Field Tracking: how-to guide

IntraSync
November 21, 2026

Field Tracking follows precast pieces after they leave the plant: deliveries arriving on site, each piece's install steps, field quality observations and daily reports, plus crew time and T&M tickets where they are switched on. Crews use it on site to record the work as it happens; managers use it to follow progress, approve time and tickets, and set up jobsites, crews and install sequences.

> *Written for: Field crews and foremen, Site and project managers, Field Tracking administrators.*

> *In the pictures, a numbered red box marks where to click or type. Where a picture has more than one box, the numbers give the order.*

In this guide

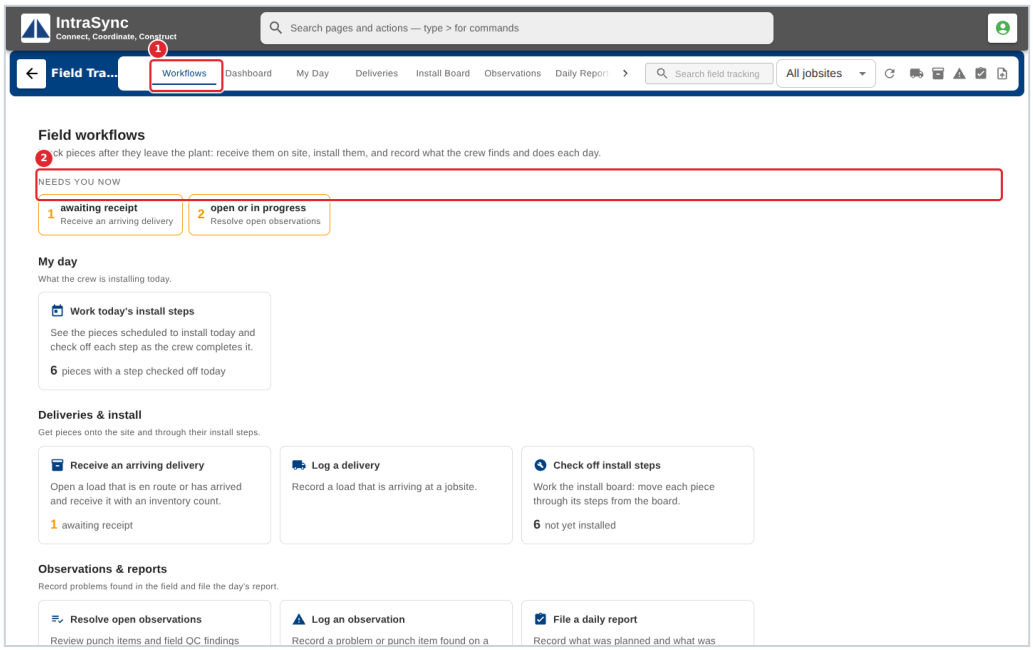
- 1. Find your way around Field Tracking
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- 15. Write up a T&M ticket and get it signed
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- 19. Define the install sequence with phase sets
- 20. Choose units and field rules
- 21. Set up the daily report and weather limits
- 22. Switch on crew time and T&M tickets

1. Find your way around Field Tracking

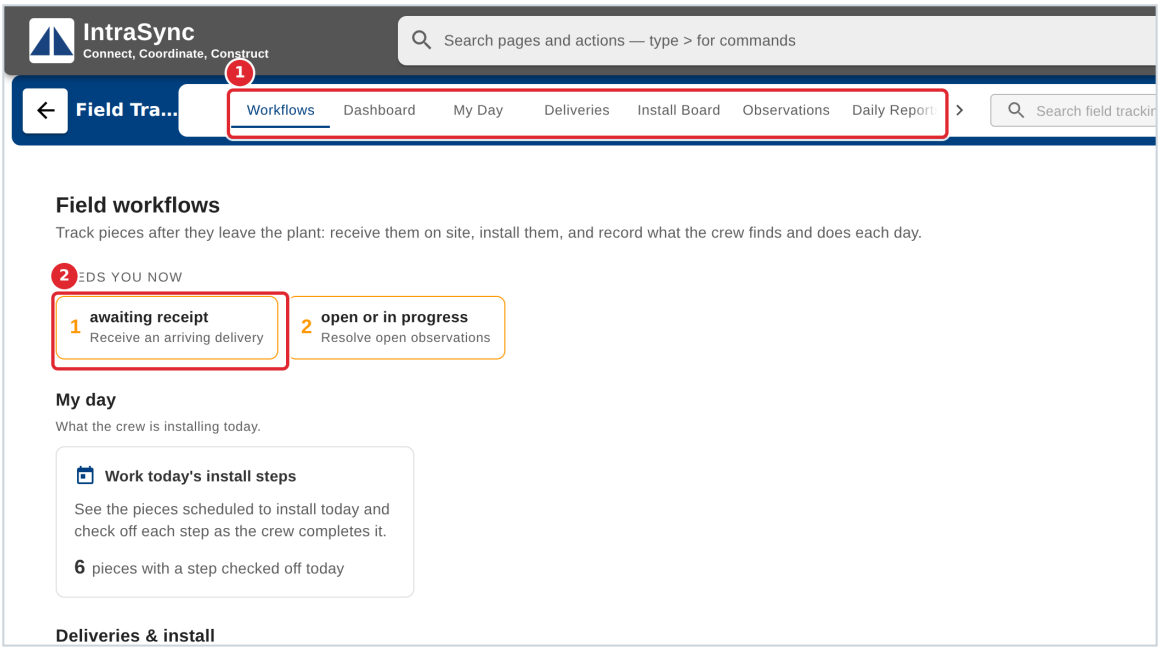
Know where each task lives before you start, so the crew's daily work takes a few taps.

Before you start:

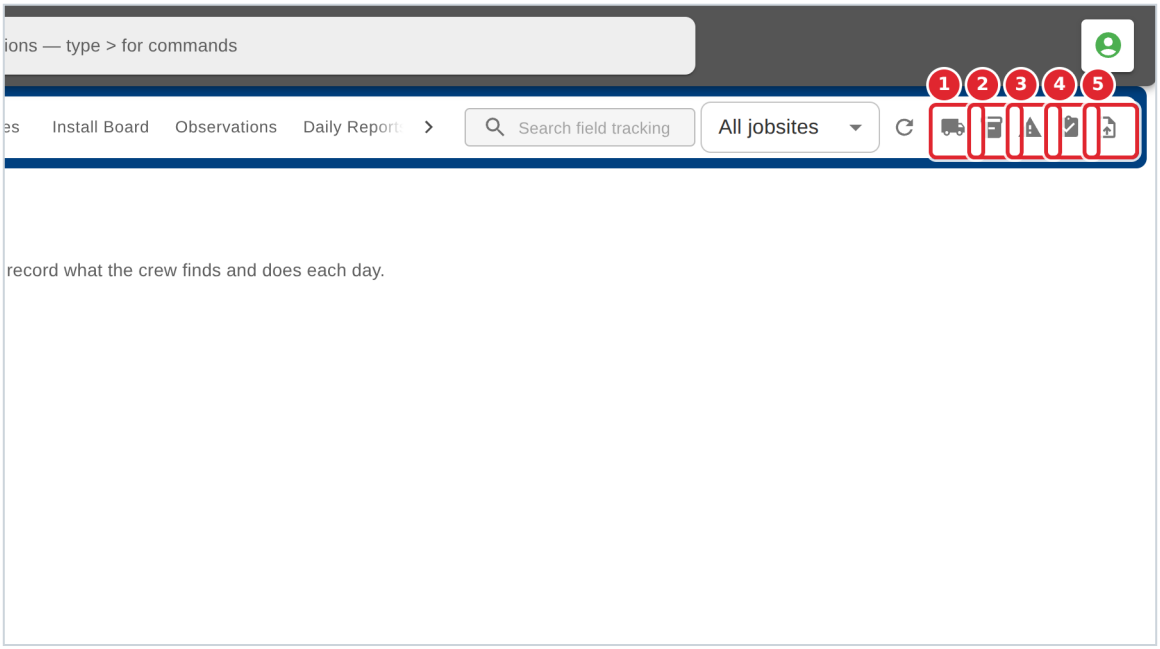
- Your IntraSync account has Field Tracking access. Crew members see the daily tabs; managers and administrators also see Manage.



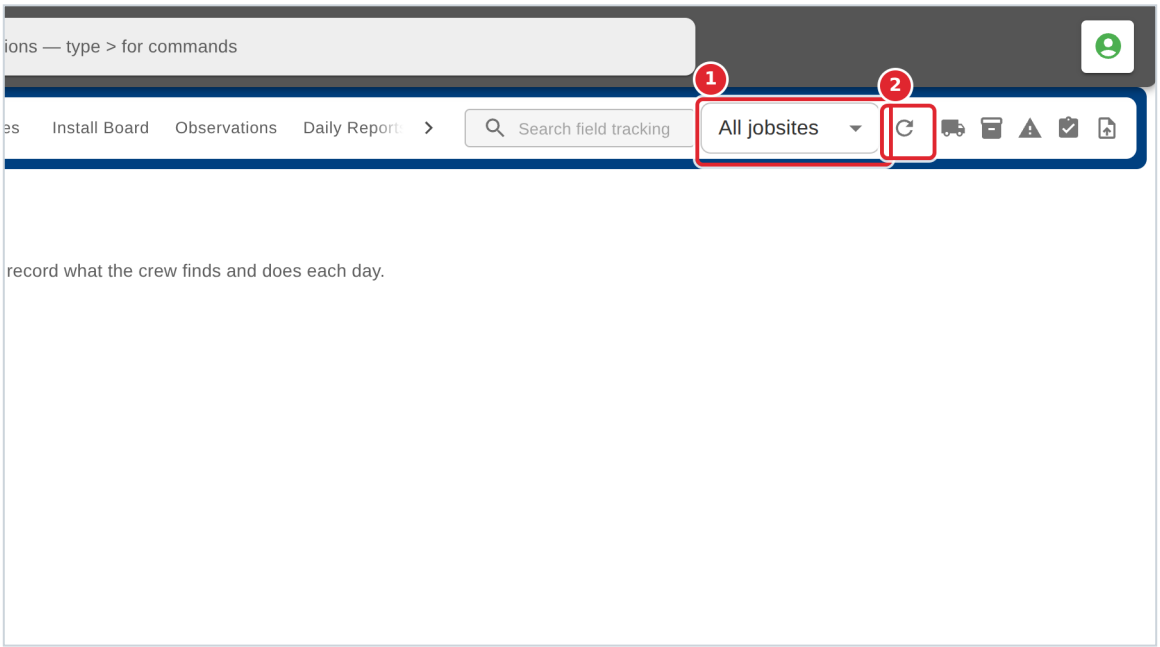
Step 1. Open Field Tracking. It starts on Workflows: the jobs that need you now come first, then every workflow by stage.



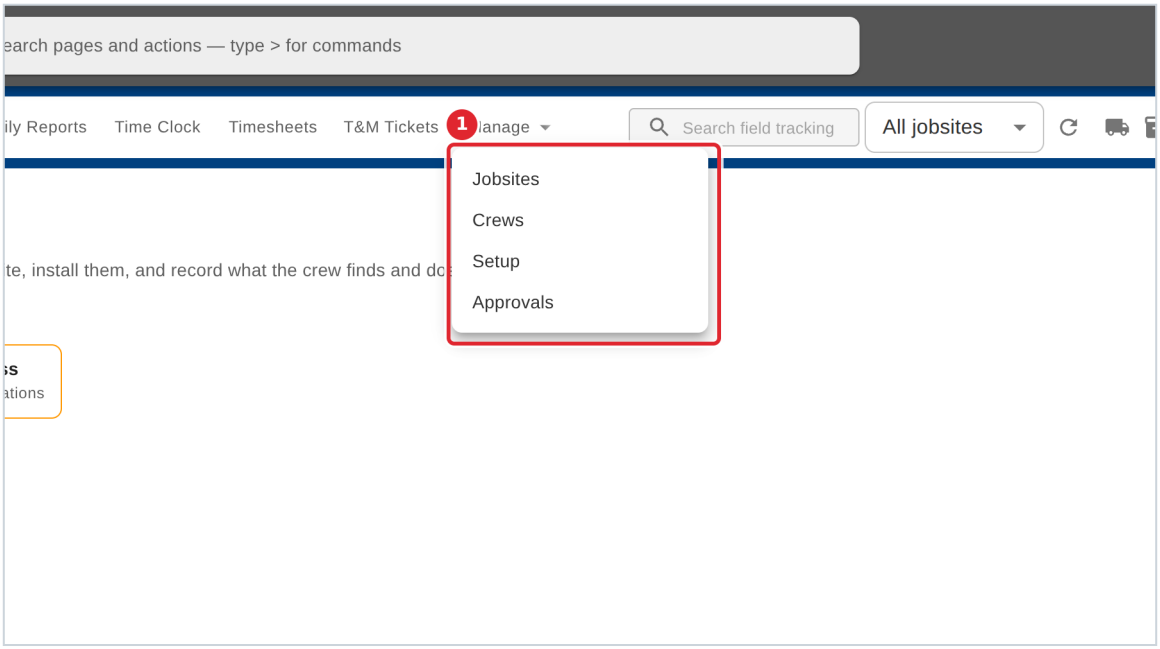
Step 2. Use the tabs along the top to move between the hub's screens. Select a workflow card to jump straight to its screen.



Step 3. Use the quick-entry buttons in the header to log a delivery, receive a load, log an observation, start a daily report or upload a file from any screen.



Step 4. Choose a jobsite to narrow every screen to that site, or keep All jobsites. Select Refresh hub data to reload.



Step 5. Managers open Manage for Jobsites, Crews, Setup and Approvals.

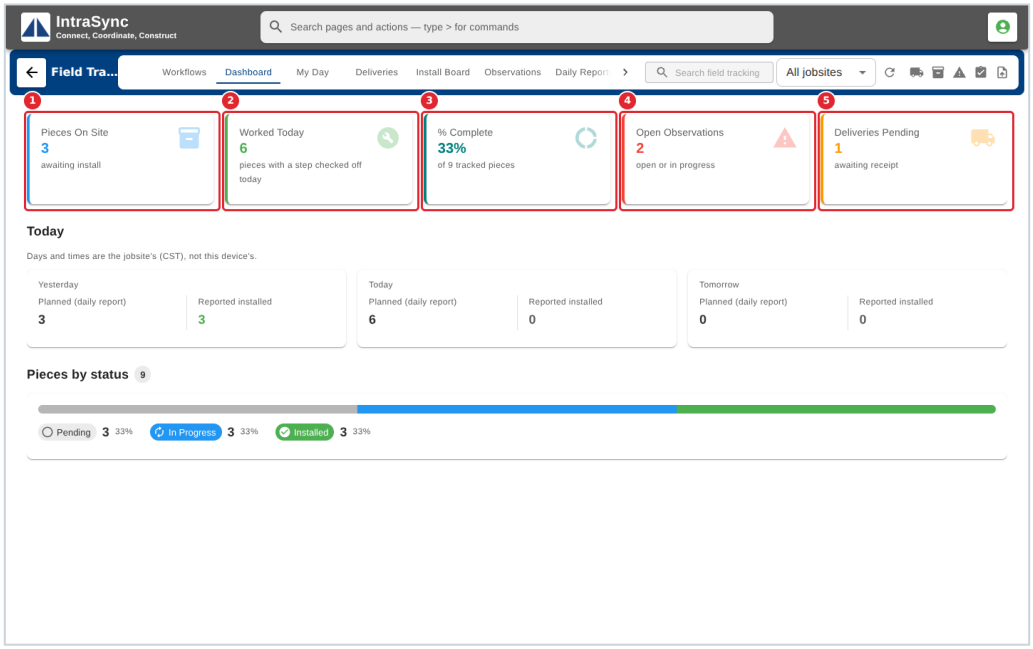
Tips:

- On a narrower screen the tab strip scrolls sideways: use the arrow at its end to reach Time Clock, Timesheets, T&M Tickets and Manage.
- Time Clock, Timesheets and T&M Tickets appear only when your company has switched crew time or T&M tickets on (Manage > Setup > Time & T&M).

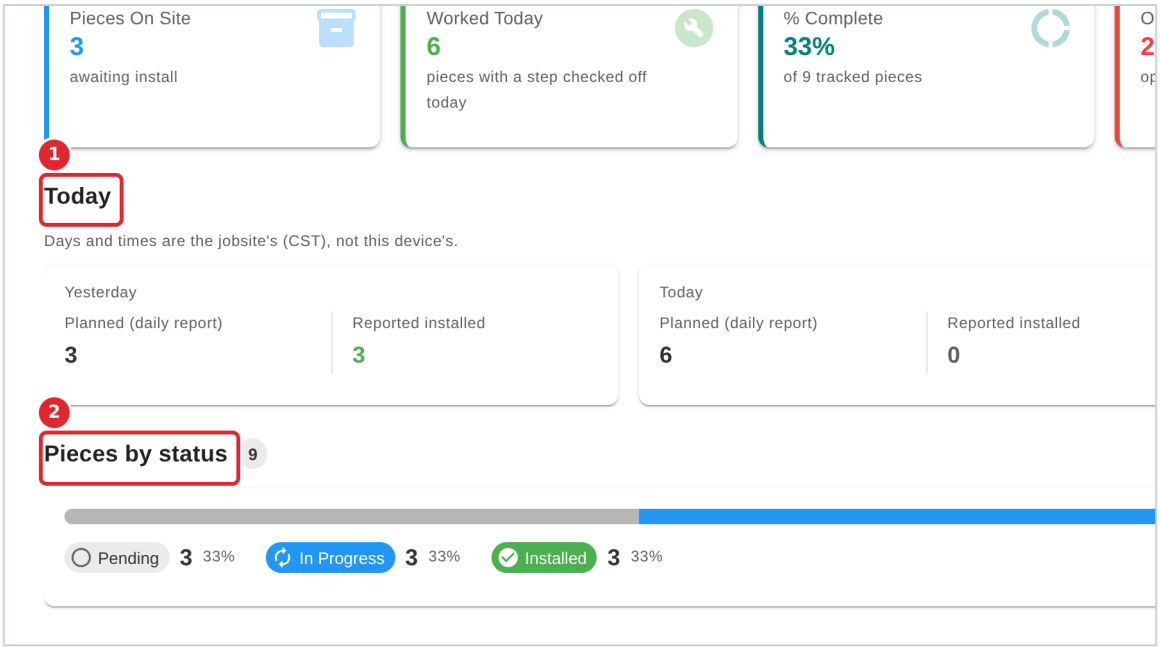
This is shown in the Field Tracking video at 0:03.

2. Check the day's figures on the Dashboard

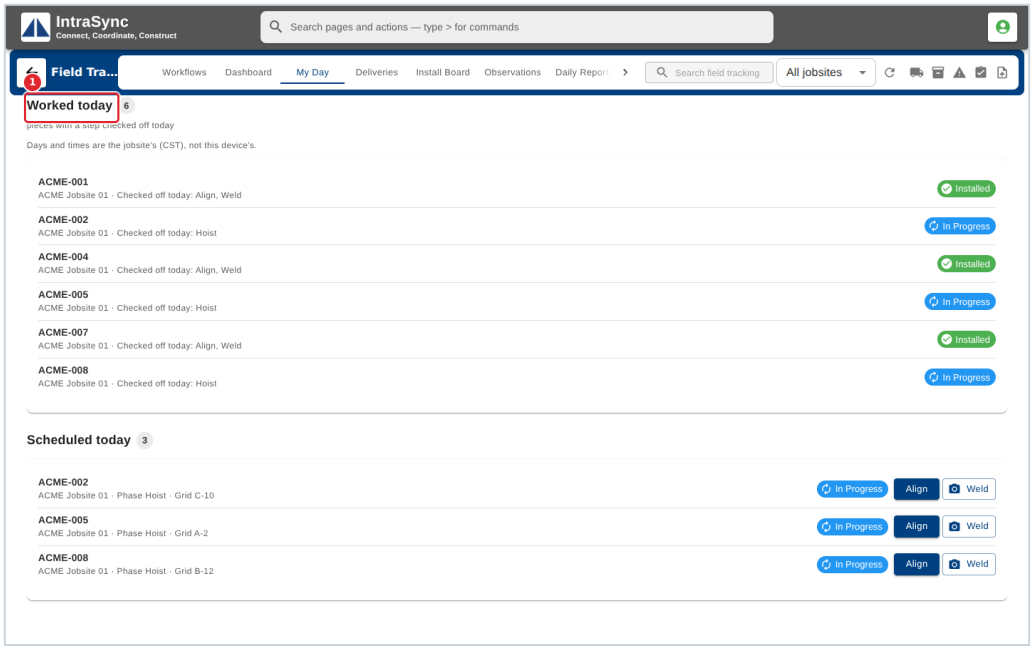
See at a glance how the field is doing today, and open the list behind any figure.



Step 1. Select Dashboard to see the field's key figures: pieces on site, pieces worked today, percent complete, open observations and deliveries pending.



Step 2. Read Today for yesterday's, today's and tomorrow's planned pieces against what was reported installed, and Pieces by status for the overall split.



Step 3. Select a figure to open the list behind it. Worked Today opens My Day with the pieces worked today listed first.

Tips:

- Days are counted on the jobsite's clock, as the note under Today says, so every site reads its own day.
- A figure you cannot select leads to a tab your account does not have.

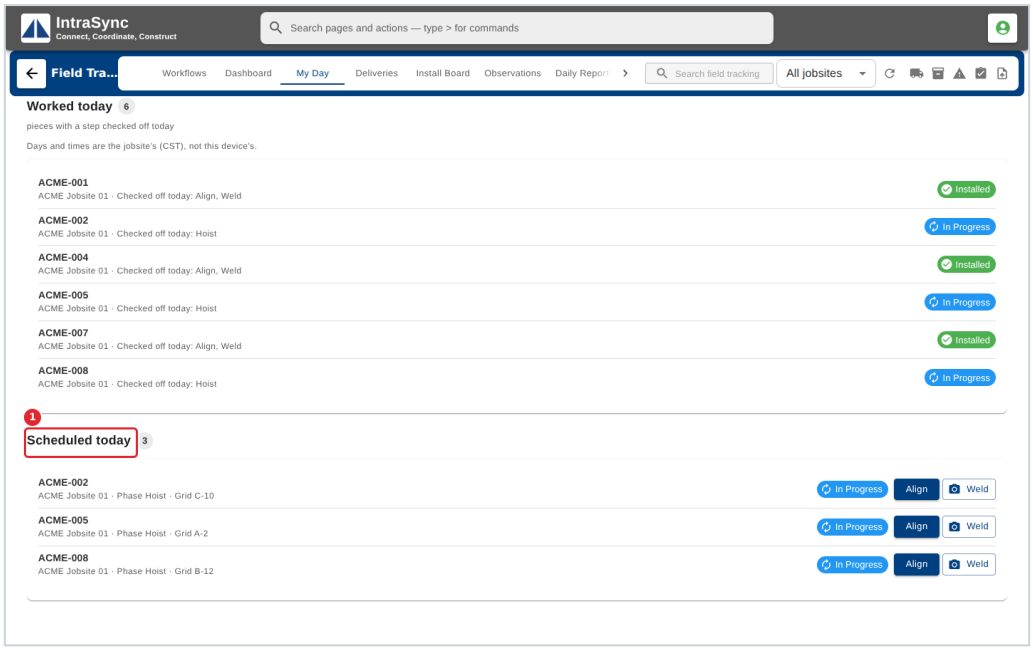
This is shown in the Field Tracking video at 0:06.

