



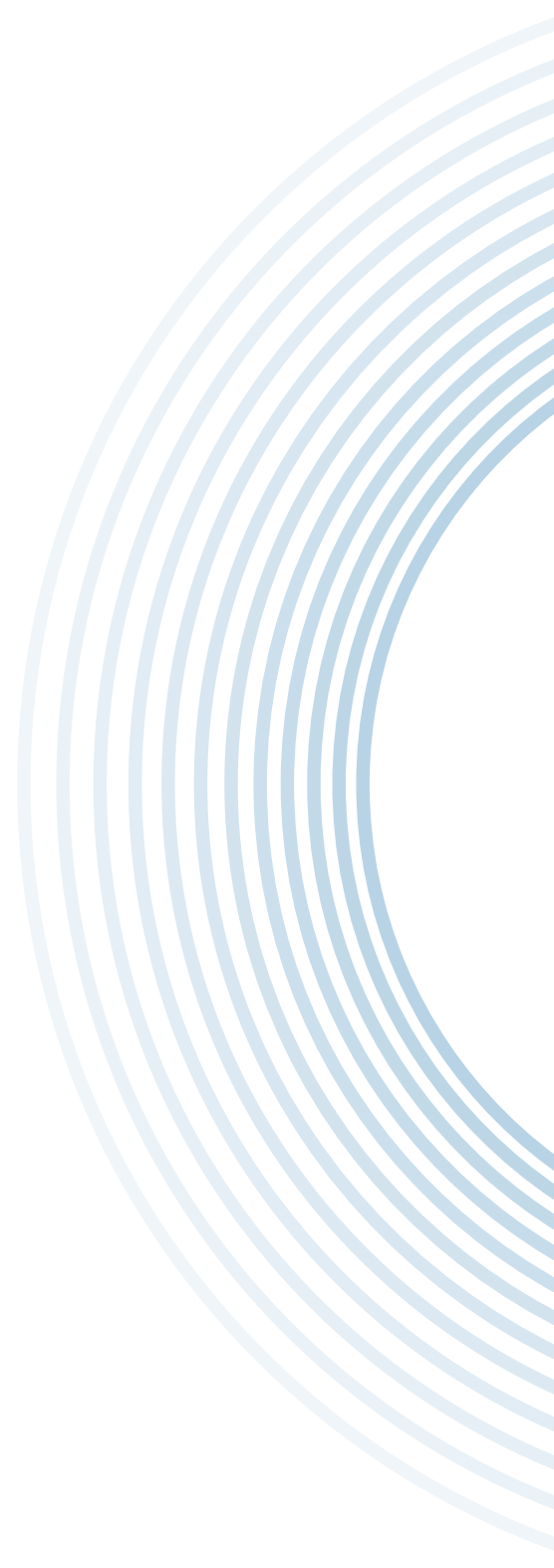
# TECHNICAL IMPLEMENTATION GUIDE: CONNECTING PROJECTSIGHT TO SPECTRUM OR VISTA

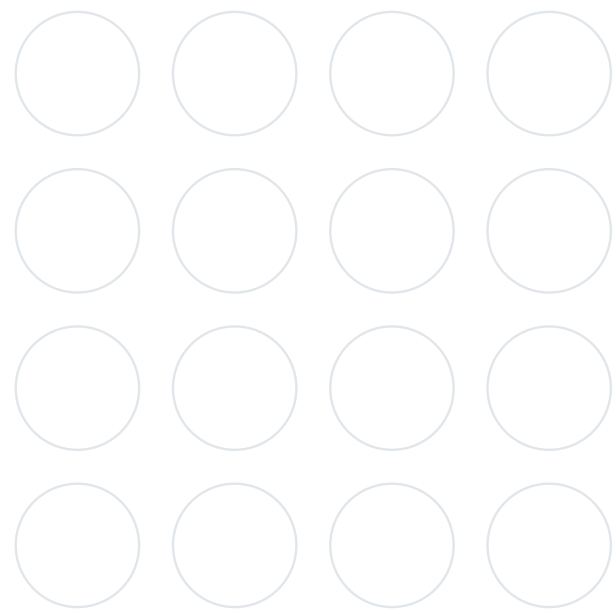
CHANGE ORDER WORKFLOW SETUP AND  
INTEGRATION OVERVIEW



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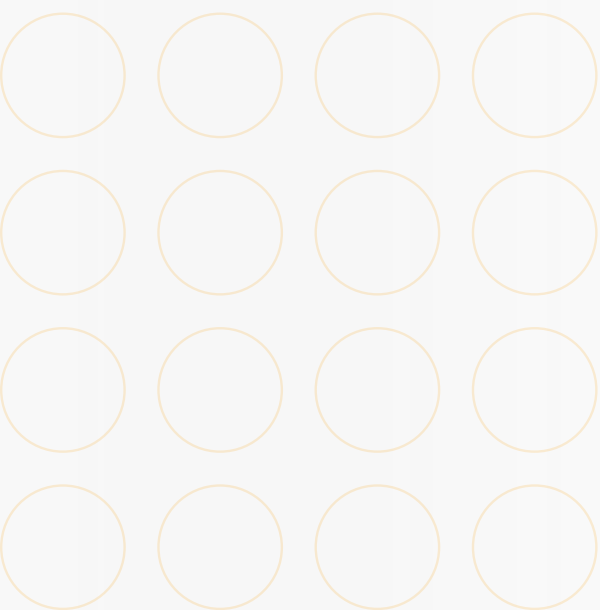


## Executive summary

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ProjectSight extends Spectrum or Vista with a connected change order workflow—from field capture to cost tracking and forecasting. This guide outlines how to implement that workflow in phases, configure system integration, and align team roles while reducing manual entry, approval delays, and budget blind spots.

