Trimble

5 steps to real-time work in progress visibility

for project leaders

Contents

Introduction

Project leaders can't afford to be the last to know. Without real-time work-in-progress (WIP) visibility, risks stay buried in spreadsheets and reports until they've already escalated into delays, rework or strained client trust.

As a Spectrum or Vista customer, you already have financial clarity. The next step is connecting that data to daily project activity so your leaders gain a living picture of job health, not just a month-end snapshot.

5 steps to building ongoing visibility

1. Connect project management with financials

Sync ProjectSight to Spectrum or Vista so your projects run from one unified data set.

- ☐ Sync budgets, contracts, customers and vendors directly into ProjectSight when a job is created.
- ☐ Eliminate duplicate entries and ensure teams work from a single source of truth.
- ☐ Enable project managers to work in ProjectSight, while financial leaders in Spectrum or Vista stay fully aligned.

This step closes the gap between financial accuracy and daily project visibility.

2. See budgets and costs in real time

Static reports can leave executives reacting too late. Real-time WIP visibility means every financial decision is based on the latest data.

- ☐ Monitor original, projected and current budgets in one view.
- ☐ Receive hourly job cost actuals (payroll, accounts payable invoices) flowing directly from Spectrum or Vista into ProjectSight.
- ☐ Assess daily how projects perform against the original estimate.

Continuous updates allow you to catch profit fade early, not after the project closes.

3. Standardize change order management

Untracked or delayed change orders are one of the biggest visibility gaps.

- [ ] Log potential change orders directly from RFIs or issues in ProjectSight, creating a clear documentation trail with photos, notes and attachments.
- [ ] Route every change through the same workflow with automated sync back into Spectrum or Vista when approved.
- [ ] Eliminate manual re-entry and keep financials aligned with field reality.

A standardized process makes the cost impact visible before it becomes a surprise in the forecast.

4. Empower field teams to capture data instantly

Leadership only sees what the field records. Make that process easy.

- [ ] Field teams use ProjectSight's mobile apps to capture RFIs, punch items, safety reports and issues—often tied to drawings, with photos or voice notes—directly from the jobsite.
- [ ] Customizable checklists ensure consistency in inspections, quality control and daily logs.
- [ ] All data flows up to project managers and leadership in real time.

The faster field data is captured, the sooner leaders see risk emerging.

5. Use dashboards and automated reporting

Executives need clarity, not noise. Dashboards and scheduled reports keep the right metrics front and center.

- [ ] Configure executive dashboards to display KPIs like overdue items, open RFIs, pending submittals and change exposure across projects.
- [ ] Automate reports (financial, operational, compliance) for daily, weekly or monthly delivery.
- [ ] Compare performance across jobs without chasing updates.

Dashboards and reporting transform visibility into action, enabling earlier, more confident decisions.

From checklist to reality

These five steps demonstrate how Spectrum and Vista customers can evolve from reactive reporting to proactive visibility. ProjectSight extends your system to capture daily activity, standardize processes and give executives real-time WIP clarity across the portfolio.

See how Spectrum and Vista customers use ProjectSight to gain full project health visibility.

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