3. Check off today's install steps from My Day

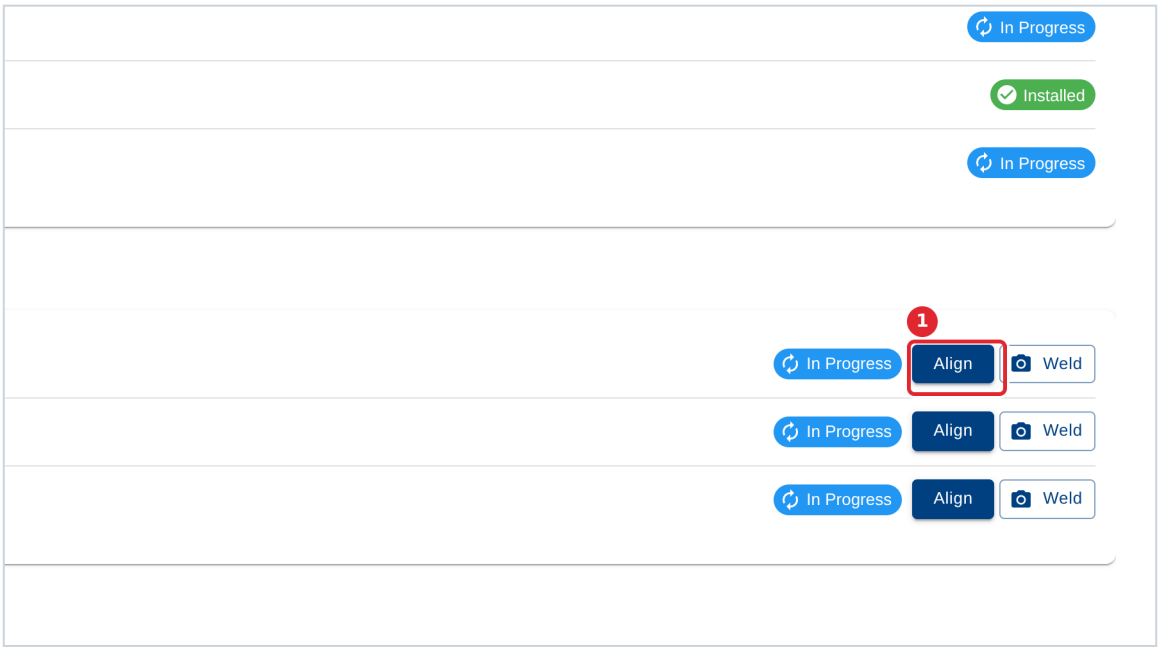
Give the crew one list of what to install today and a quick way to record each step as it is done.

Before you start:

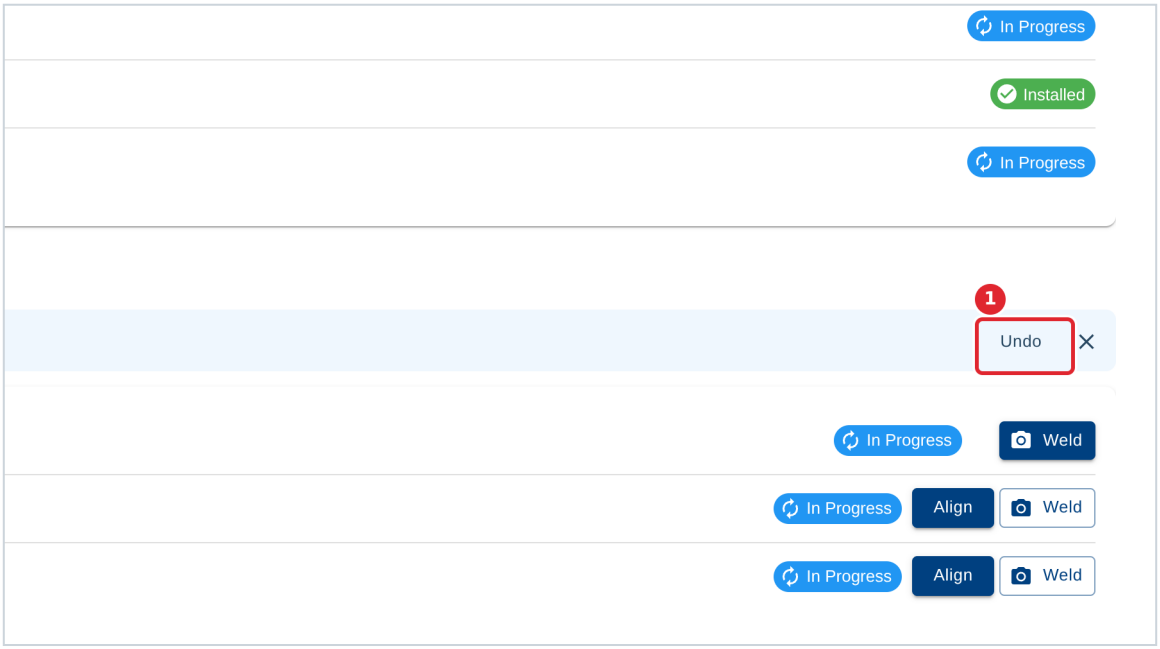
– A piece appears under Scheduled today when its projected install date is today.



Step 1. Select My Day to see the pieces scheduled to install today. Each piece shows its jobsite, current phase and status.



Step 2. Select the next phase on a piece to check it off as the crew completes it.



Step 3. A banner confirms the check-off. Select Undo straight away if it was the wrong piece or phase.

Tips:

- A phase marked with a camera asks for a photo: attach one with Upload Document / Photo.
- If your company requires a location fix for check-off, the device must share its location, or the check-off is refused with a message saying so.

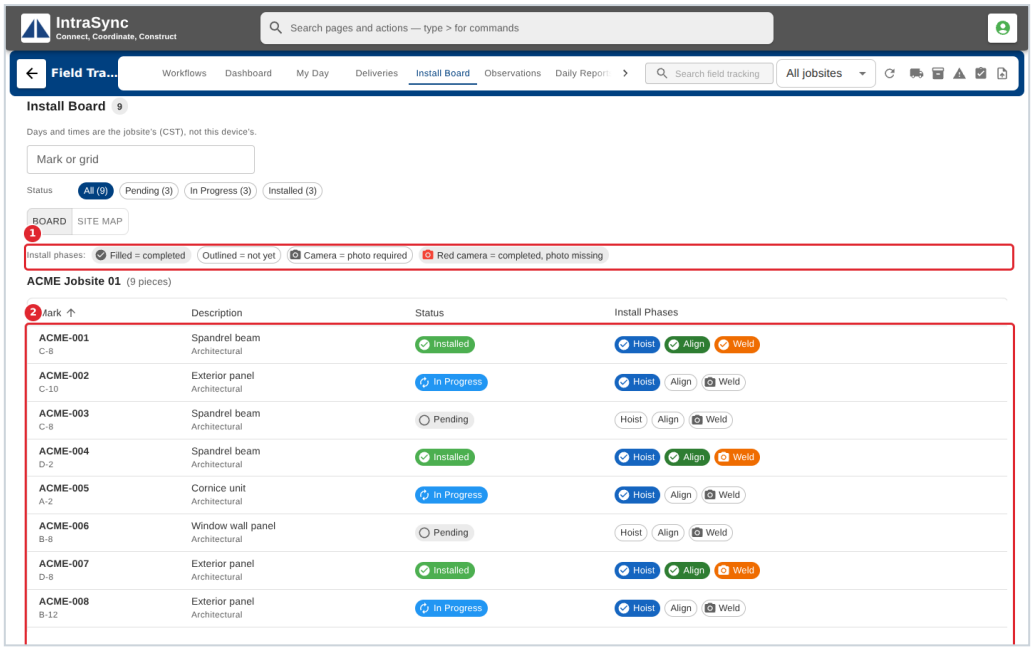
This is shown in the Field Tracking video at 0:16.

4. Check off install phases on the Install Board

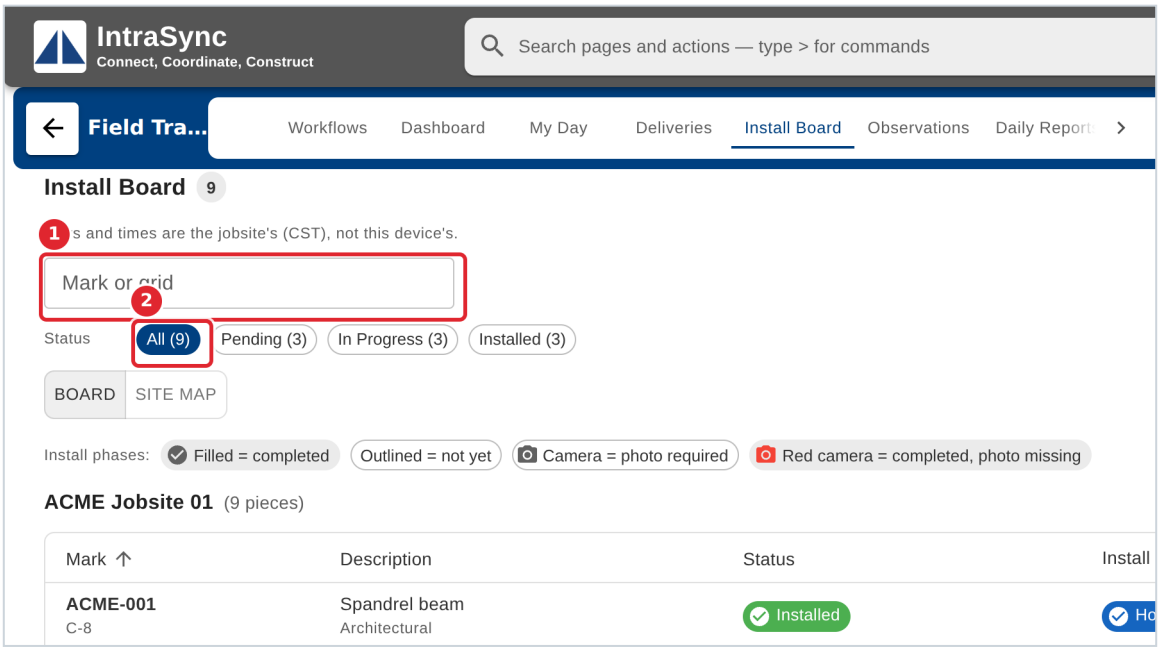
Track every piece through its install sequence, jobsite by jobsite.

Before you start:

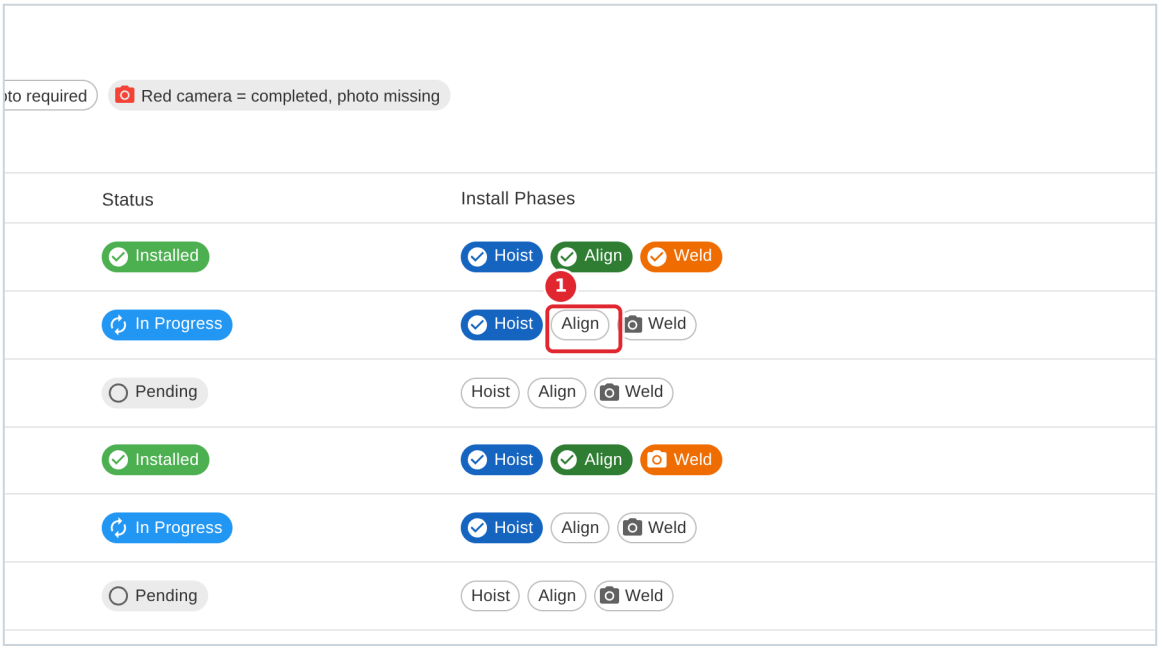
– Each piece's phases come from its phase set, set up in Manage > Setup > Phase Sets.



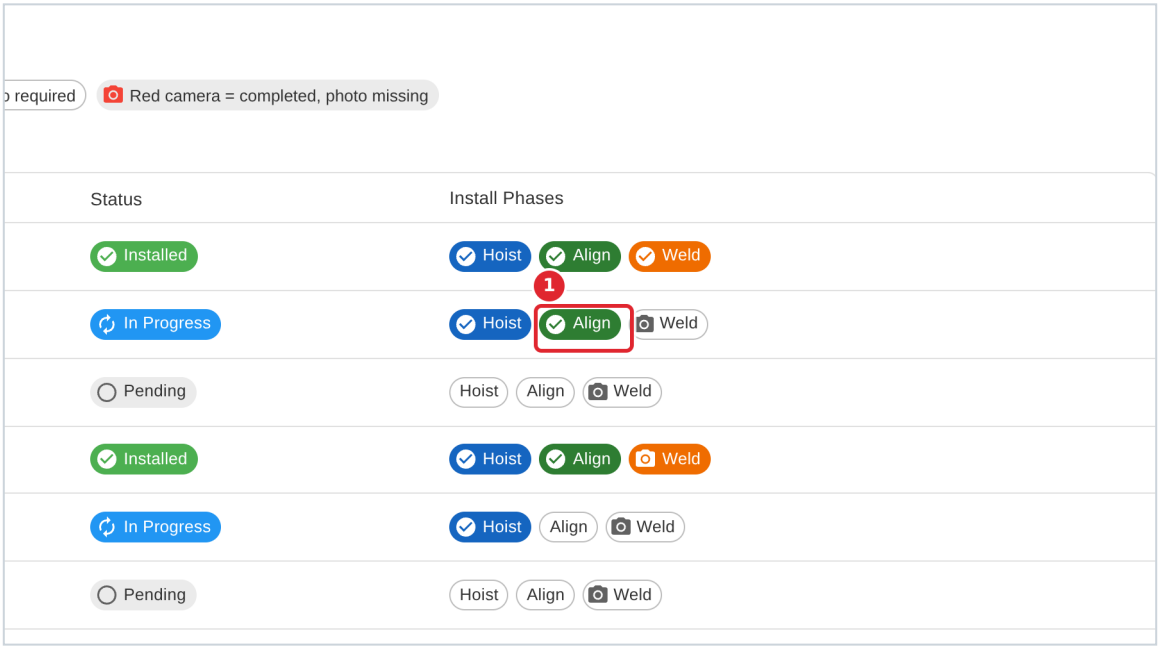
Step 1. Select Install Board. Pieces are grouped by jobsite, and each row shows its install phases as chips: filled is completed, outlined is not yet.



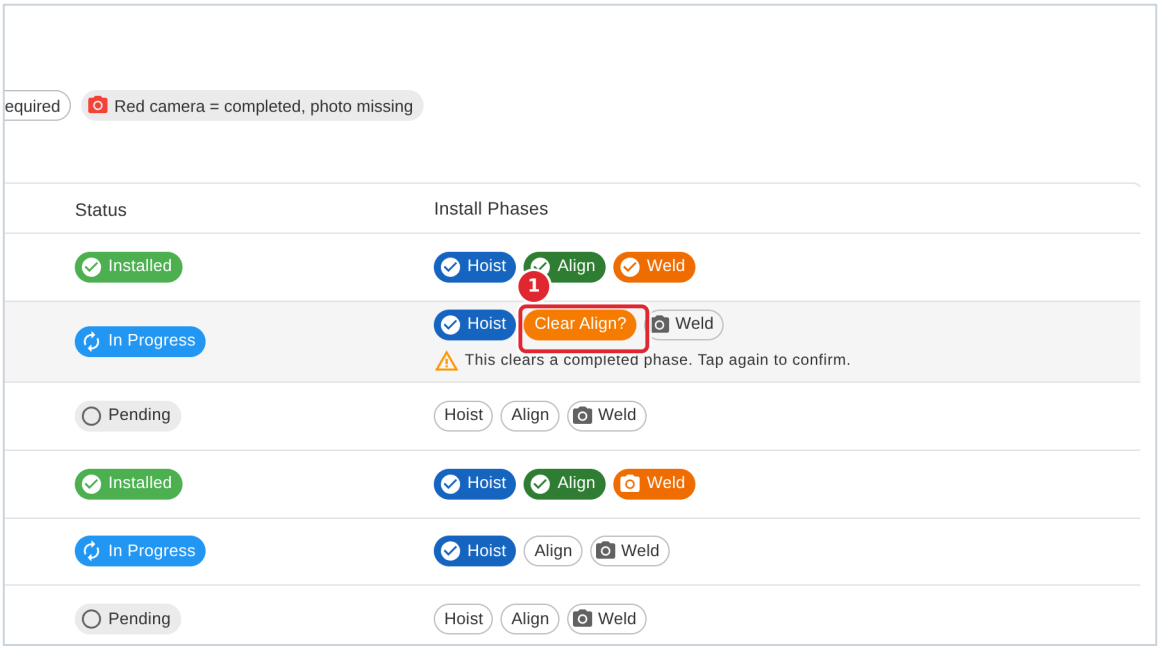
Step 2. Type a piece mark or a grid location to find a piece, or use the Status chips to show only pending, in-progress or installed pieces.



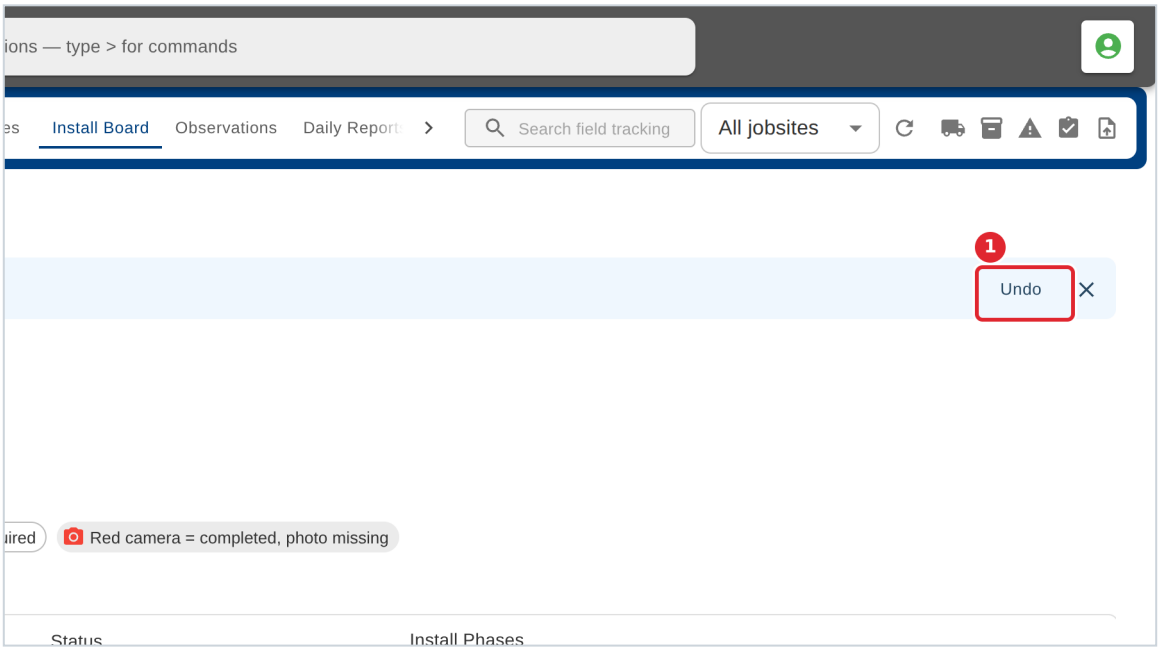
Step 3. Select an outlined phase chip to check that phase off for the piece.



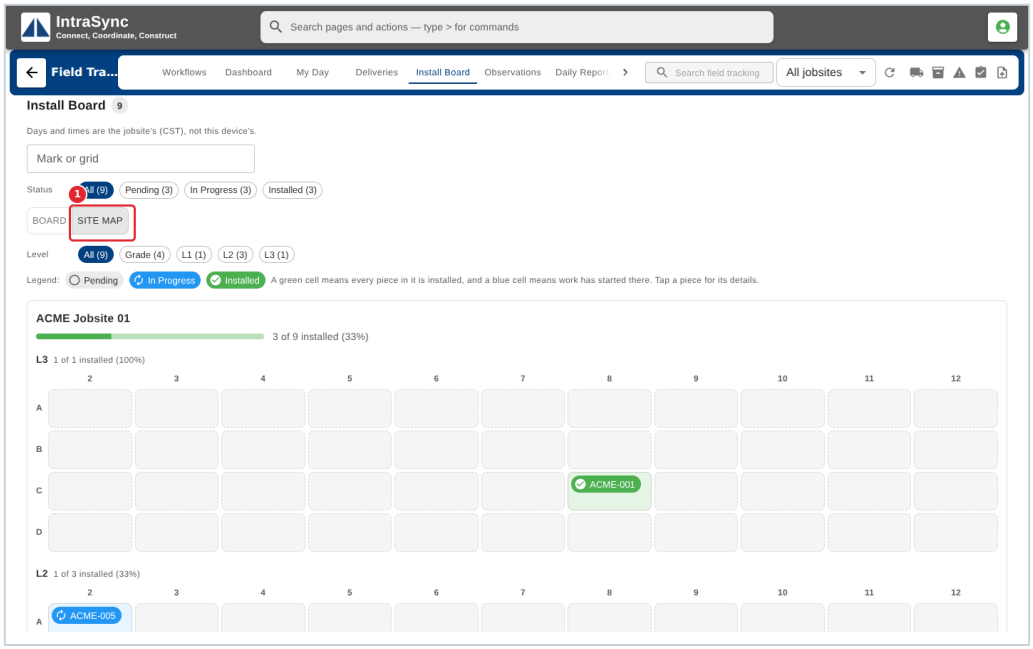
Step 4. The chip fills in, and the piece's status follows its phases.



