labor, Equipment and Materials

The Master Lists of Labor resources, Equipment resources and Materials resources are managed a bit differently. Rather than starting with an empty list (as is the case with Personnel and Contractor & Vendor resources) these lists are initialized with some industry standard resource items. You can and should review each item, change their names if you like, assign your cost codes if you use them, and assign a standard unit price and units-of-measure.

You can, of course, add any number of new/different items. Or, if there are items in the lists you will never use, you can delete them from the Master List.

The other difference between these lists and the Personnel and Contractors & Vendor lists is that all of the Labor, Equipment and Materials Master List items are automatically assigned to Projects at the time that the Project is created. You can cull those lists back for individual Projects using the operations under the Project Resources menu as described below.

Project Settings

There are three items in the Project Settings section of the Main Menu.

Projects Setup

Once you have the global application settings adjusted to your liking, you can create your first Project. This is a simple matter of entering some demographic information about the Project, and establishing the starter set of Personnel Time Cost Codes for Personnel Resources you assign to the Project. Specifically, the key attributes of a Project that you'll supply are:

- Job Number: a unique 1- to 9-digit number that the App uses to identify and differentiate the Project from all others. NOTE: Once created, a Project's Job Number cannot be changed. A Job Number can only be reused if you delete its Project from the App. Doing so will erase all Forms and Settings associated with that Project.
- Project Name: whatever name you want to assign to the job.
- Job ID: an optional 1- to 16-character string that you can use an additional identifier that may more closely conform to your current job identification scheme or to represent phases of the Project or whatever may be useful in your reporting workflows. Unlike the Job Number, this ID can be changed at any time.
- Project Location, Site Phone number and Site Fax number.
- Primary Project Role assignments: one to four Personnel assignments (e.g. Project Manager, Project Engineer, Superintendent…) whose names will appear in the header section of each form. NOTE: You can change or remove the Primary Role Titles back in the Master Settings – Common Forms Settings section of the App.

- Job Cost Codes: the list of Personnel Time Cost Codes that you want to appear in the Personnel Time and Job T&M sheets for Personnel resources that you assign to the Project. When you create the Project, the list consists of all the Personnel Time Cost Codes you've defined in the Personnel Time setup page. Often, a particular job will only employ resources that use a limited subset of those codes. You can pare down the list here (swipe the item from right-to-left) to make it easier to enter personnel time later on.

There is no arbitrary limit on the number of projects that you can have active at any time – it's constrained only by the available storage space on your iPad and your willingness to deal with very long selection lists.

Project Resources

You can further refine the list of resources assigned to the Project (Project Lists) using the operation under the Project Resources menu item:

- Personnel – employees who may participate in working the job over the duration of the Project. NOTE: If you plan to make timesheet entries for yourself or an employee for a Project, you'll first need to assign them to the project here and ensure that their Manage Time Sheets switch is turned on.
- Contractors & Suppliers – third-party resources who may provide equipment, material, manpower or other services to the job.
- Labor – trades and manpower resources with their associated cost codes, units of measure and job-specific rates.
- Equipment – implements, machinery, vehicles … etc. with their associated cost codes, units of measure and job-specific rates.
- Materials – supplies and other materials with their associated cost codes, units of measure and job-specific rates.

As you work with the App, filling out and submitting forms, you'll find shortcuts in the process that allow you to do much of the day-to-day maintenance of these resource lists "in-line", without having to jump back out to the Project Resources menu item.

Project Forms Settings

Use this section to make adjustments to the policies and attributes controlling Forms submission that apply specifically to the active Project. A common example of this is the Form Submit Contacts list. The e-Mail recipient(s) of particular Forms related to a Project will often be different from one job to another. Using Project Forms Settings, you can override or expand the Master List of recipients for each type of form.

Other common, Project-specific overrides and customizations include:

- Change the title of the form to one that may be more familiar to a specific customer or to the subcontractors working on the particular job. For

example, you might change the title of the "Extra Work" form to "Construction Change Directive" for certain Projects but not for others.

- Override the Photo Attachment options for the form.
- Change the Scheduling policy for when forms are due for the Project. An example might be that certain jobs require multiple Safety Inspections per week instead of once per week.
- Override the localized units for Weather reporting in the Daily Log to report temperatures in Centigrade and precipitation in centimeters vs. Fahrenheit and inches for jobs on one side of the border or another.
- Include or exclude entire Categories of Safety Inspection Items depending on the nature of the job.
- Change the standard response time targets for RFIs.
- Change the accession numbering options for Extra Work, Request For Information and Purchase Order forms.
- Specify whether or not cost data should be included in Job T&M reports for a specific Project.

Database

An important concept in your ongoing operation of the application is managing its database. All the Resource lists, Projects and Forms information managed and generated by the application are contained in a database and associated collection of adjunct files on your iPad. The last item in the Master Settings section provides tools that you use to manage the database.

Backup Current Database

Use this function to make a backup copy on the iPad of the database without affecting the content of the active database. Note: The App manages only one instance of a user backed-up database on the iPad. Whenever you perform a Backup operation, the prior backed-up copy of the database is overwritten.

Restore Backed Up Database

In addition to the backup copy of the database that you explicitly create (as described above), the App automatically creates a contingency backup copy of the database in the iTunes accessible document folder whenever you minimize the App (i.e. press the iPad "Home" button.) When you use the "Restore Backed Up Database" function, you have the option to select either the backup copy you explicitly created or a contingency backup copy. Remember, if you restore the "User Backed Up Database", you'll lose any changes you've made since the time when you made that backup copy.

Copying Databases To/From Your Computer

You can use iTunes File Sharing to copy the database from your iPad to your personal computer. First, use the Export Database function to make your current active database accessible to iTunes File Sharing.

Now, connect your iPad to your computer and start iTunes (if it's not setup to start automatically.) A device icon associated with your iPad should appear on the header bar in the iTunes window. Click it to get access to its settings menu, then click the "Apps" menu selection. Once the settings page has opened and fill itself in, scroll down to the File Sharing section and select Journeyman from that list of Apps to open its Documents panel. The database is contained in a file named "journeyman.zip". Now you can "Save to …" or click and drag it from the Journeyman Documents panel to a folder or the desktop on your computer.

If you want to replace the database on your iPad with one you've previously copied to your computer, connect your iPad to your computer as described above to access the App's File Sharing Documents panel. Now "Add …" or drag-and-drop a "journeyman.zip" (or an older version's "cs.sqlite") database file from your computer into the Documents panel. Start the App normally the next time you want to use it and then use the Import Database function to install that database.

Clear All Archived Project Data

When a Project is completed, you will typically deactivate it by designating it as "archived" from the Projects Setup menu item. Archived Projects are retained in the database so you can review any of the forms and reports that were generated for the Project when it was active. You can individually remove archived projects from the database through the Projects Settings functions. If, however, you want to purge all your archived project data from the system in a single operation, you can use this function. None of the data for active Projects nor any of your Master List resources are affected.

Clear All Project Data

This operation clears ALL Project data, including Active Projects, from the database, leaving only your Master Settings and Master List resources intact.

Restore Default Database

This operation effectively starts you over from scratch. The database reverts to its factory default state. Export or Backup your current database first if there's even the slightest chance you'll want to get back to it.

Be Careful with Database Operations

USE CAUTION when performing any of these operations. While they're provided to help ensure the integrity of your data, you can lose a lot of data and invested effort very quickly if you're not careful.