Whether you're a PM, controller, or operations lead, this document is built to help you evaluate ProjectSight's setup process, integration points, platform requirements, and support model—so you can plan with clarity and implement with confidence.





# 1. Overview: united CO workflow with ERP sync

ProjectSight enables construction teams to manage change orders from field documentation to ERP impact without relying on spreadsheets, email threads, or re-entry.

## Key features:

- Direct field-to-office CO logging (Daily Reports, RFIs, markups)
- Configurable multi-step CO approval workflows
- Native integration with Spectrum or Vista (COs, budgets, subcontracts, POs)
- Real-time dashboard views for pending and approved COs
- Full audit trail per CO (linked drawings, RFIs, issues)

## 2. Implementation phases

Implementation is typically phased in three stages, allowing for quick wins and minimal disruption.

Phase 1: ProjectSight standalone – field setup + workflow configuration on the web

**Focus: Enable CO capture and approval workflows within ProjectSight before enabling integration.**

Setup tasks:

- Upload and version-control drawings
- Configure CO form fields (cost category, impact, trade)
- Establish approval workflows (Draft → Pricing → Submitted → Approved)
- Enable mobile capture with markup, photos, and voice notes
- Link RFIs/issues directly to CO records

User roles:

- Field Engineers: PCO initiation
- Project Managers: Approval routing
- Admins: Workflow and permission setup

### OUTCOME

Field teams can capture documentation like RFIs and issues from the jobsite. PCOs are initiated and managed via the web, ensuring every change order begins with full context and traceability.



## Phase 2: integration – connect to spectrum or vista

**Focus: Sync approved COs and associated financial data into Spectrum or Vista.**

### Integration points:

- Project Linking: Jobs linked in ProjectSight via project settings
- Budget Sync: One-way sync of original budget (ERP → ProjectSight or ProjectSight → ERP)
- CO Sync: Approved COs push into ERP job budgets (hourly batch sync)
- Subcontract/PO Sync: (bidirectional)
- ERP Shortcuts: PMs can access ERP screens via Trimble ID SSO links

### Technical notes:

- Budget codes (Phase + Cost Type) must match between systems
- All sync events are logged and timestamped

## OUTCOME

Approved COs show up in ERP job budgets, with reduced manual entry and aligned cost tracking.





## Phase 3: Forecasting + reporting enablement

**Focus: Utilize Budget Views and reports to visualize CO exposure before approval.**

Setup tasks:

- Configure dashboards to monitor change order impact across projects
- Schedule CO reporting aligned to WIP or forecast reviews
- Train PMs and controllers to use dashboards for forecast risk

### OUTCOME

Pending COs are visible across teams. Forecasting includes full financial impact—even before ERP sync.

### 3. Sync behavior by record type: what moves between systems

Record type	Sync behavior	Direction	Notes
Potential change orders	Approved only (Spectrum) Approximate, Pending, Approved (Vista)	One-way (PS → ERP)	
Change orders	Approved only	One-way (PS → ERP)	<i>Draft/submitted tracked in PS only</i>
Subcontracts	Approved only	Bidirectional	<i>Subcontract # matches across systems</i>
Purchase orders	Approved only	Bidirectional	<i>PO# matches across systems</i>
Budget codes	Approved only	One-way (ERP → PS) or PS → ERP)	<i>ProjectSight owns the budget once synced and will overwrite any changes made to the estimate in the ERP</i>
Forecast adjustments	Manual entry	Not synced	<i>Forecasting write-back to ERP is not yet supported</i>
Actual costs	Read-only sync	ERP → PS	
Documents, RFIs, drawings	Not synced	Managed in PS	<i>Remain local to ProjectSight; not pushed to ERP</i>



## 4. Platform & configuration notes

Area	Consideration
Mobile access	iOS + Android fully supported; Microsoft Surface not optimized
Permissions	Role-based access configurable by project, module, and field
Collaboration	Unlimited collaborators (subs, architects, owners) included
Offline use	Supported with automatic sync when reconnected
Scheduling	No built-in Gantt module; external schedules can be stored in Trimble Connect
Trimble play	No direct integration; payment workflows flow through ERP
Checklists/forms	Custom checklists supported; data does not push into ERP
Licensing	Named users only; minimum of 5 PM licenses required to activate integration

## 5. Implementation support & training

ProjectSight can be implemented with support from Trimble or through internal or third-party teams, depending on your preferred integration approach.

Trimble offers complete implementation services tailored to Spectrum and Vista environments—including integration via the Trimble Construction One platform. These services are designed to accelerate rollout, ensure alignment with internal workflows, and reduce administrative burden on project teams.

For teams with internal development resources or preferred partners, ProjectSight also supports custom-built integrations via open APIs. This flexibility allows organizations to implement and extend the solution in a way that aligns with existing IT strategy and support models.



### Trimble-led implementation services include

- Discovery and CO workflow mapping
- Configuration of forms, roles, and workflows
- ERP integration setup and testing (Trimble Construction One)
- Role-based training for PMs, controllers, and field users
- Reverse demo (pre-implementation process walk-through)
- Access to Trimble Learn (on-demand videos, step-by-step guides)
- U.S.-based support via chat, phone, and email



## 6. Timeline & readiness summary

Phase	Duration	Key outcome
Phase 1: Field Use	2-3 weeks	Live CO capture and approval tracking in ProjectSight
Phase 2: ERP Sync	1-2 weeks	Approved COs appear in Spectrum or Vista
Phase 3: Forecasting	1-2 weeks	CO exposure is visible in forecasting dashboards

# Still evaluating?

See how other teams are driving faster CO turnaround and better forecast visibility with ProjectSight.

[Learn More >](#)