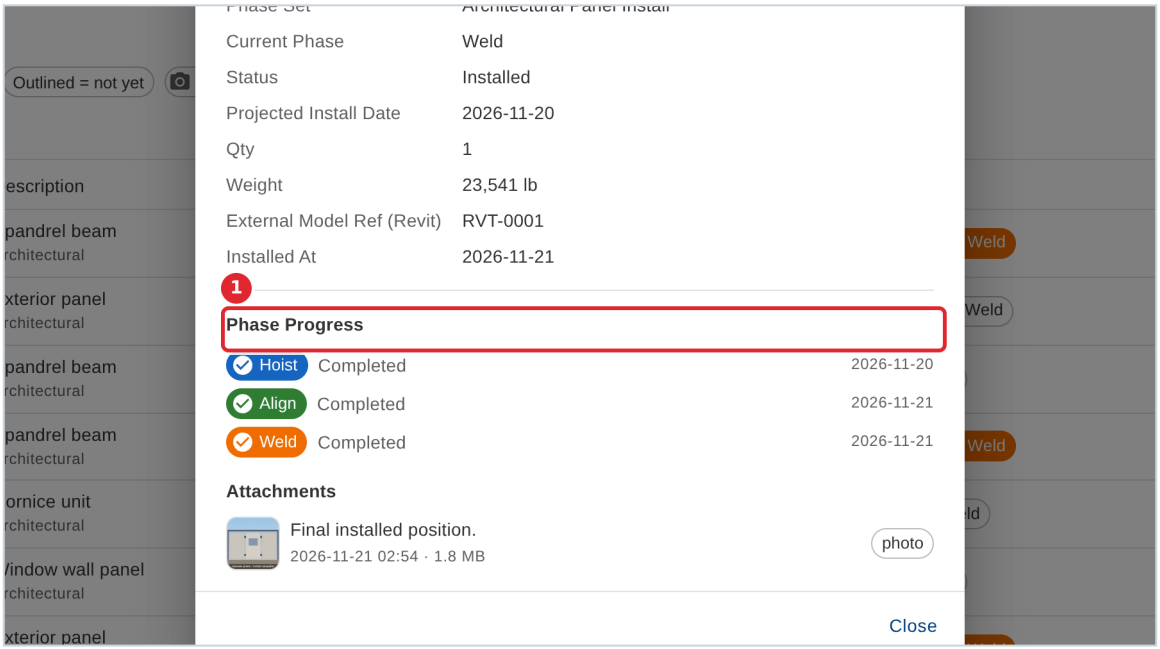
Step 5. To clear a completed phase, select it once: the chip asks to confirm and says which later steps would clear with it. Select it again to clear.



Step 6. A banner names what was cleared. Select Undo to put it back.



Step 7. Select Site map to see the jobsite's grid: a green cell is fully installed, a blue cell has work started. Select a piece for its details.



Step 8. Select a piece's row to open its details: its phase set, current phase, install date and each phase's progress.

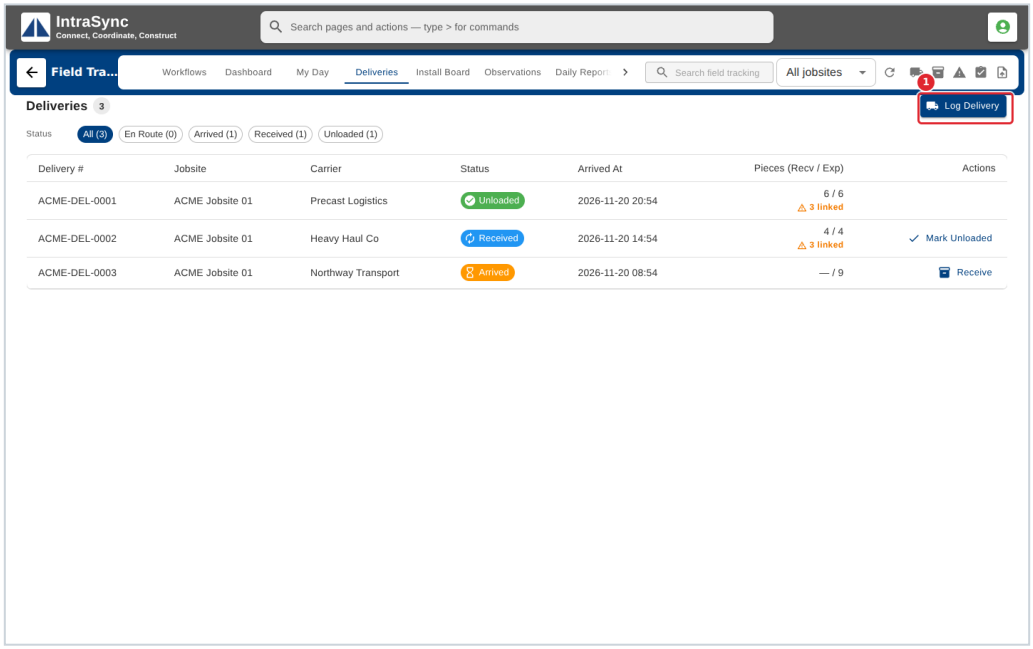
Tips:

- Clearing a phase also clears the steps after it. The confirmation names them before anything changes.
- A red camera on a chip means the phase was completed without the photo it asks for.
- Select the Mark, Description or Status heading to sort the pieces within each jobsite.

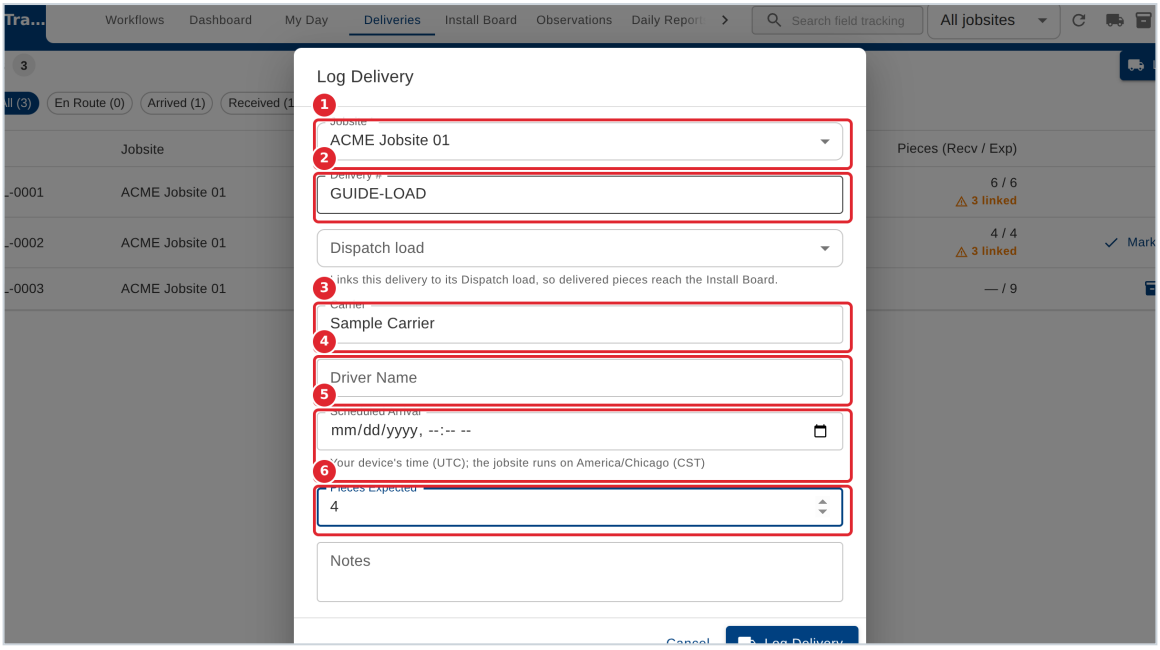
This is shown in the Field Tracking video at 0:24.

5. Log a delivery that is on its way

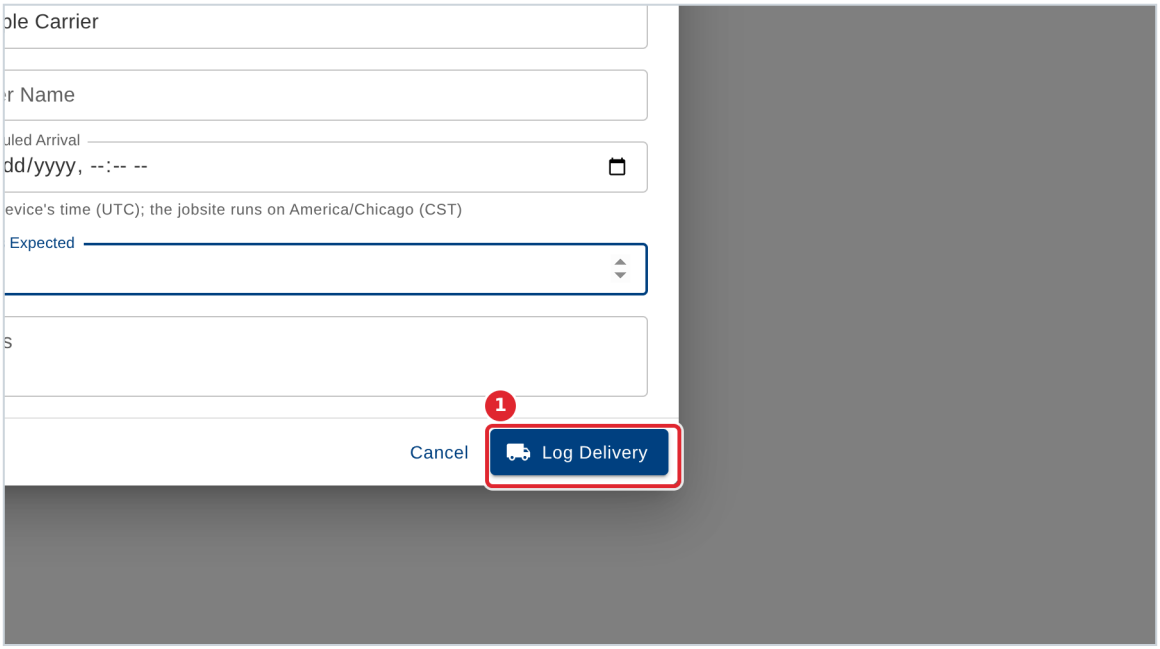
Record a load heading to a jobsite, so the site knows what is coming and when.



Step 1. Select Deliveries, then Log Delivery.



Step 2. Choose the jobsite, then enter the delivery number, carrier, driver, scheduled arrival and the number of pieces expected. Only the jobsite is required.



Step 3. Select Log Delivery. The load appears in the list as en route.

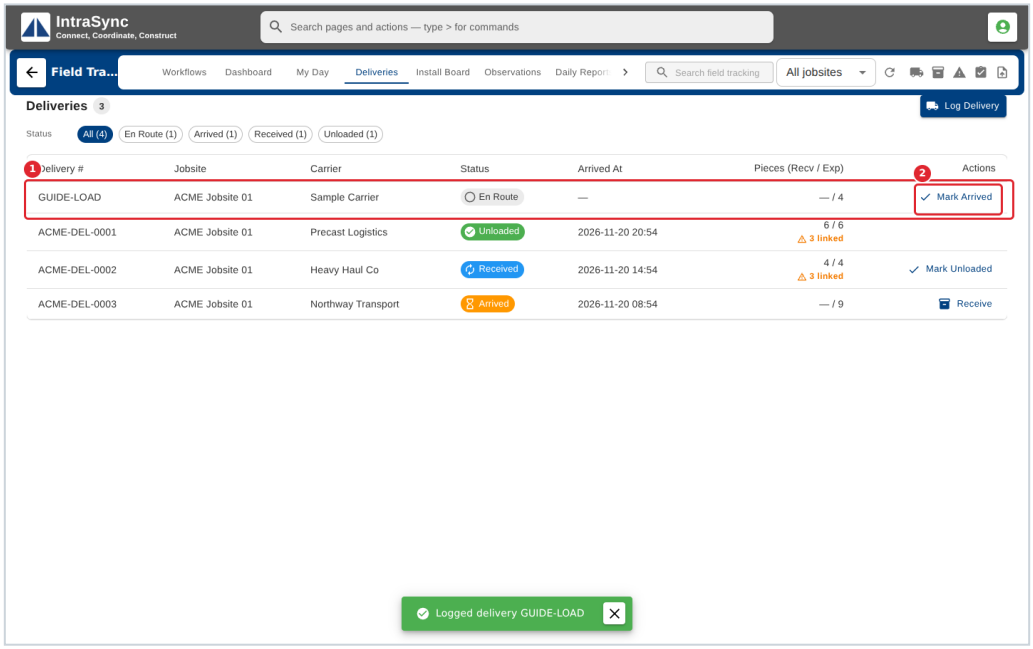
Tips:

- Log Delivery stays unavailable until a jobsite is chosen.
- Pieces expected must be a number, zero or more.
- When the load comes from Dispatch, link it with Dispatch load so the delivered pieces reach the Install Board.

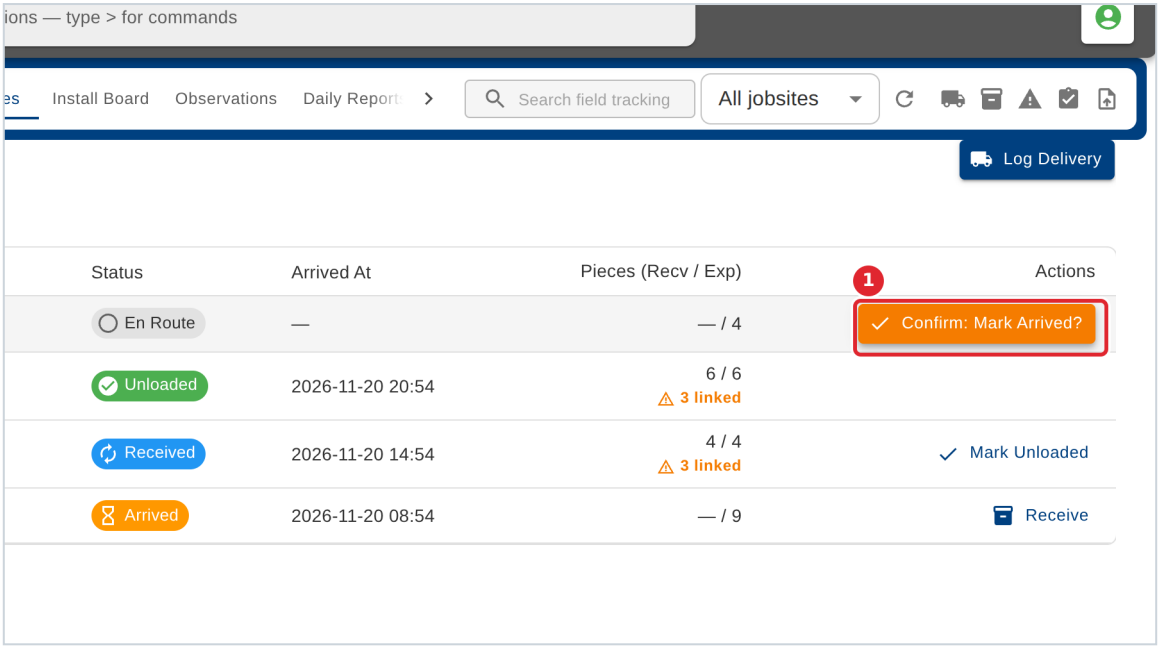
This is shown in the Field Tracking video at 2:20.

6. Receive a delivery and count the pieces in

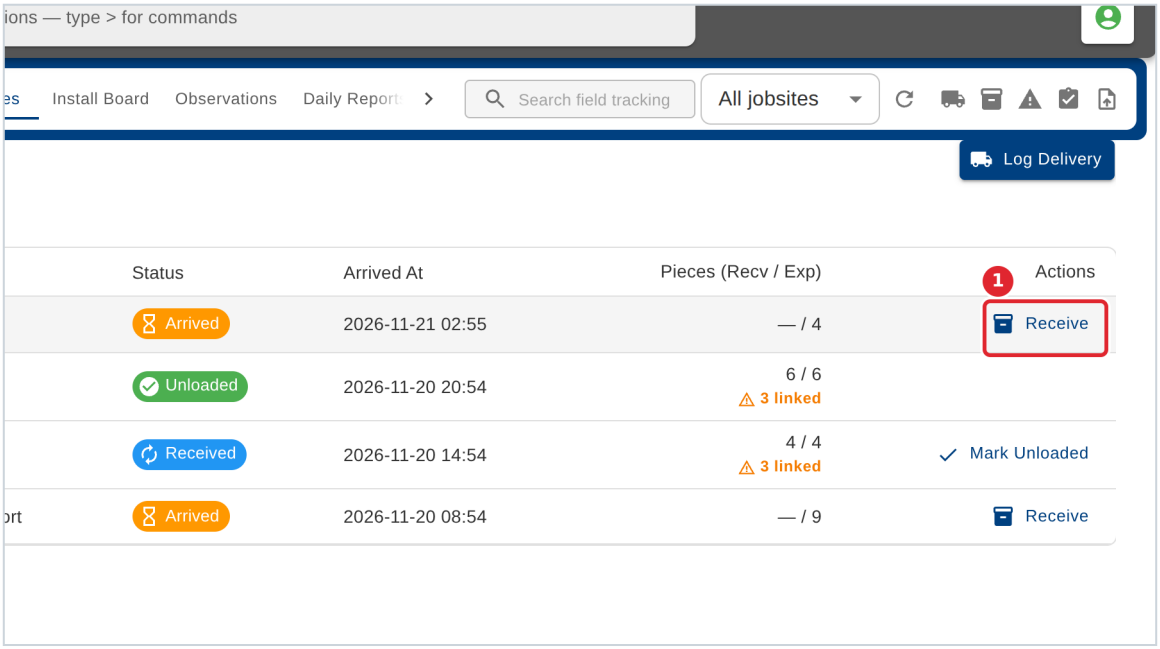
Confirm what actually arrived against what was expected, and link the pieces to the load.



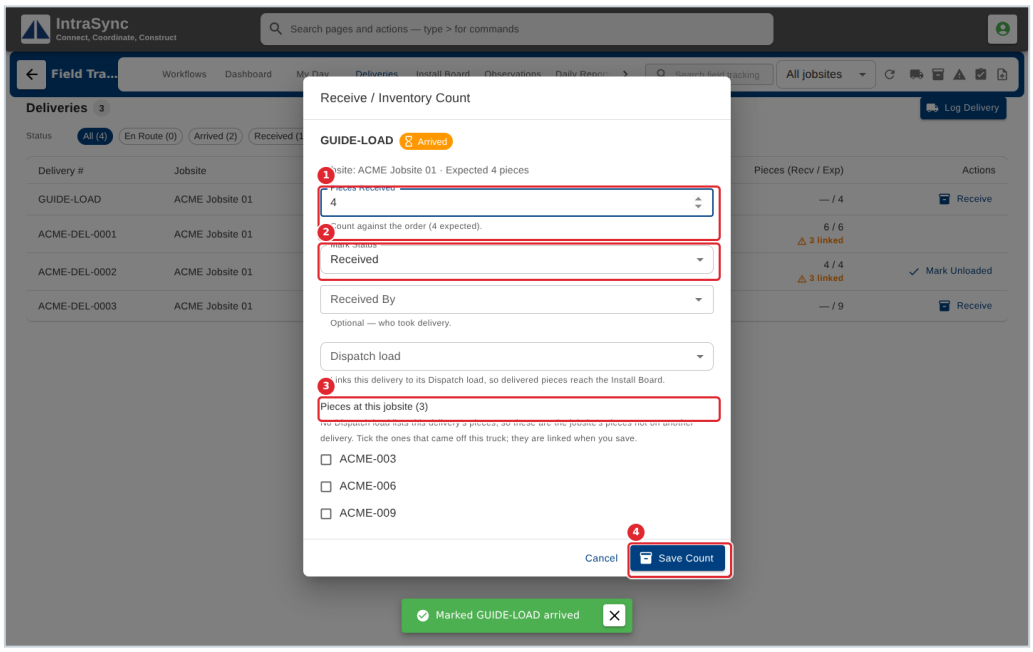
Step 1. When the truck reaches the site, select Mark Arrived on its row.



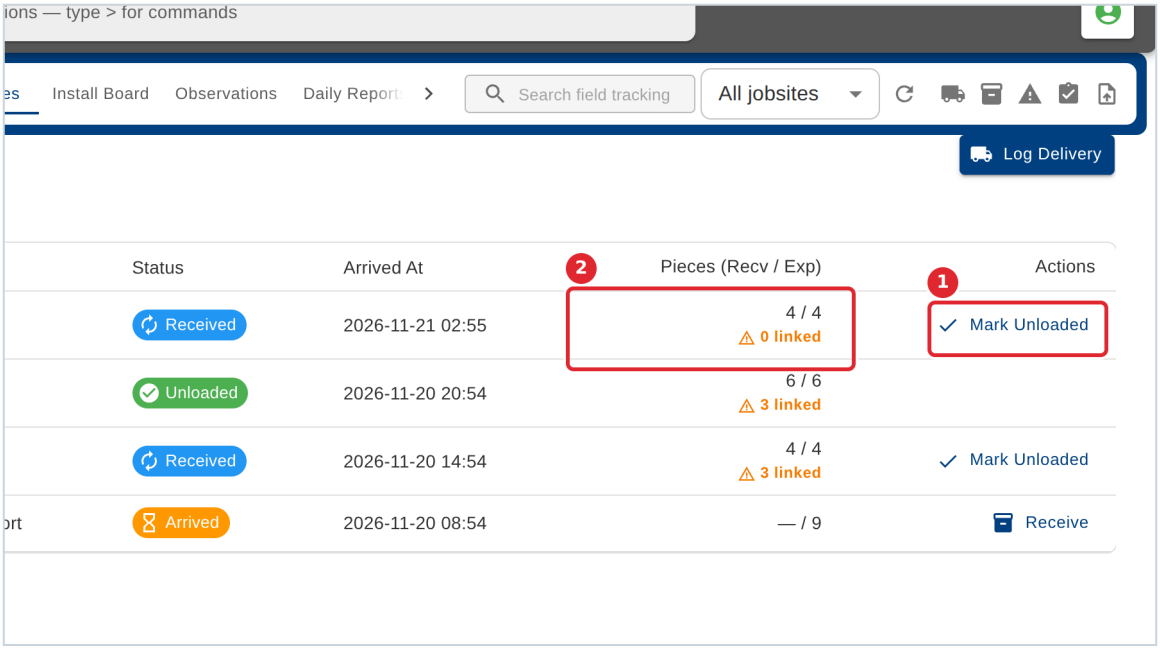
Step 2. Select it again to confirm. The load is now arrived.



Step 3. Select Receive to count the load in.



Step 4. Enter the pieces received, choose the status to mark, and tick the pieces that came on this load. Then select Save Count.



Step 5. Once the load is off the truck, select Mark Unloaded and confirm. The Pieces column compares what was received with what was expected.

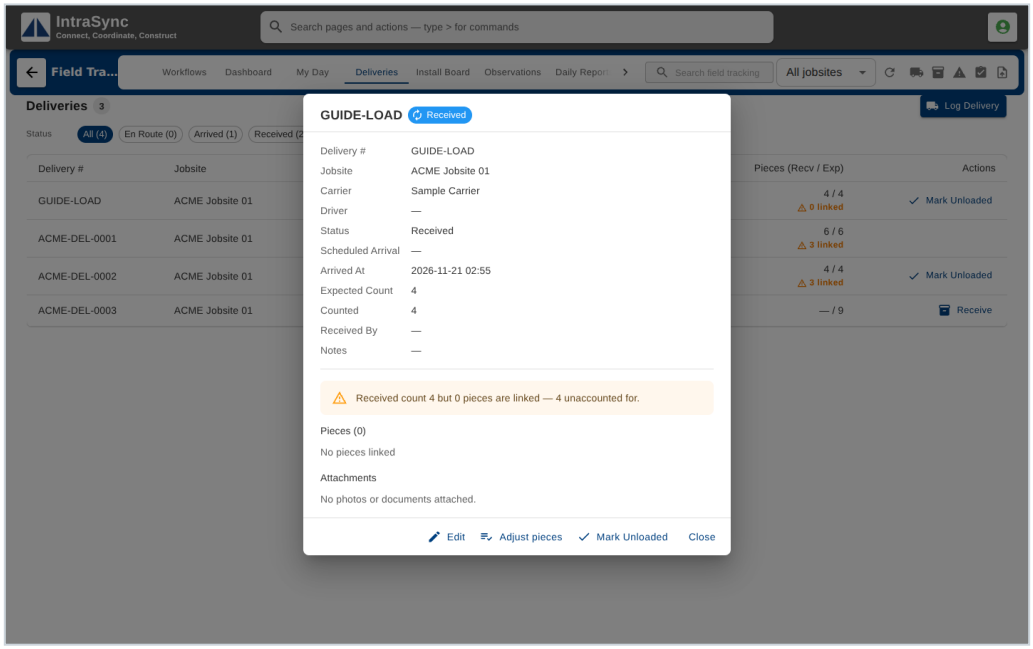
Tips:

- Mark Arrived and Mark Unloaded each need a second tap to confirm, so a stray tap changes nothing.
- A note under the count, such as short or over, means the pieces received do not match what was expected or linked.
- The Receive / Inventory Count button in the header opens the same count, with a delivery picker.

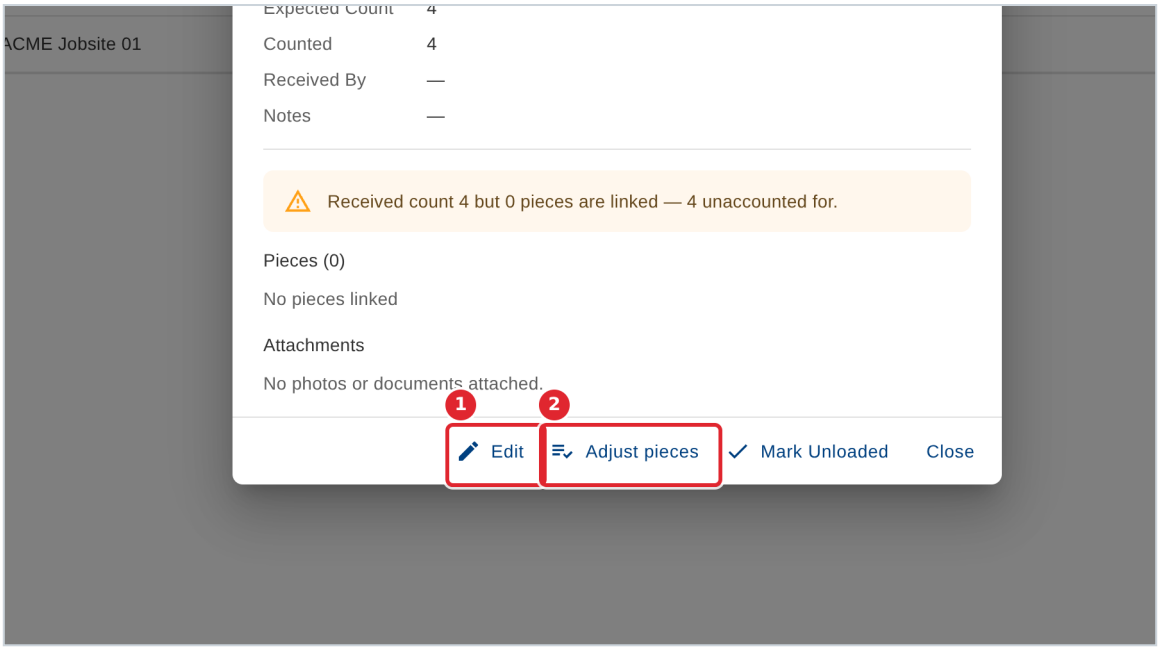
This is shown in the Field Tracking video at 2:27.

7. Open a delivery's full record

See everything recorded about one load, and correct it when something was entered wrong.



Step 1. Select a delivery's row to open its full record: carrier, driver, arrival, counts, the linked pieces and any attachments.



Step 2. Select Edit to correct the load's details, or Adjust pieces to change the count or the linked pieces after it was received.

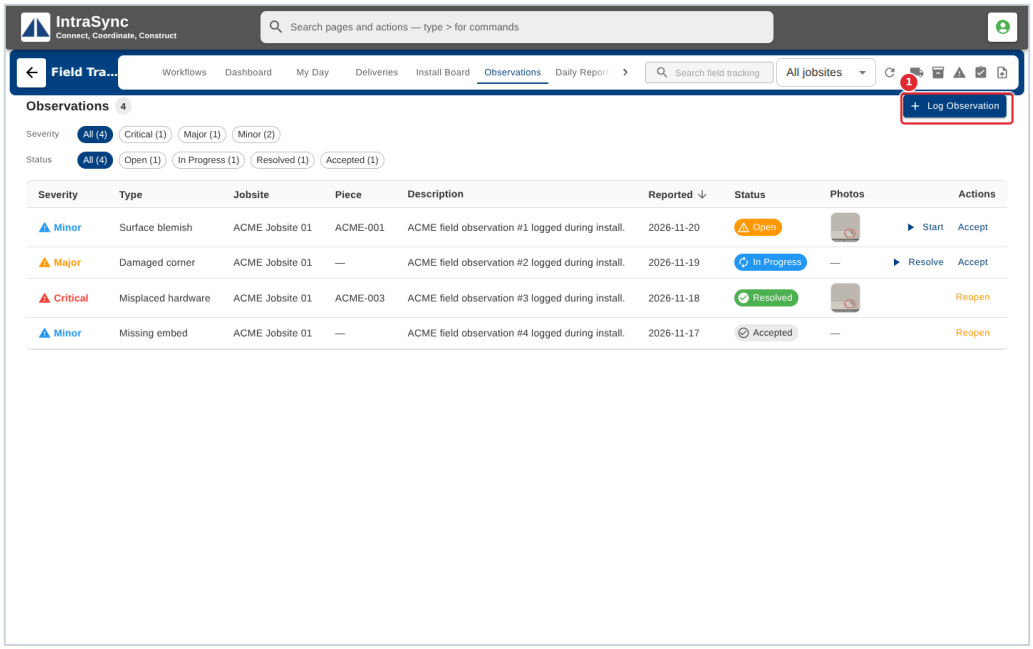
Tips:

- Once a load is received, its carrier, driver, scheduled arrival and expected count are locked. Notes can still be edited.
- Only a delivery still en route, with no linked pieces or attachments, can be deleted.

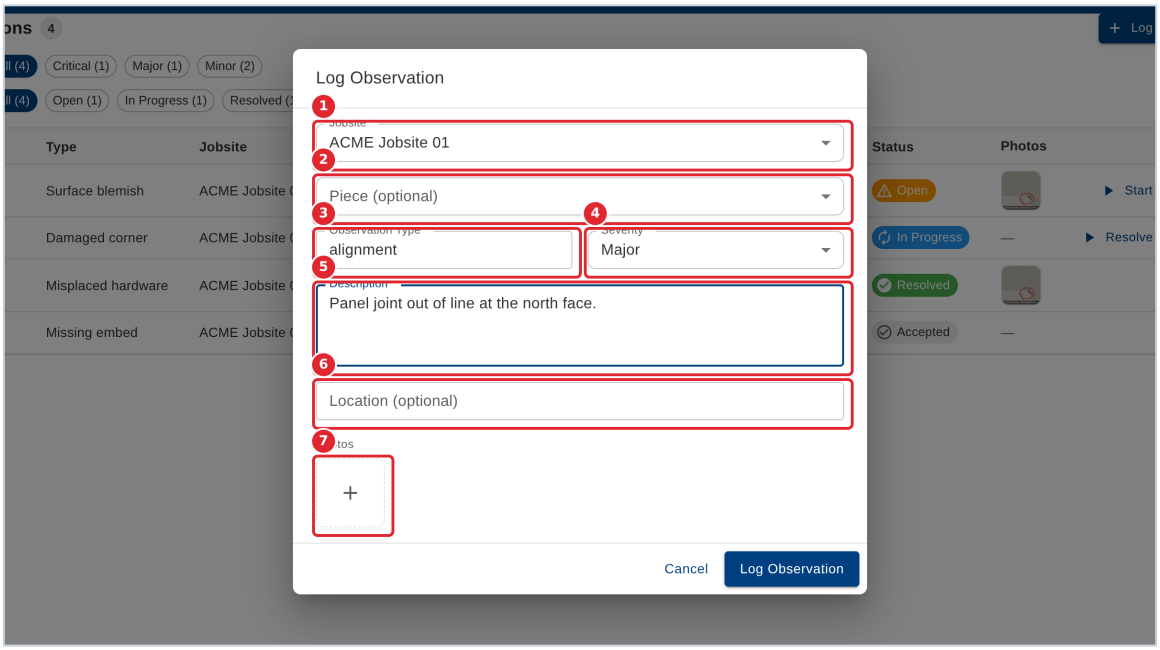
This is shown in the Field Tracking video at 1:17.

8. Log a field observation

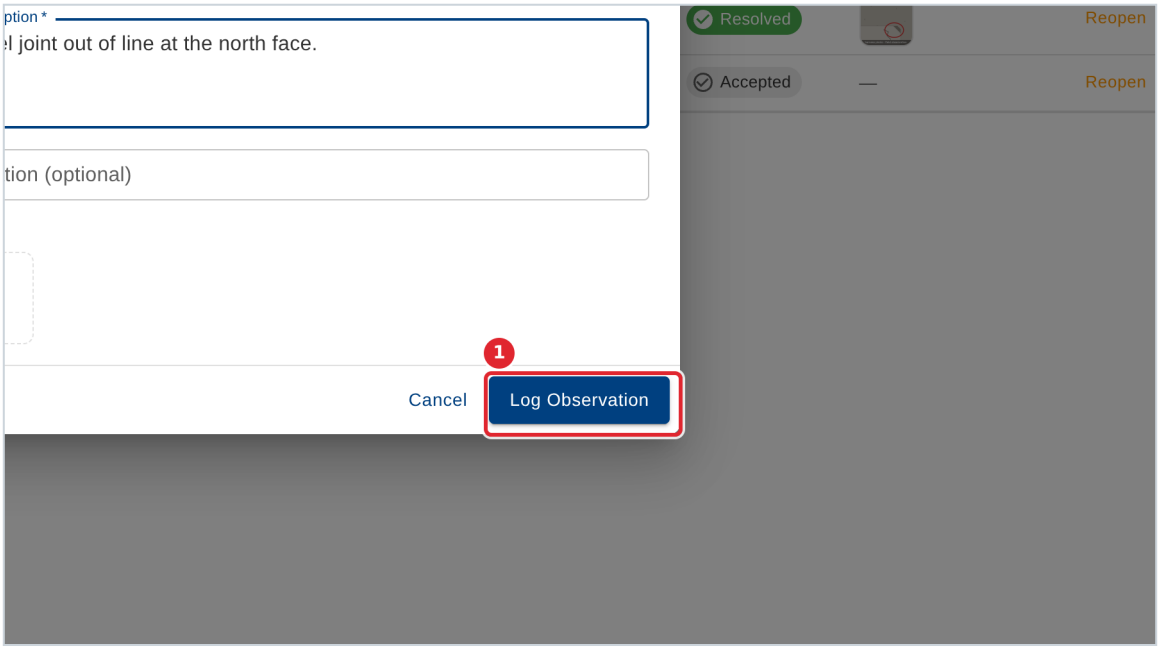
Record damage, misalignment or any quality problem found on site, so it is tracked until it is fixed.



Step 1. Select Observations, then Log Observation. The quick-entry button in the header opens the same form.



Step 2. Choose the jobsite and, if it concerns one piece, the piece. Enter the observation type, pick a severity and describe what was found. Add a location and photos if you have them.



Step 3. Select Log Observation.

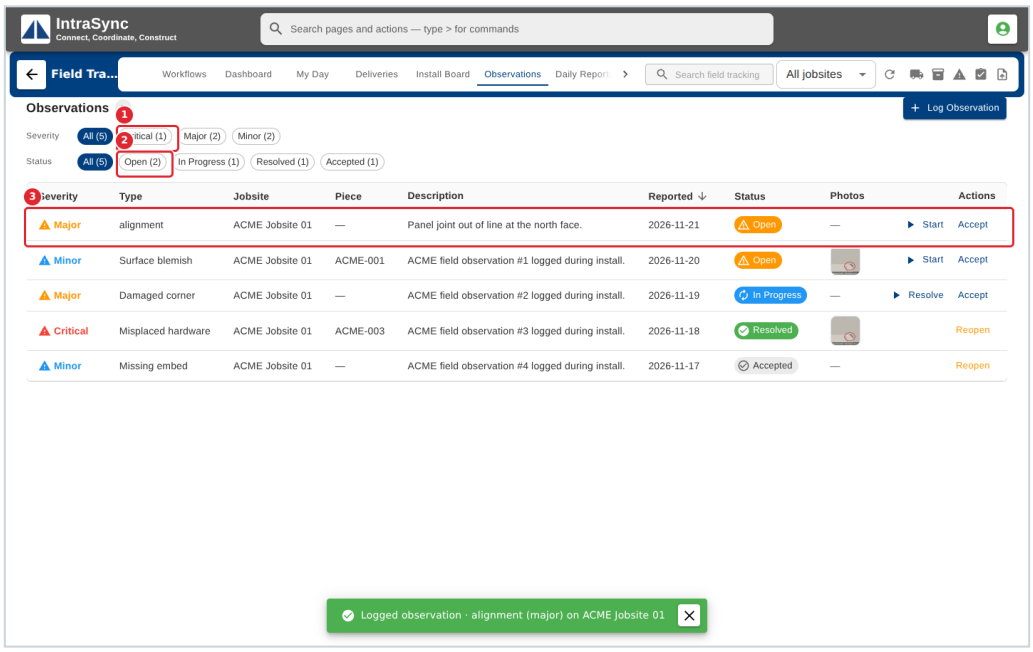
Tips:

- Jobsite, observation type, severity and description are required.
- Choose the jobsite first: the piece list shows only that jobsite's pieces.

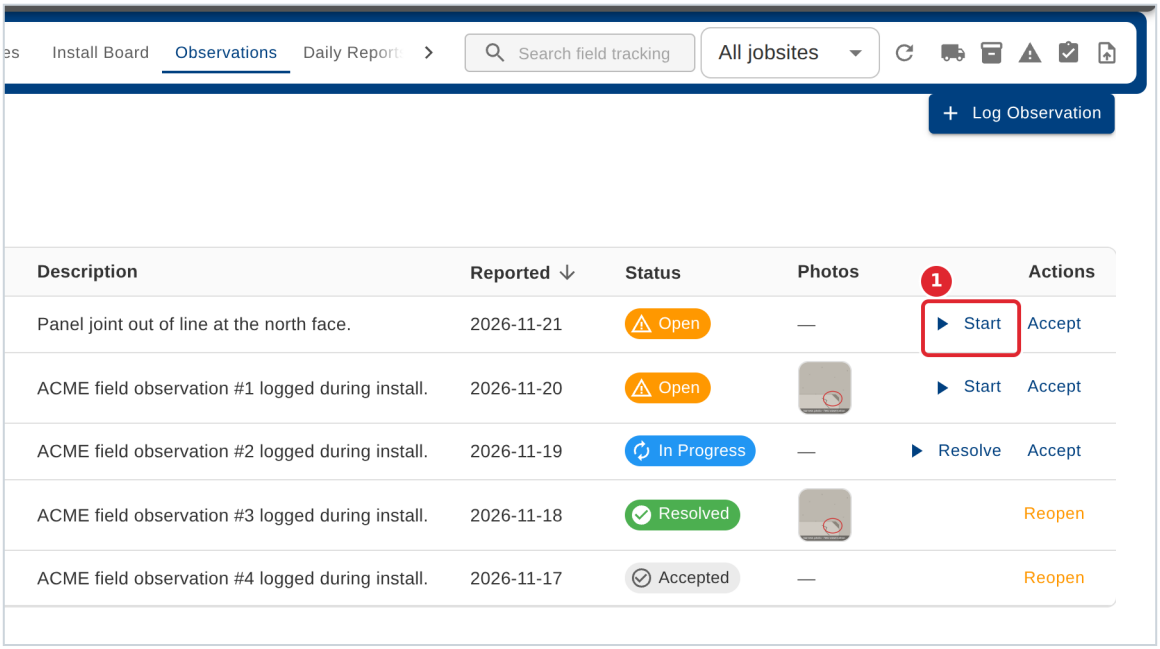
This is shown in the Field Tracking video at 2:34.

9. Work an observation through to resolved

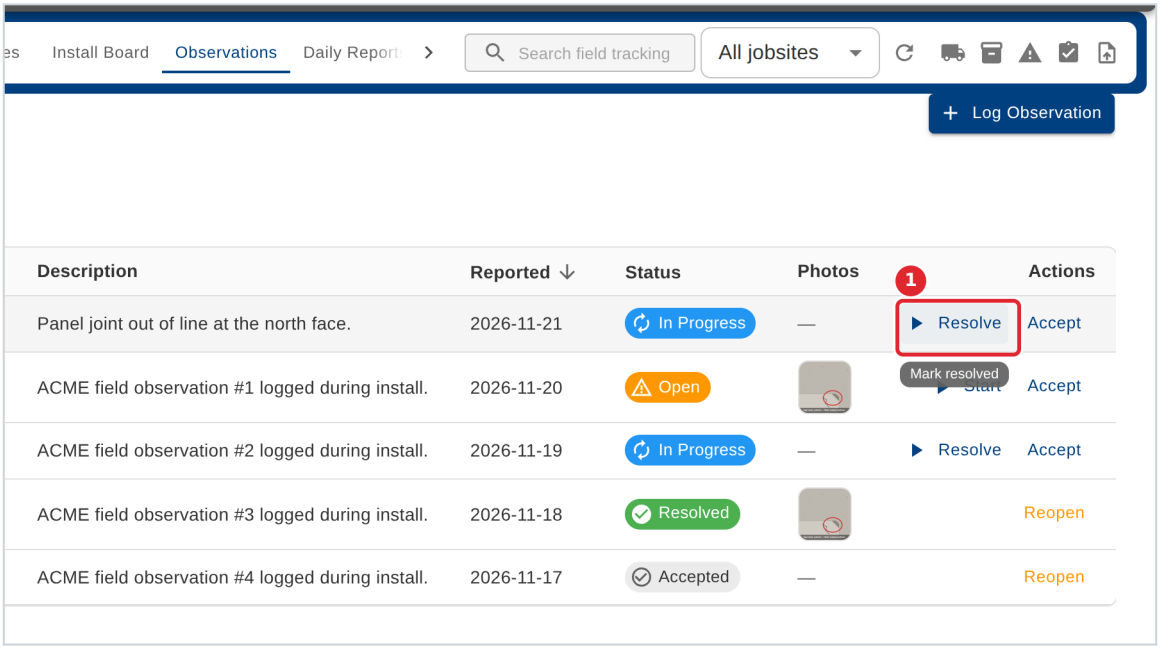
Show who is working on each issue, and close it out with a record of what was done.



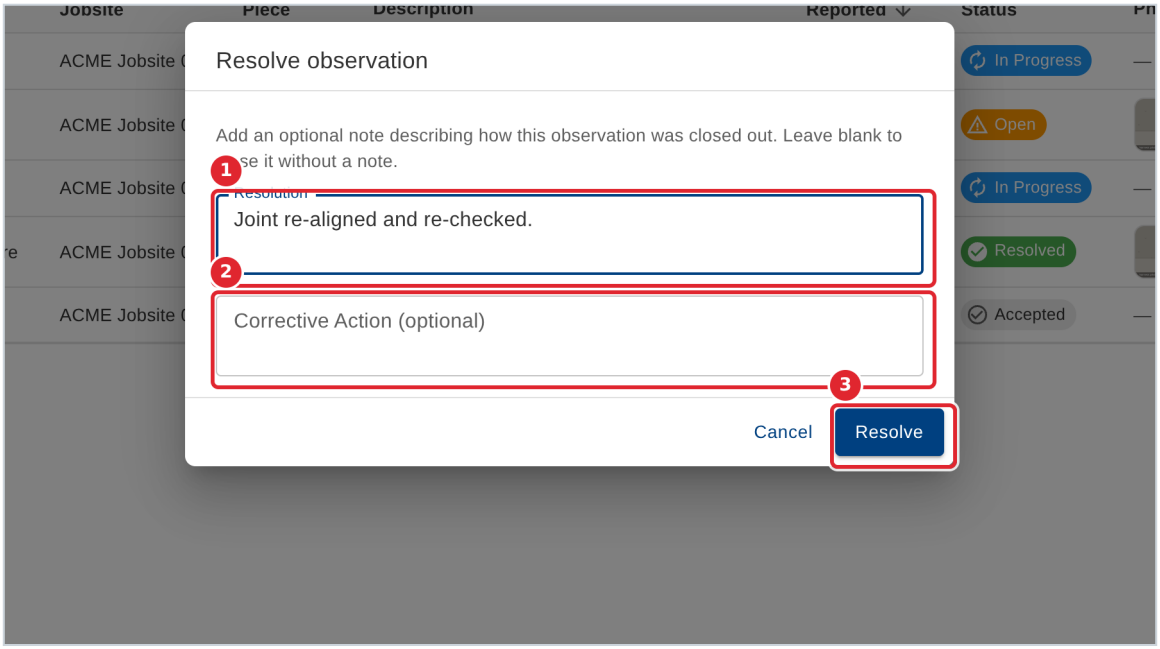
Step 1. Use the Severity and Status chips to narrow the list. A new observation starts as open.



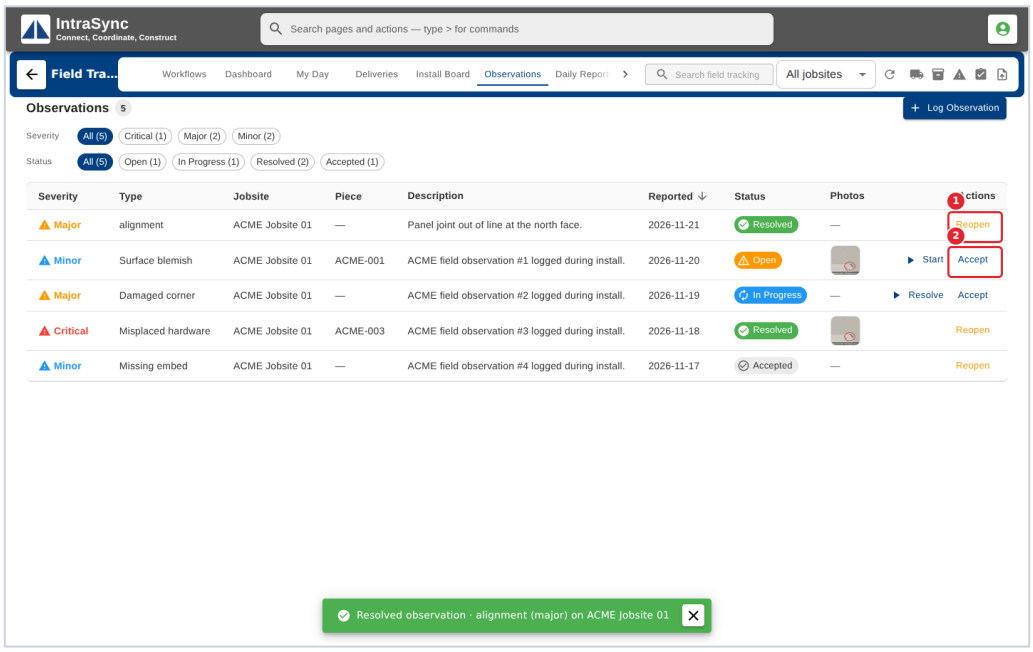
Step 2. Select Start when someone begins working on it.



Step 3. When the issue is fixed, select Resolve.



Step 4. Record the resolution and any corrective action, then select Resolve.



Step 5. A resolved observation shows Reopen, to bring it back if the problem returns. While an observation is open or in progress, Accept closes it as accepted rather than resolved. Select any row to see the observation's full record and photos.

Tips:

- Resolution and corrective action are optional, but they are what the next person reads.
- Resolve and Accept both ask for an optional note before they close the observation.
- A resolved or accepted observation can be reopened if the problem comes back.

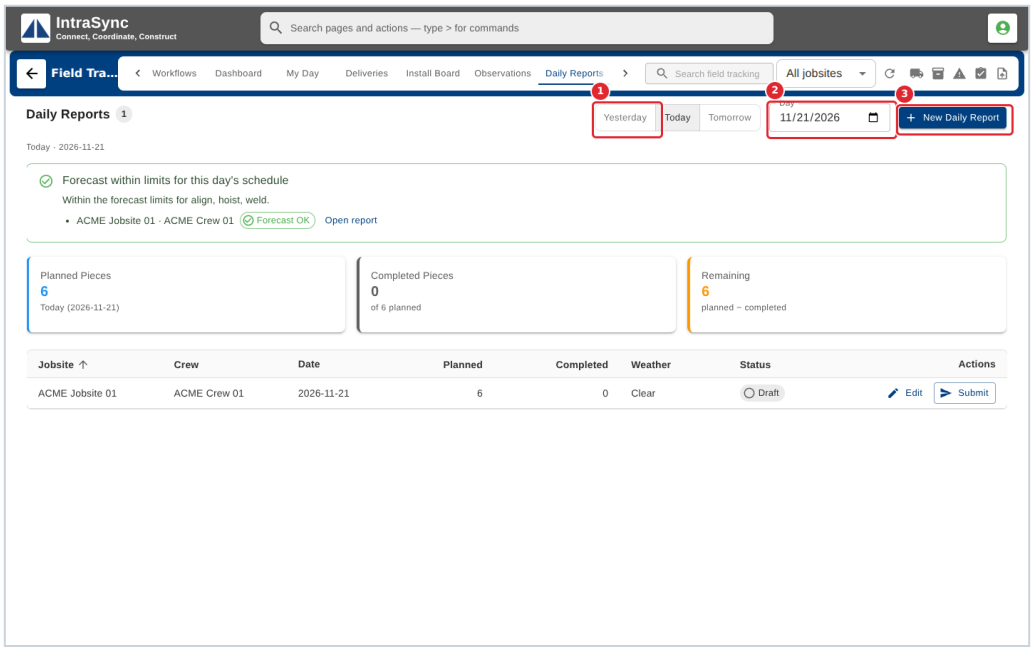
This is shown in the Field Tracking video at 0:28.

10. File and finalize a daily report

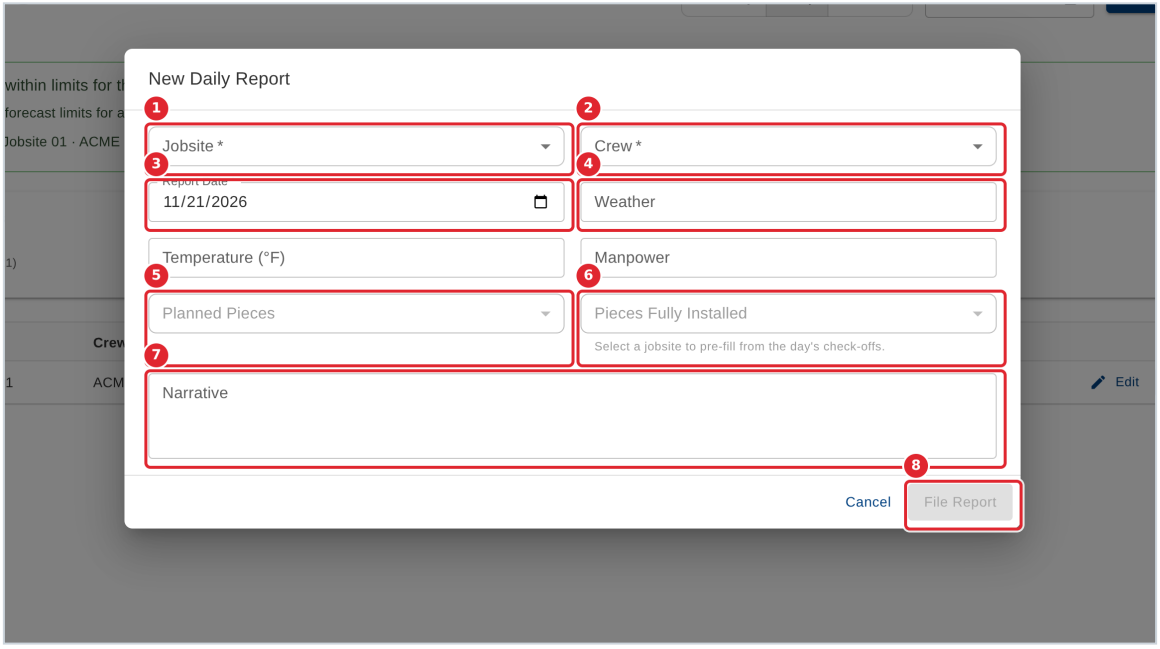
Record what each crew planned and completed each day, with weather and manpower, and lock it once it is reviewed.

Before you start:

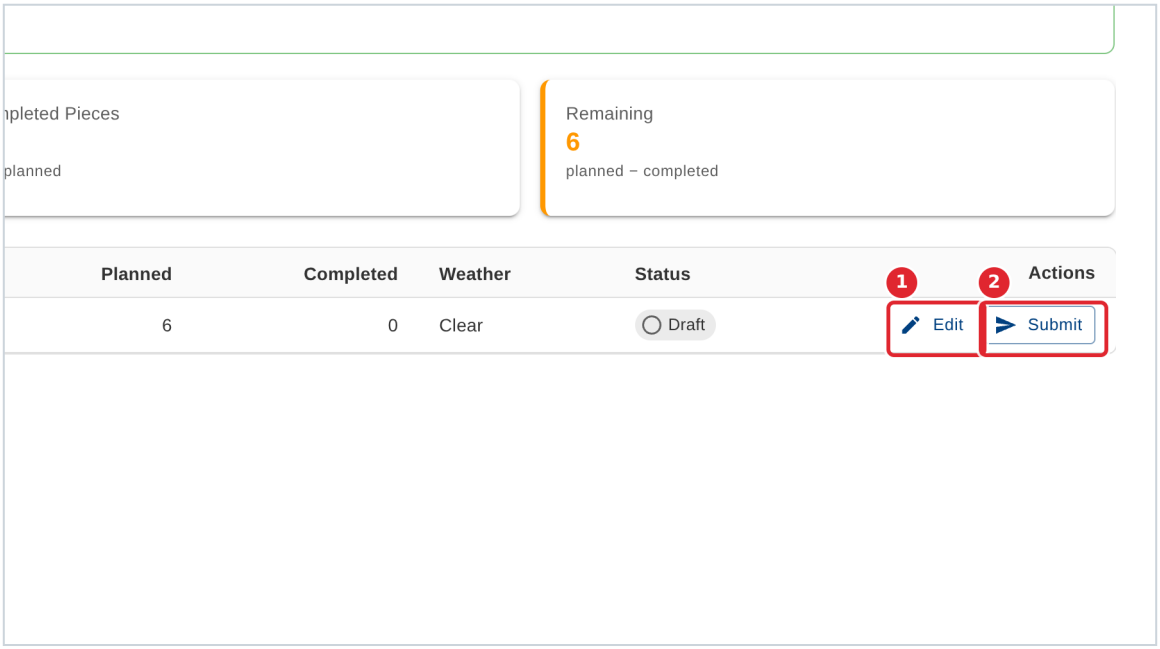
– There is one report per jobsite, crew and date.



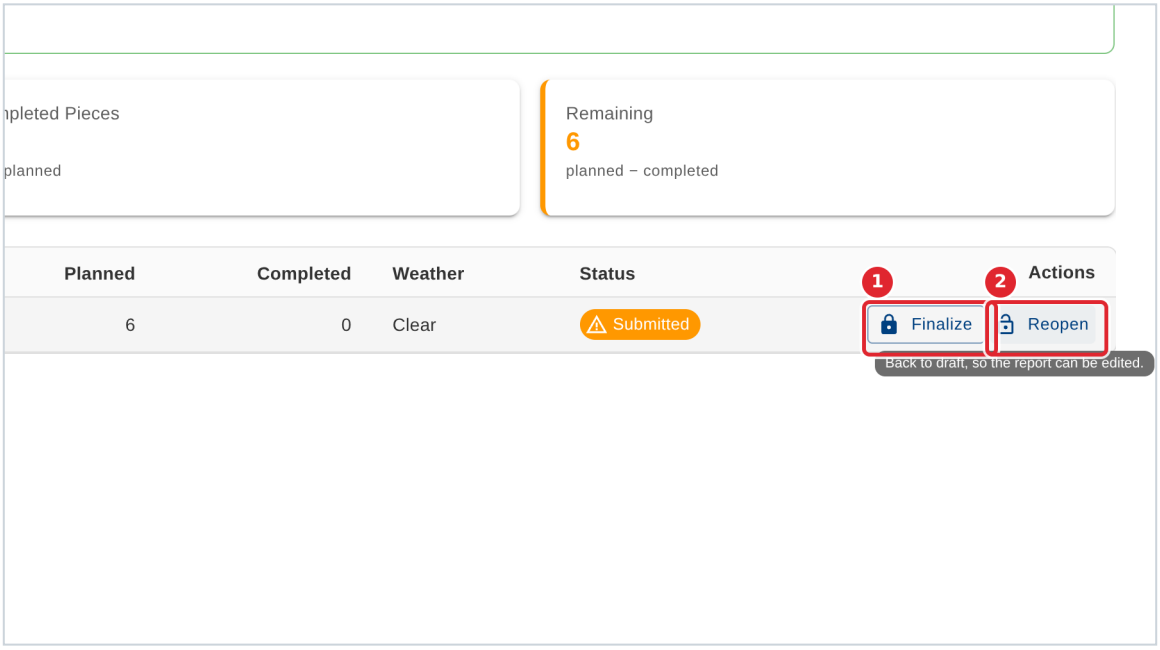
Step 1. Select Daily Reports. Pick Yesterday, Today or Tomorrow, or any date, to see that day's planned and completed pieces, the forecast check and the reports filed.



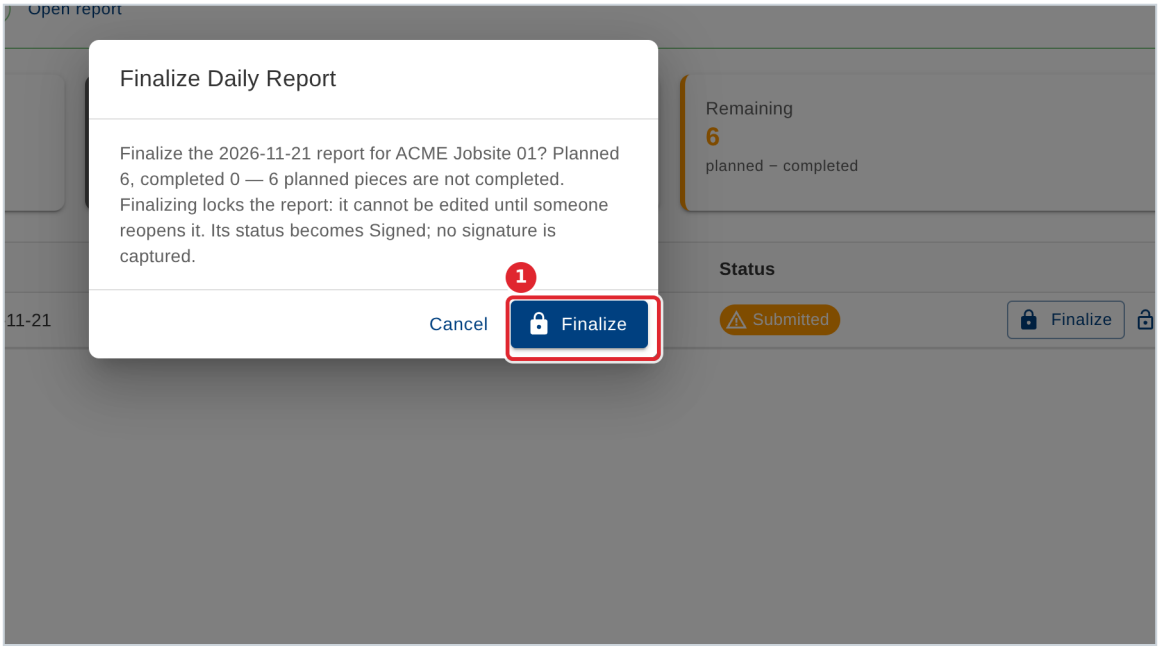
Step 2. Select New Daily Report. Choose the jobsite, crew and report date, then record weather, temperature, manpower, the planned pieces, the pieces fully installed and a narrative. Select File Report.



Step 3. A filed report starts as a draft. Select Edit to change it, or Submit when it is ready for review.



Step 4. A submitted report can be finalized, or reopened to go back to draft.



Step 5. Finalize asks you to confirm the counts. Finalizing locks the report and marks it signed.

– Step 6. Select a report's row to read it in full. Select Print for a paper copy.

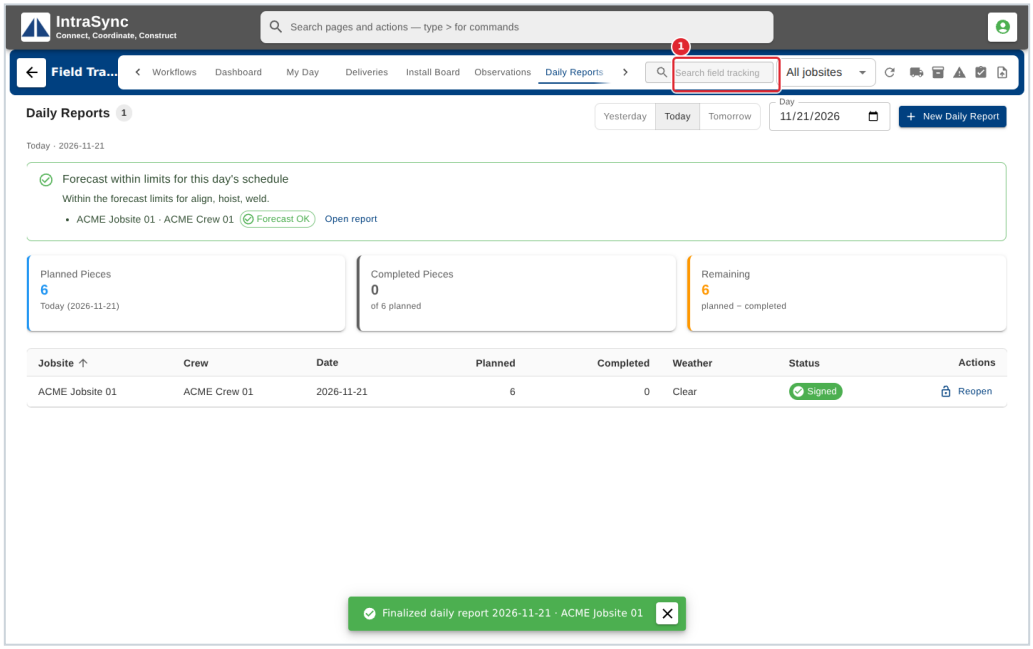
Tips:

– Jobsite, crew and report date are required.
– Temperature must be within the range the form states, and manpower is a whole number of people.
– Reopening a finalized report takes it back to submitted. Reopen it again to edit it.
– A weather warning on the day means the forecast breaks a limit set in Manage > Setup > Daily Report & Forecast. Select Proceed anyway to go ahead.

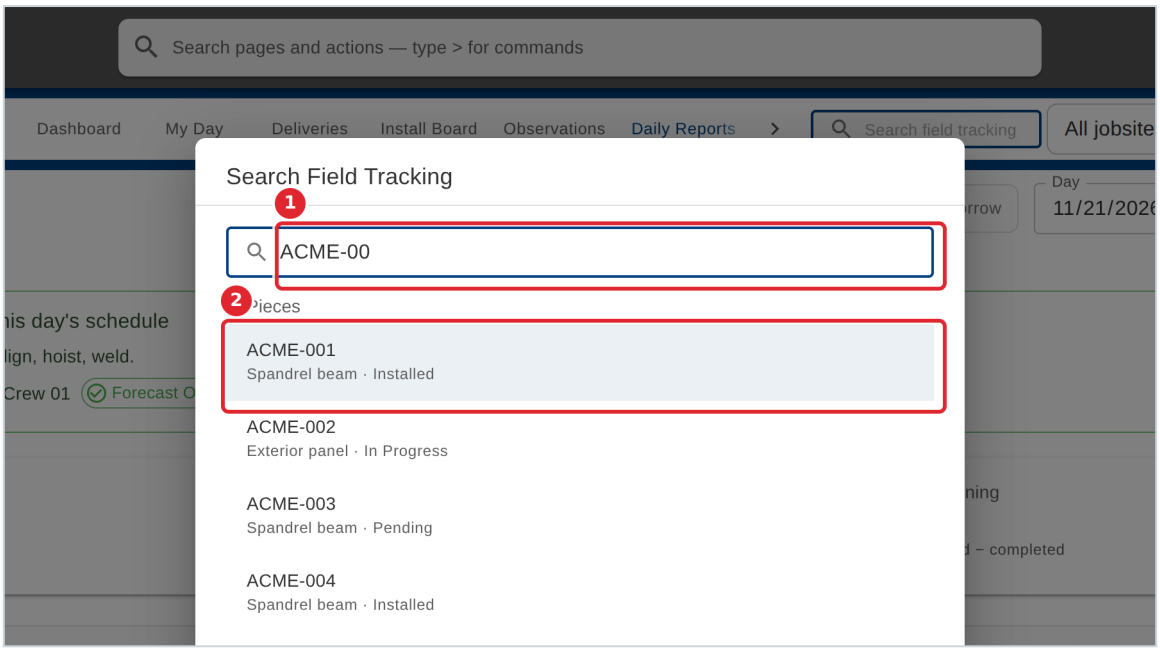
This is shown in the Field Tracking video at 0:33.

11. Find any record with search

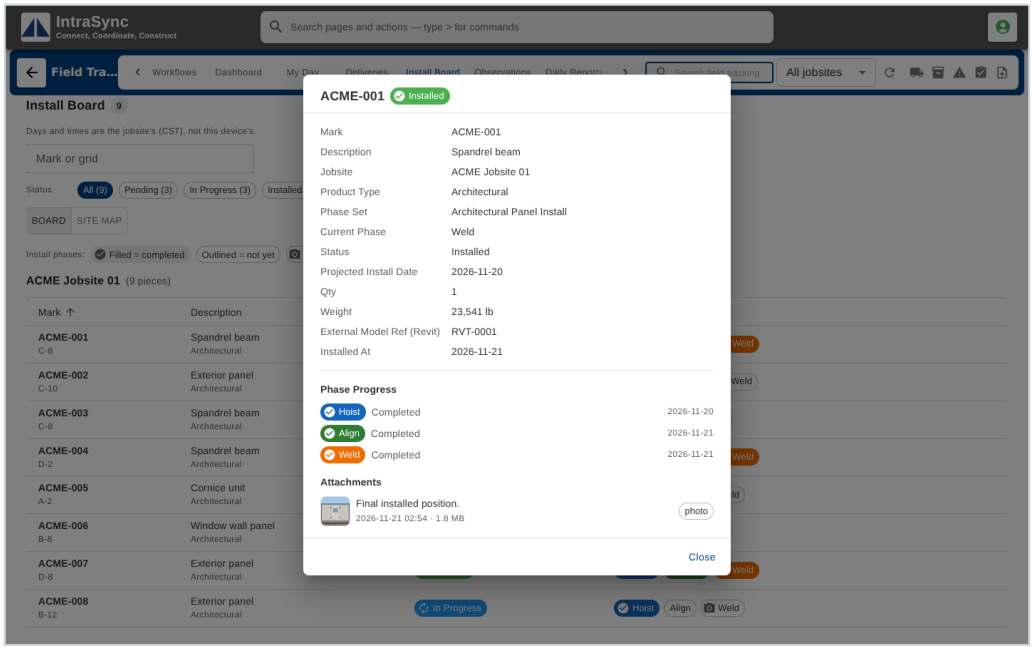
Get straight to a piece, delivery or jobsite without hunting through the tabs.



Step 1. Select the search box in the header.



Step 2. Type a piece mark, delivery number, jobsite or date. Matching records appear as you type.



Step 3. Select a result to open that record on the screen it belongs to.

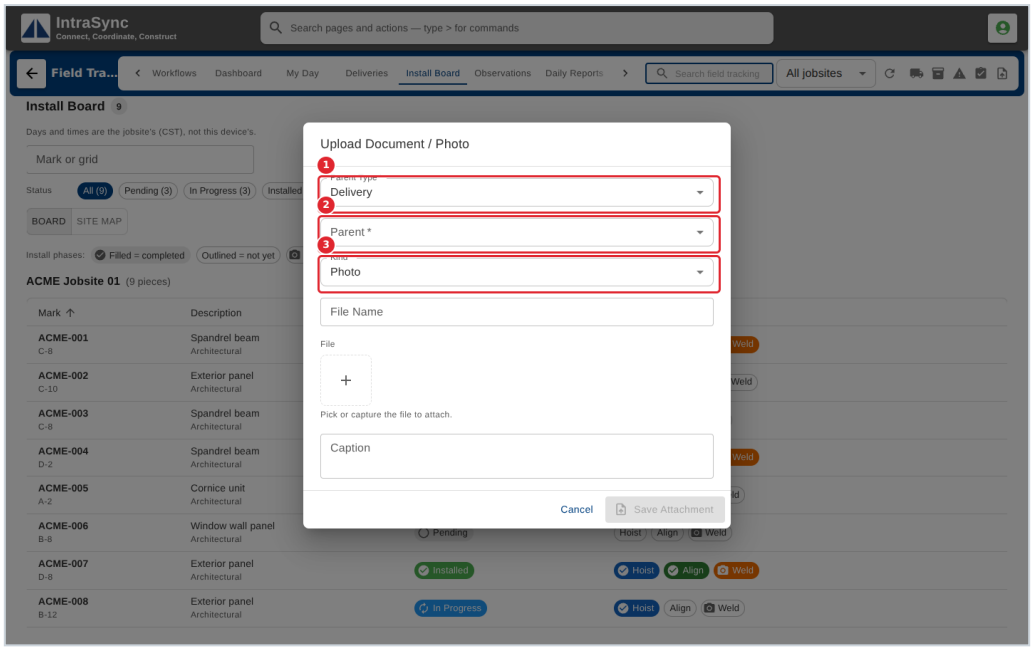
Tips:

- Search covers the jobsites, deliveries, pieces, observations, daily reports and crews loaded in the hub, and finds a date too.
- Select Close, or press Escape, to leave search without opening anything.

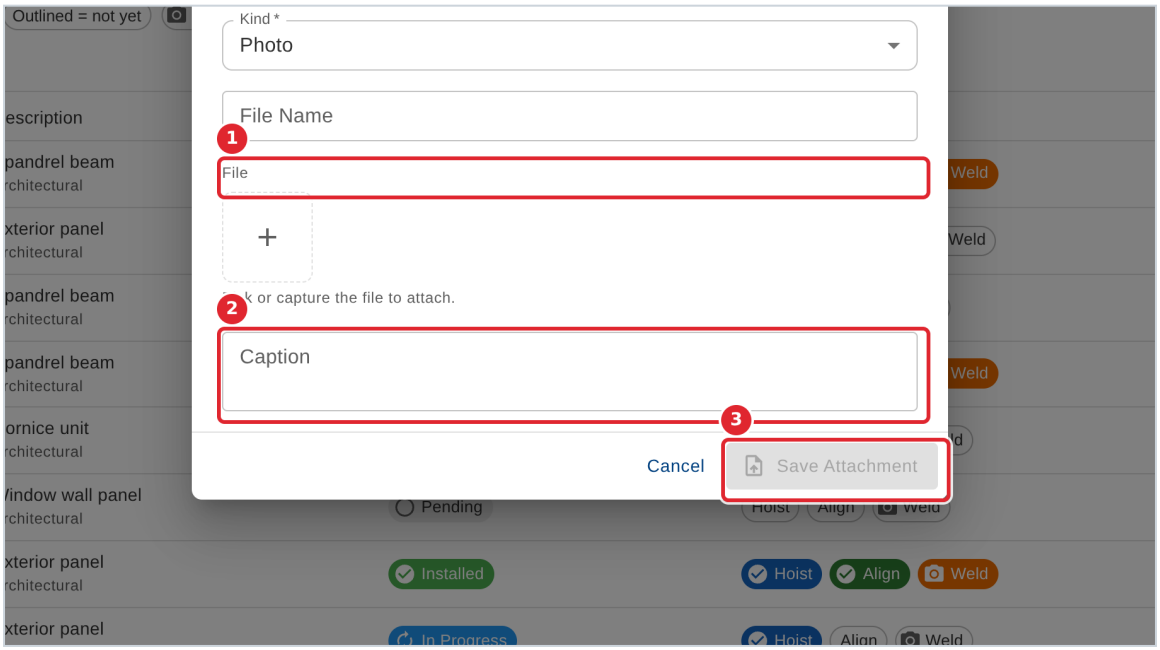
This is shown in the Field Tracking video at 1:52.

12. Attach a photo or document to a record

Keep the photos, signatures and documents for a delivery, piece, observation, report or jobsite with the record itself.



Step 1. Select Upload Document / Photo in the header. Choose what the file belongs to (a delivery, piece, observation, daily report or jobsite) and which record, then the kind of file.



Step 2. Pick or capture the file, add a caption if it helps, and select Save Attachment.

Tips:

- Parent type, parent and kind are required, and a file must be picked or captured.
- An attachment shows in the record's details under Attachments.

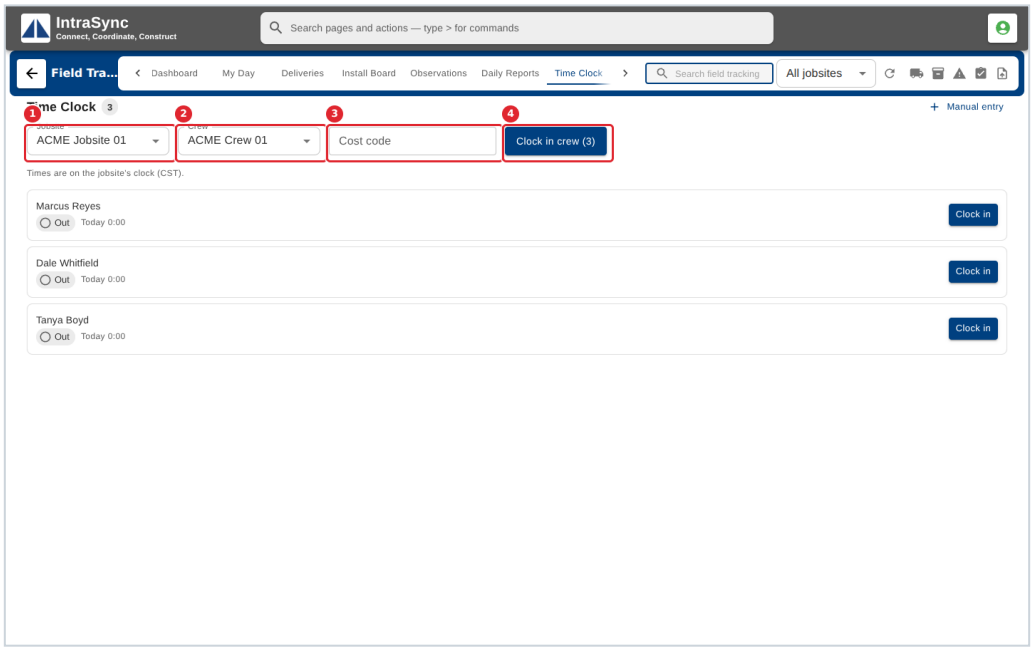
This is shown in the Field Tracking video at 2:47.

13. Clock a crew in and out

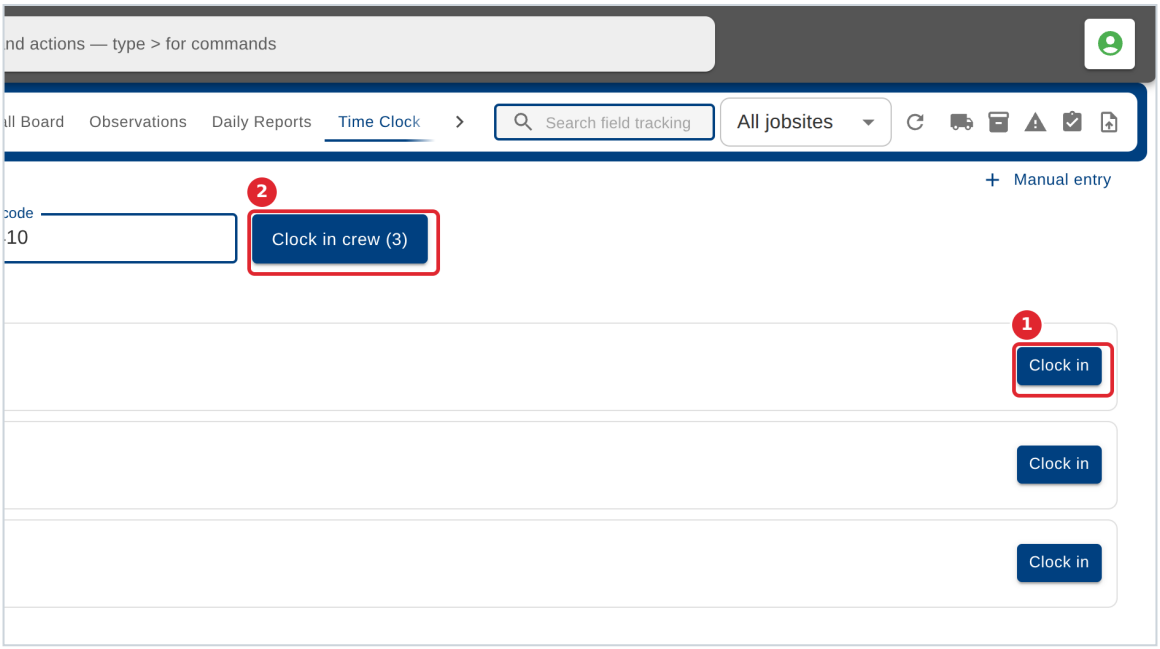
Record each person's hours on site as they happen, on the jobsite's clock.

Before you start:

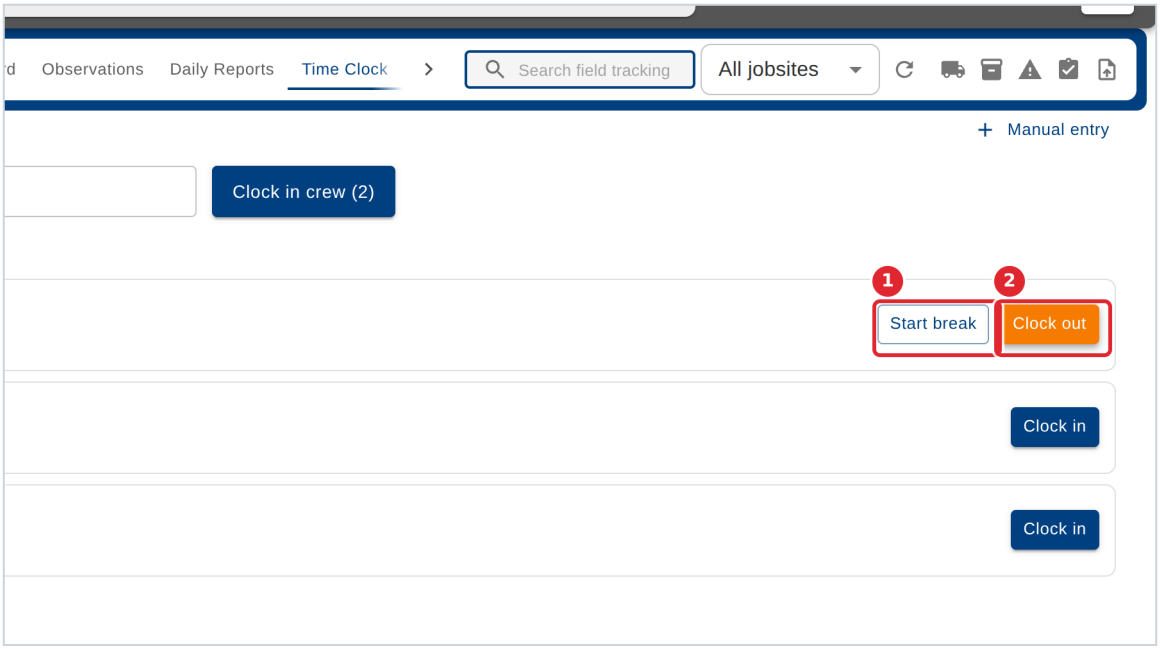
- Crew time tracking is switched on in Manage > Setup > Time & T&M.
- The crew has members, set in Manage > Crews.



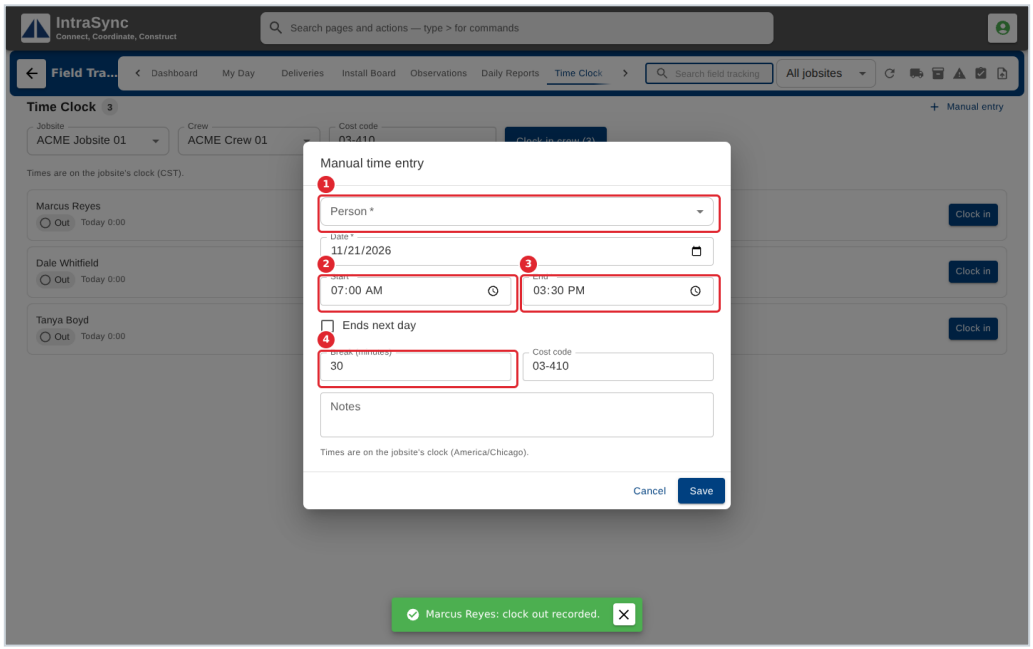
Step 1. Select Time Clock. Choose the jobsite and the crew, and enter a cost code if your company uses them.



Step 2. Select Clock in for one person, or Clock in crew for everyone who is out.



Step 3. A clocked-in person shows the time they started. Select Start break and End break around a break, and Clock out at the end of the shift.



Step 4. Select Manual entry to record time someone did not punch: the person, date, start and end, any break, and a cost code.

Tips:

- If your company requires a cost code, enter it before clocking anyone in.
- For a shift that runs past midnight, tick Ends next day in a manual entry.

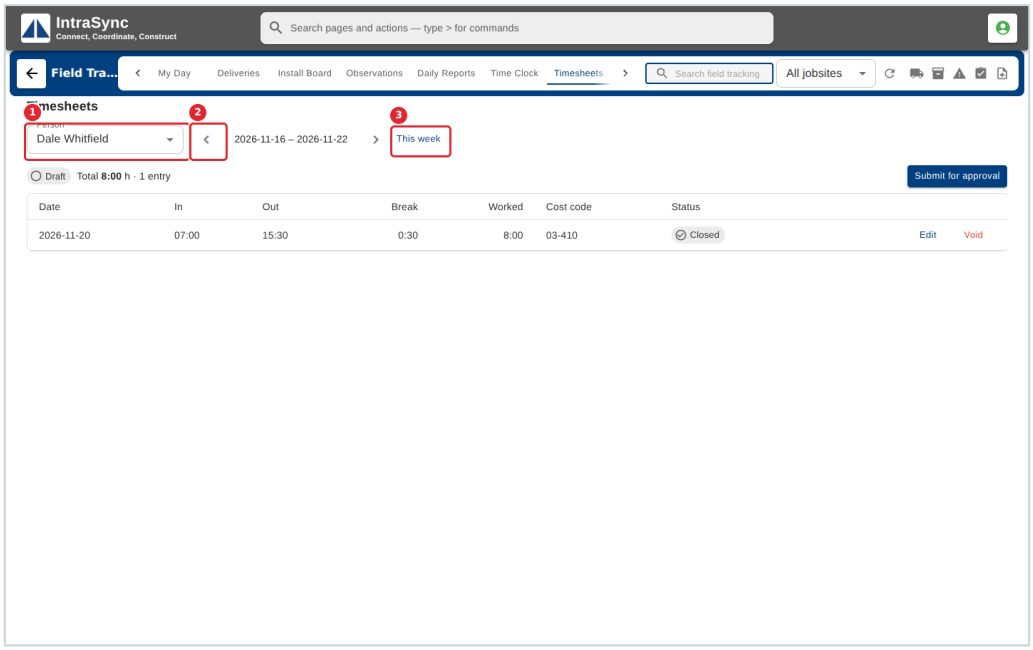
This is shown in the Field Tracking video at 0:38.

14. Review and submit a timesheet

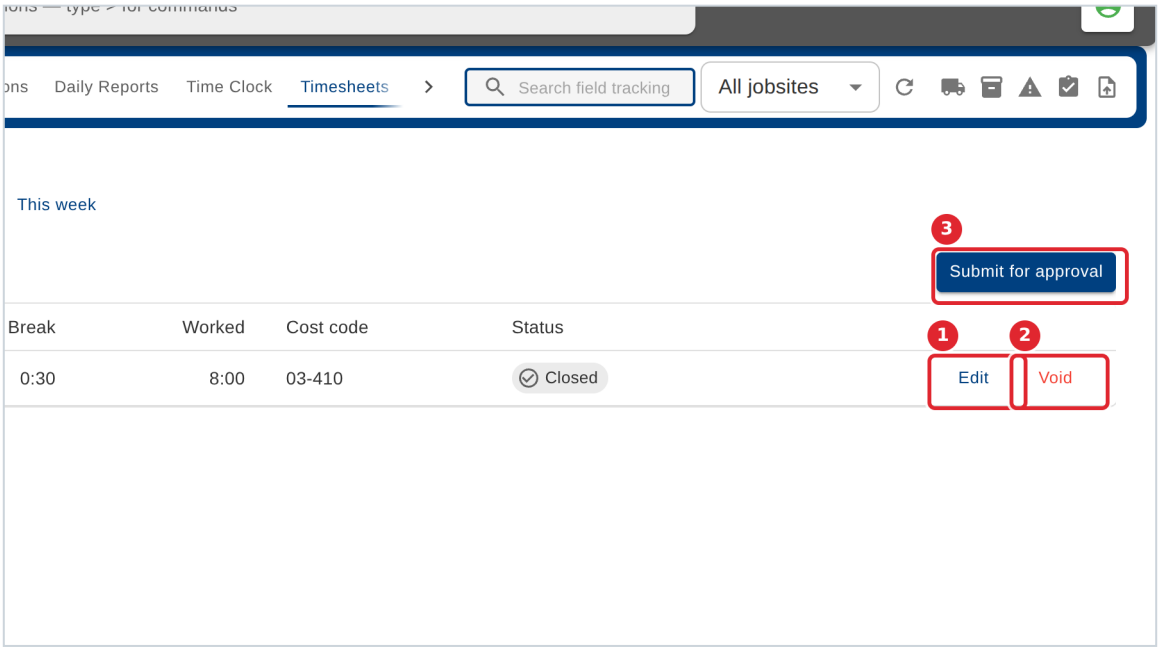
Check a person's hours for the period and send them for approval.

Before you start:

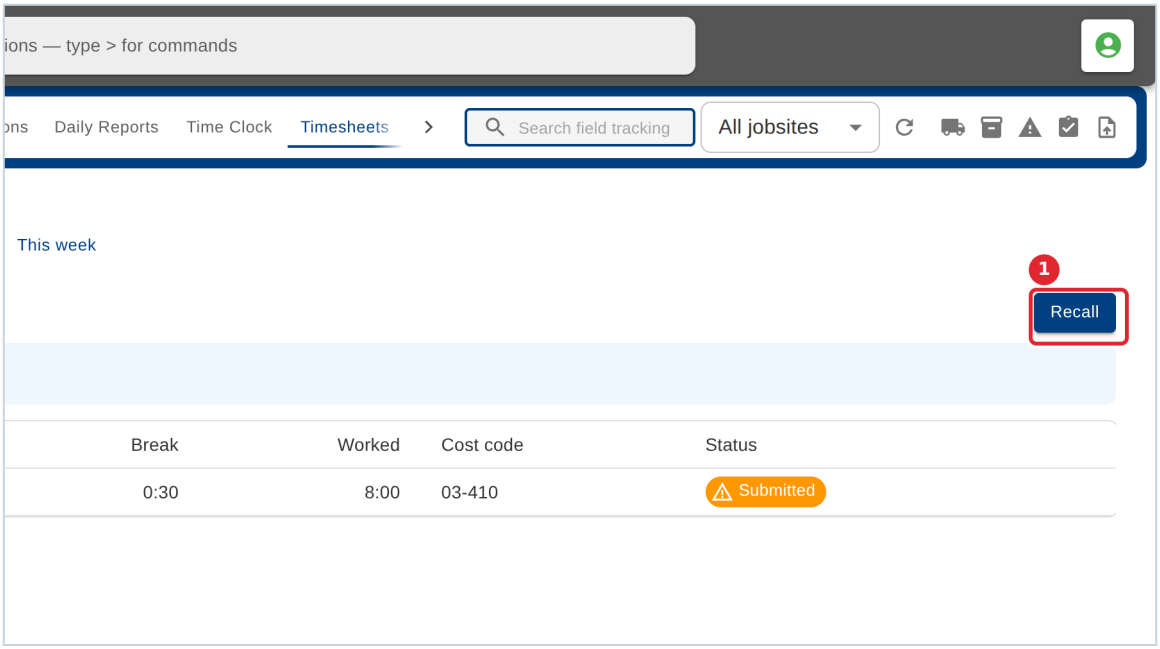
– Crew time tracking is switched on.



Step 1. Select Timesheets and choose a person. Move between periods with the arrows, or go back to the current one.



Step 2. Check each entry. Select Edit to fix it or Void to cancel it, with a reason. Then select Submit for approval.



Step 3. A submitted sheet is locked while it waits for approval. Select Recall to take it back and change it.

Tips:

- Clock out any open entry before submitting.
- An approved sheet is locked. Use Correct an entry, with a reason, to change it.
- A rejected sheet shows the manager's reason. Fix the entries and select Resubmit.

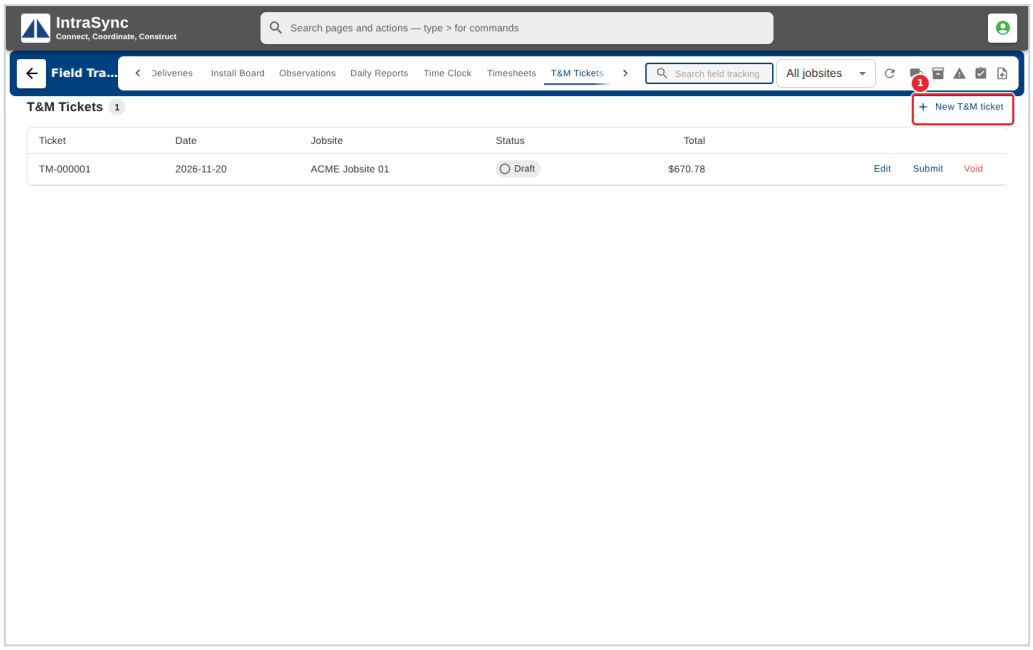
This is shown in the Field Tracking video at 0:42.

15. Write up a T&M ticket and get it signed

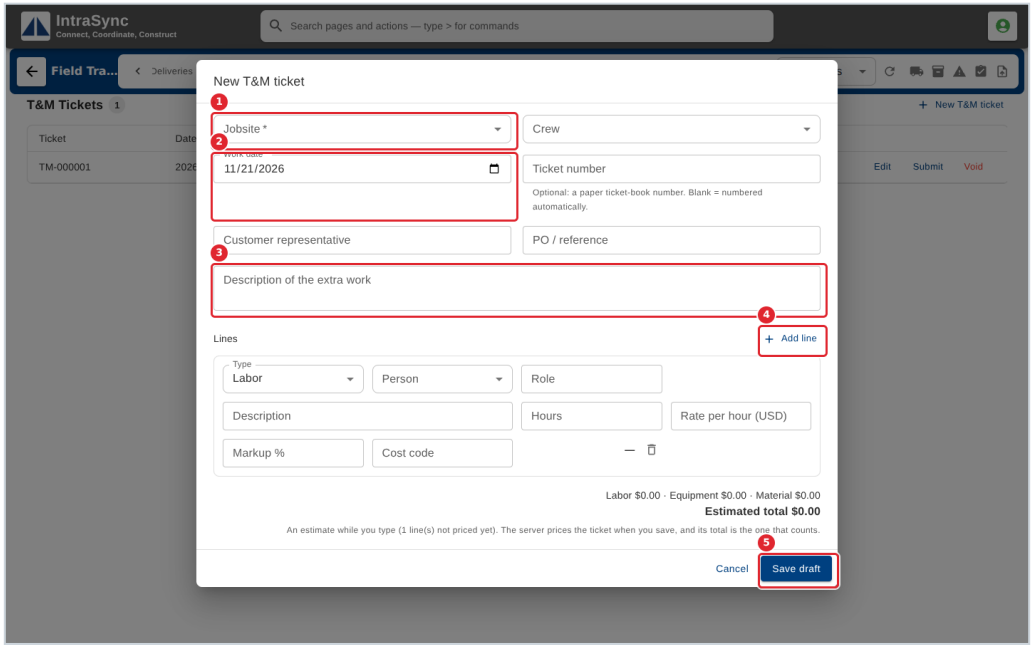
Capture extra work the customer pays for, priced line by line, with the customer's signature on site.

Before you start:

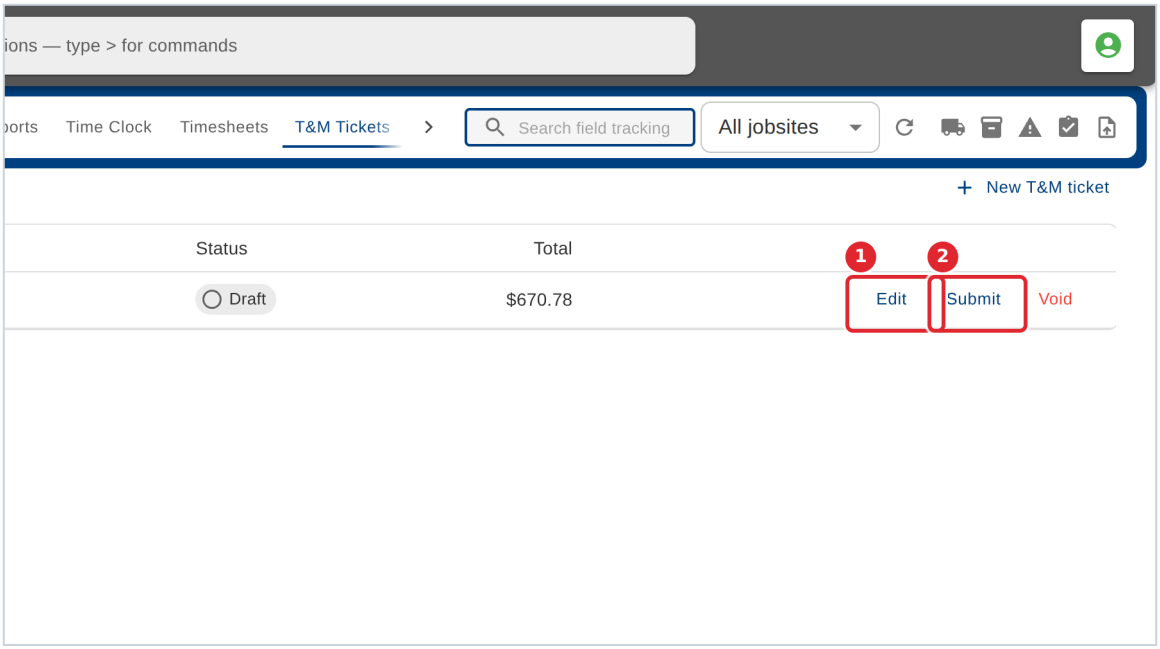
– T&M tickets are switched on in Manage > Setup > Time & T&M.



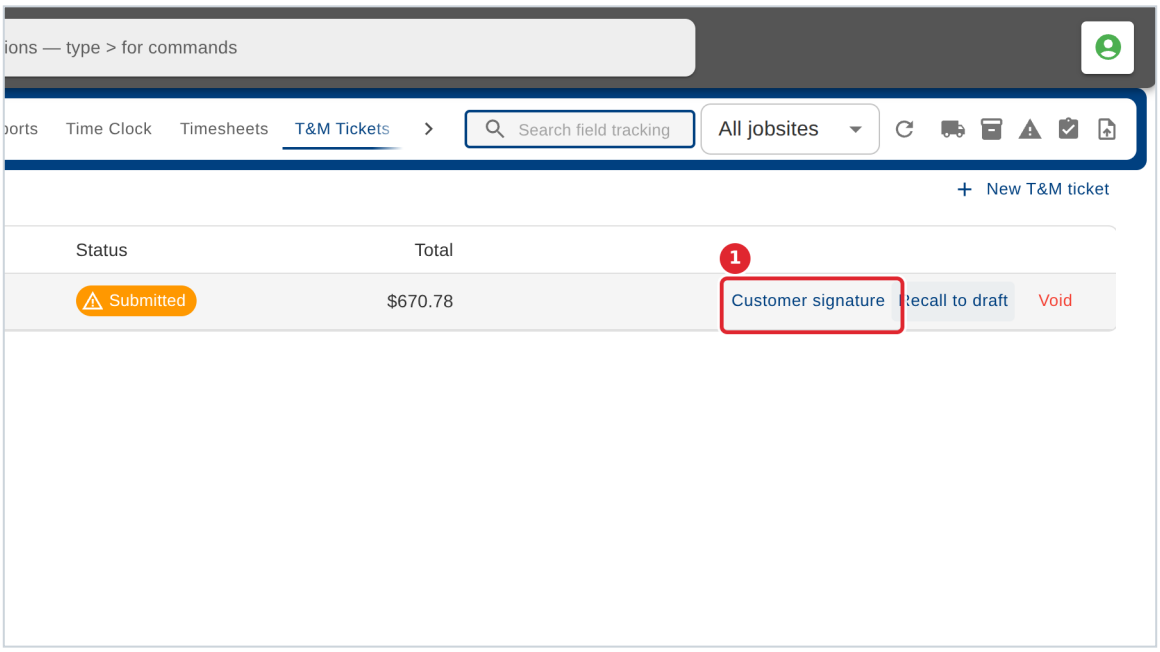
Step 1. Select T&M Tickets, then New T&M ticket to write up extra work the customer pays for.



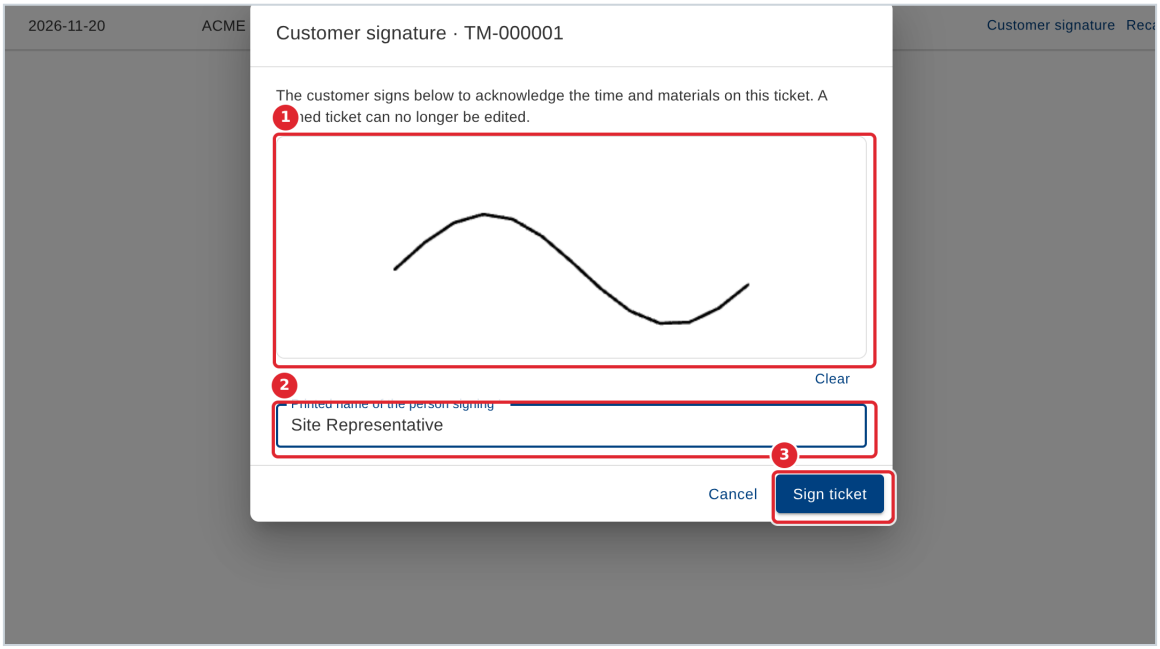
Step 2. Choose the jobsite and work date, and describe the extra work. Select Add line for each labor, equipment or material line, with its hours or quantity and price. Select Save draft.



Step 3. A draft ticket can be edited, submitted or voided. Select Submit when the work is written up.



Step 4. Select Customer signature to have the customer's representative sign on the spot.



Step 5. The signer draws in the box and their printed name is entered. Select Sign ticket. The signed ticket then waits in Approvals.

Tips:

- Jobsite and work date are required, and every line needs a price.
- Hours can be typed as hours and minutes or as a decimal.
- Past draft, a ticket cannot be edited. Recall to draft takes a submitted ticket back.
- The signer must draw a signature and their printed name must be entered before Sign ticket works.

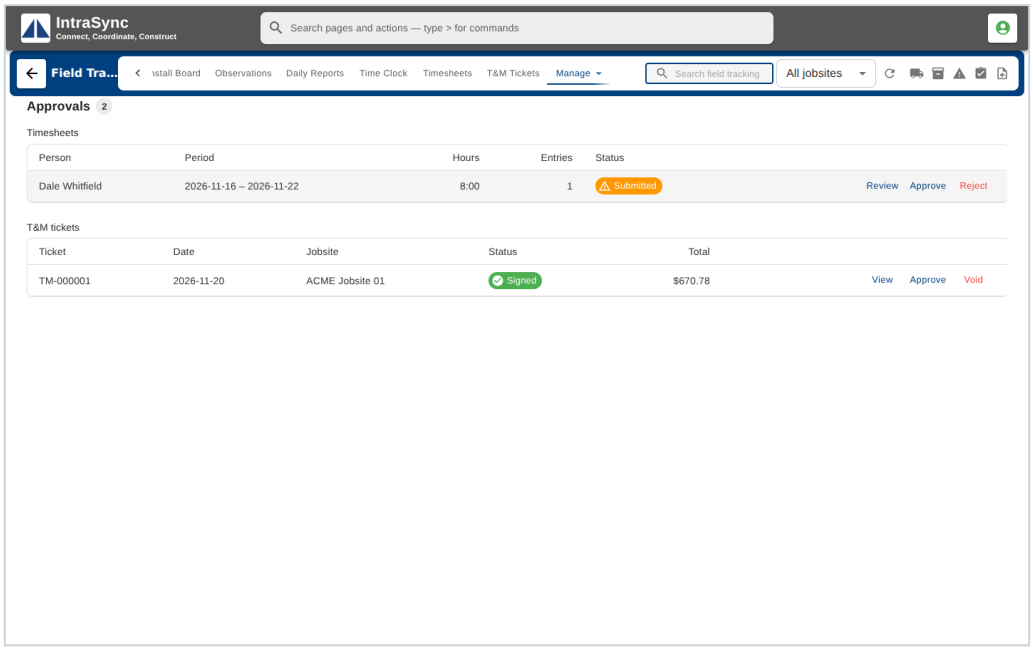
This is shown in the Field Tracking video at 0:46.

16. Approve timesheets and T&M tickets

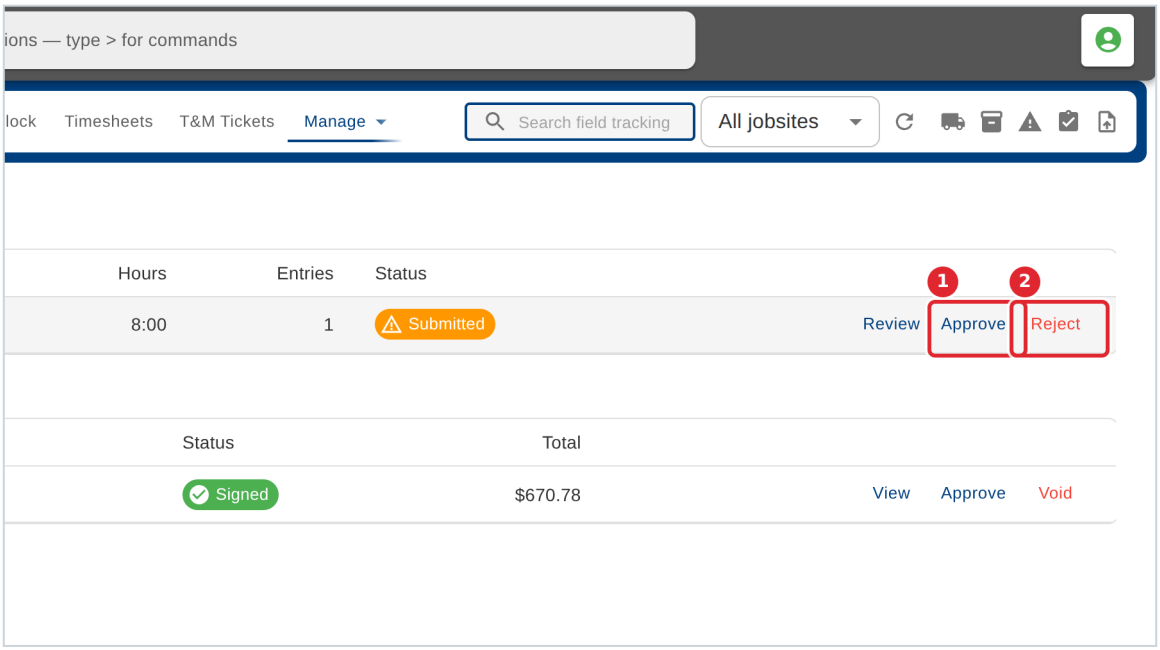
Give the manager one queue for the time and tickets waiting on a decision.

Before you start:

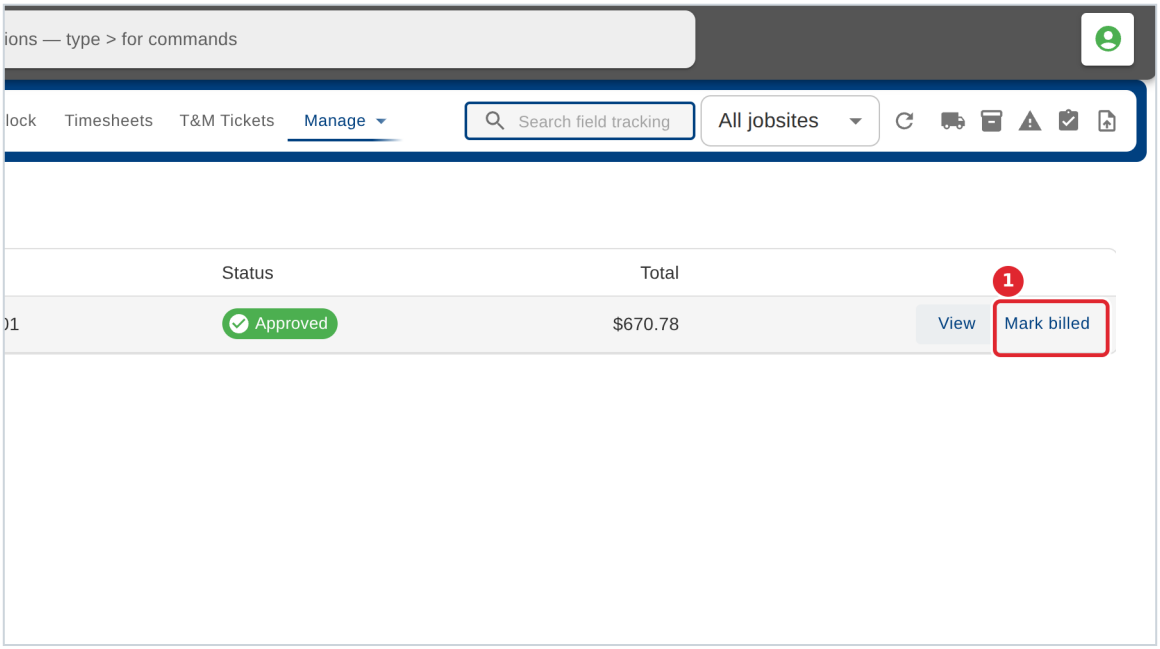
– Manager or administrator access, with crew time or T&M tickets switched on.



Step 1. Managers open Manage > Approvals. Submitted timesheets and signed T&M tickets wait here. Select Review or View to read one first.



Step 2. Select Approve, or Reject with a reason the person will see. A signed T&M ticket can be approved or voided.



Step 3. Once an approved T&M ticket has been invoiced, select Mark billed and add the billing reference.

Tips:

- A rejection needs a reason. The person sees it on their timesheet.
- If an approval does not fit the record's current status, the system refuses it and says why.

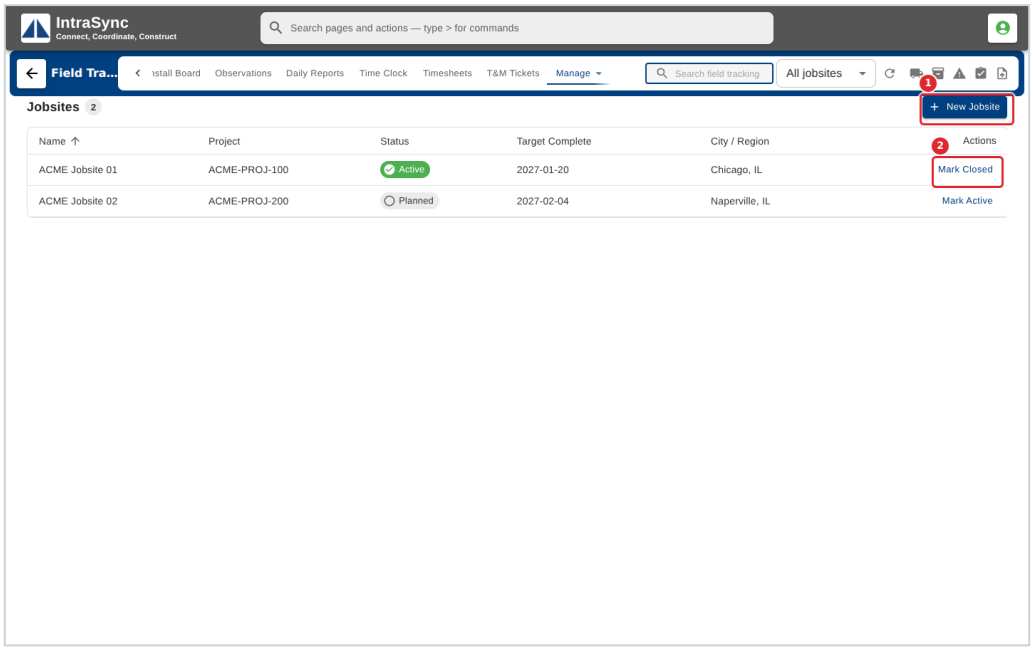
This is shown in the Field Tracking video at 1:10.

17. Add and manage jobsites

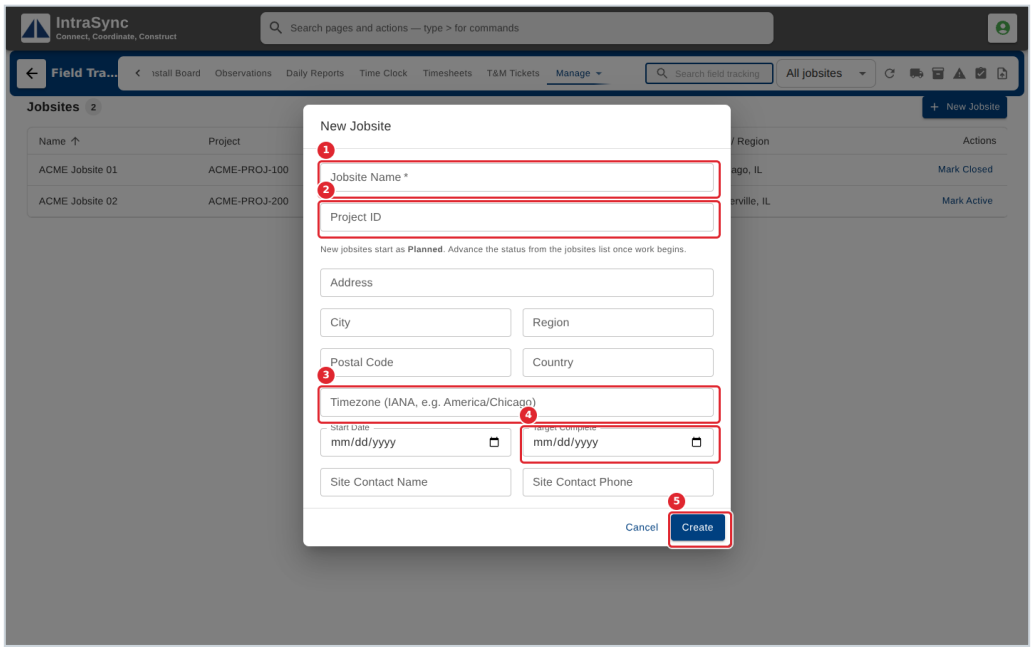
Set up the sites your crews work on, with the details every other screen uses.

Before you start:

– Manager or administrator access.



Step 1. Open Manage > Jobsites. Each jobsite shows its project, status, target completion and location. Move a jobsite to active or closed from its row.



Step 2. Select New Jobsite. Enter the jobsite name (required), the project, the address and the jobsite's timezone, and its start and target dates. Select Create.

Tips:

- Only the jobsite name is required.
- Enter the jobsite's timezone in the form's example format, so days and times read on the jobsite's clock. An unrecognised zone is flagged but does not stop you saving.
- New jobsites start as planned. Move them to active once work begins.

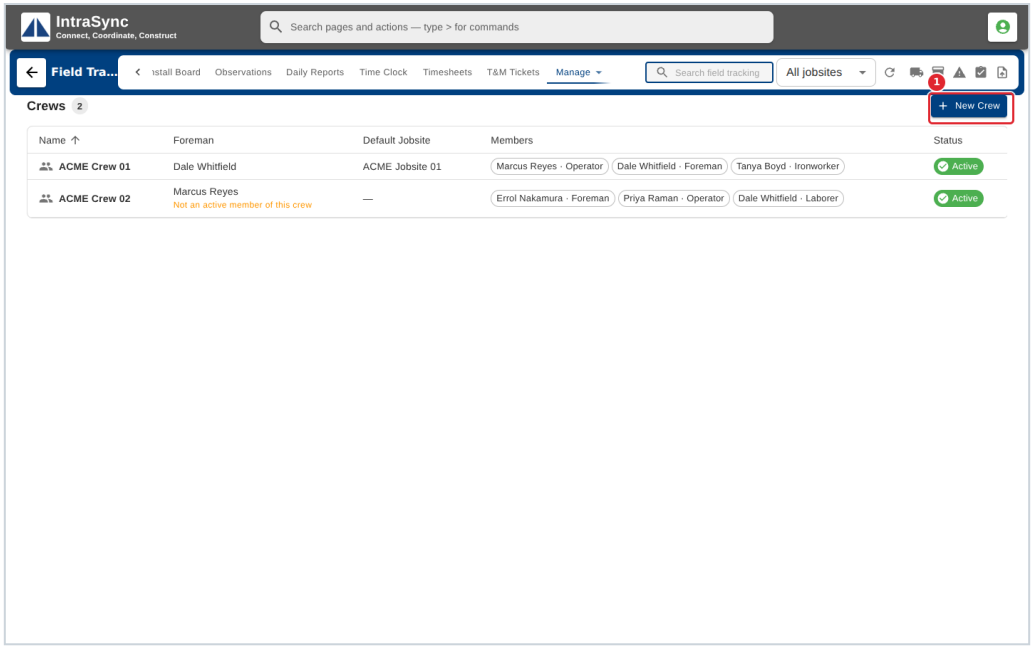
This is shown in the Field Tracking video at 0:50.

18. Set up crews and their members

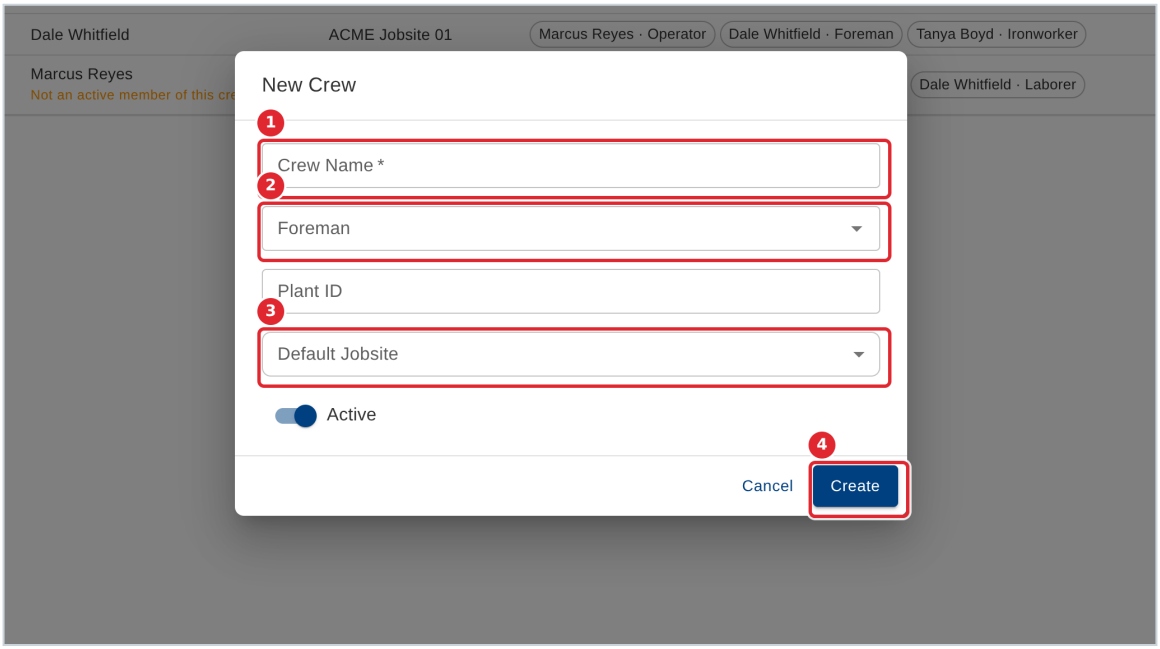
Keep each crew's foreman, default jobsite and members current, so the time clock and reports know who is on site.

Before you start:

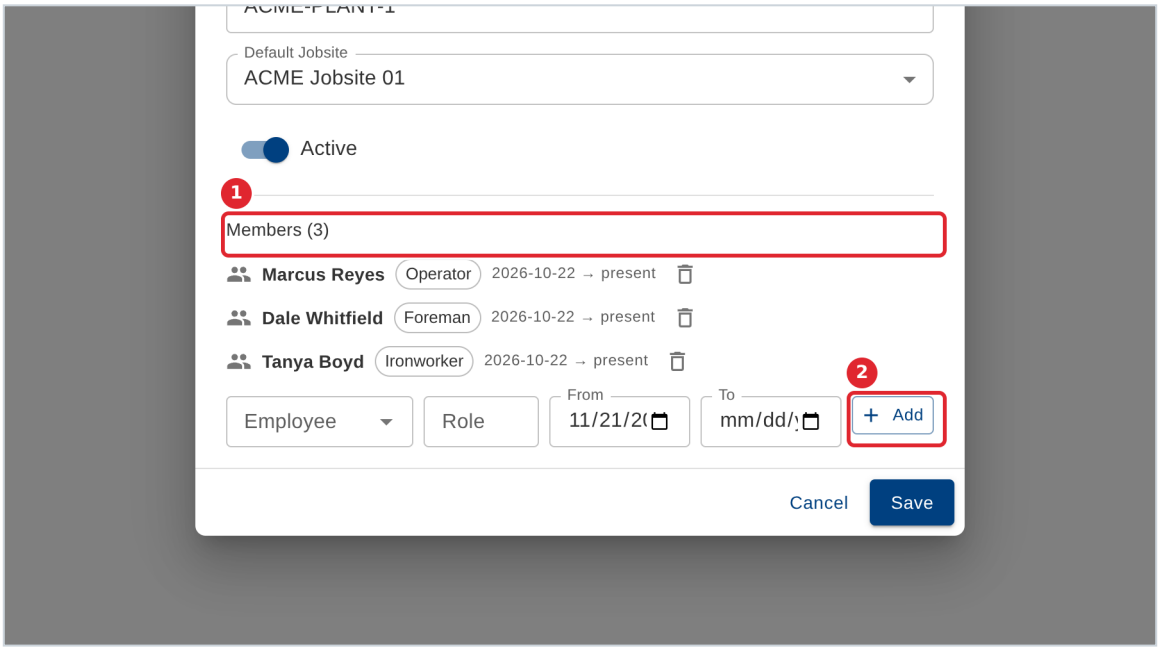
- Manager or administrator access.



Step 1. Open Manage > Crews to see each crew with its foreman, default jobsite and members.



Step 2. Select New Crew. Enter the crew name, choose the foreman and the default jobsite, and select Create.



Step 3. To change who is on a crew, open the crew and select Edit. Add a member with their role and the date they join, or remove one.

Tips:

- The crew name is required.
- The foreman should also be an active member of the crew. The list warns when they are not.
- A new member needs the date they join the crew.

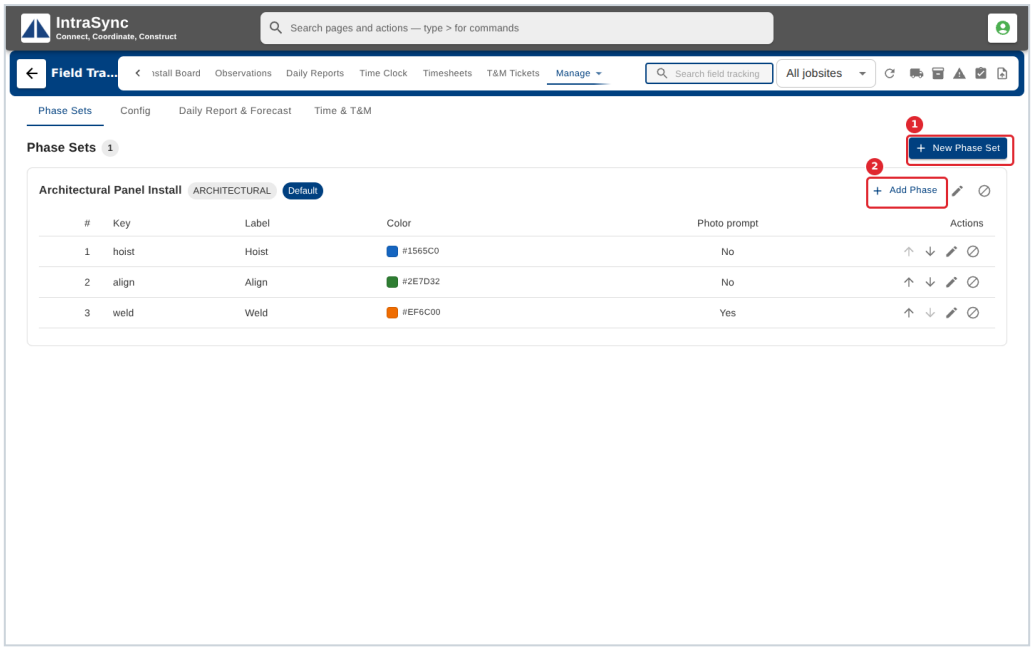
This is shown in the Field Tracking video at 0:57.

19. Define the install sequence with phase sets

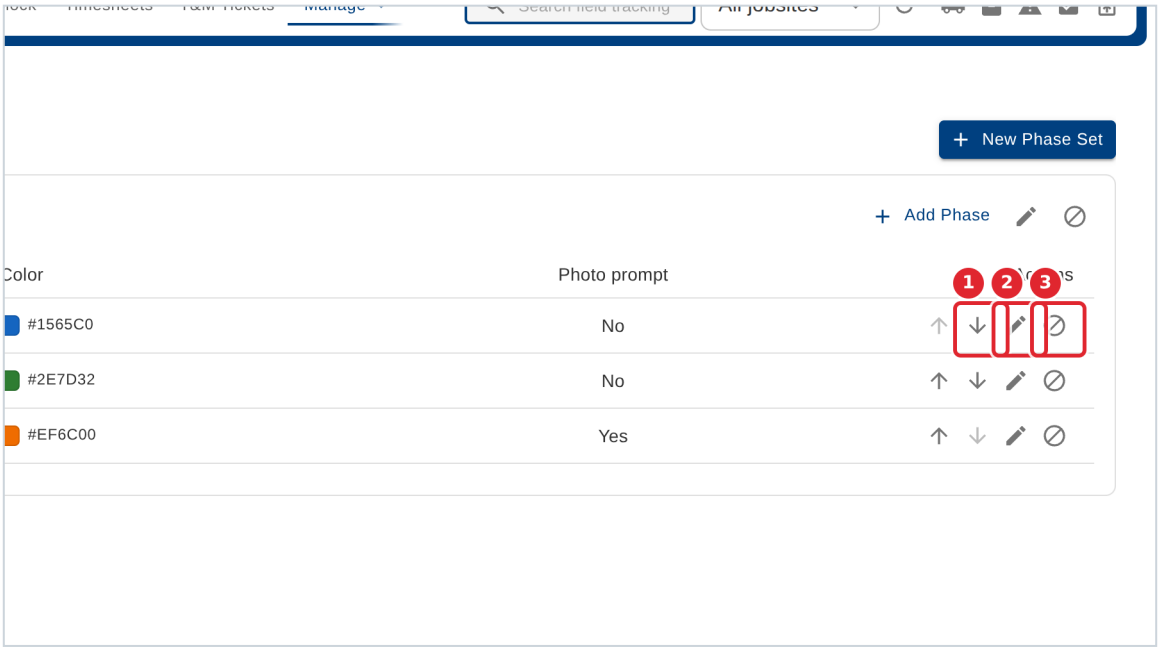
Set the steps each kind of piece goes through on site, in the order the crew does them.

Before you start:

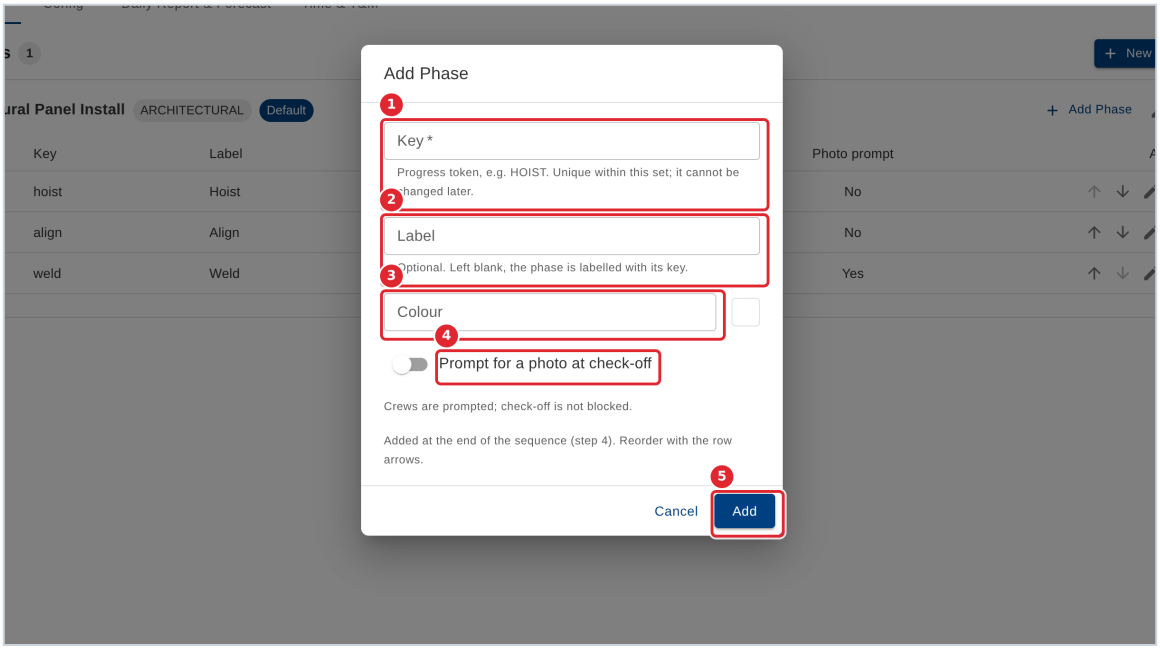
– Manager or administrator access.



Step 1. Open Manage > Setup. Phase Sets lists each install sequence and its phases in order: the order is the order the crew installs in.



Step 2. Use the arrows to move a phase up or down, the pencil to edit it, or deactivate a phase you no longer use. Check-offs already recorded are kept.



Step 3. Select Add Phase. Enter a key (it cannot change later), a label and a colour, and choose whether the crew is prompted for a photo. Select Add.

Tips:

- A phase key may use letters, numbers, hyphens and underscores, must be unique within its set, and cannot be changed later.
- A colour is a hex value, as in the form's example.
- A phase set can be deleted only while it holds no phases. Deactivate it instead.

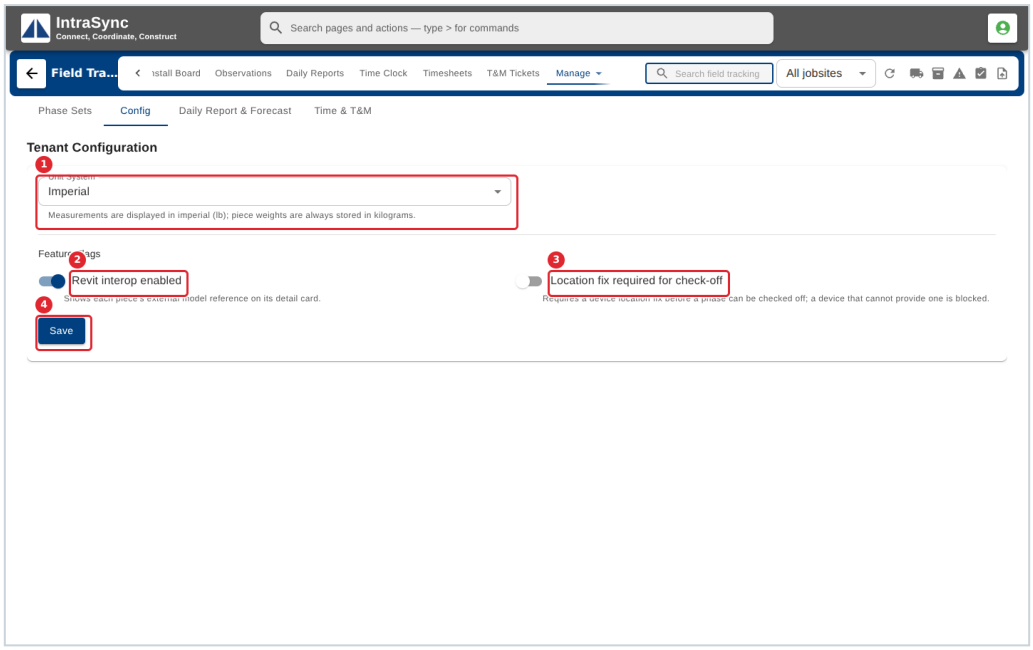
This is shown in the Field Tracking video at 1:03.

20. Choose units and field rules

Set how measurements are shown and which checks apply in the field.

Before you start:

– Manager or administrator access.



Step 1. Select Config. Choose the unit system, and switch Revit interop or the location fix for check-off on or off. Each setting says what it does. Select Save.

Tips:

– Piece weights are always stored in kilograms. The unit system changes only how they are shown.

– If someone else changed the settings while you had them open, a warning offers Reload.

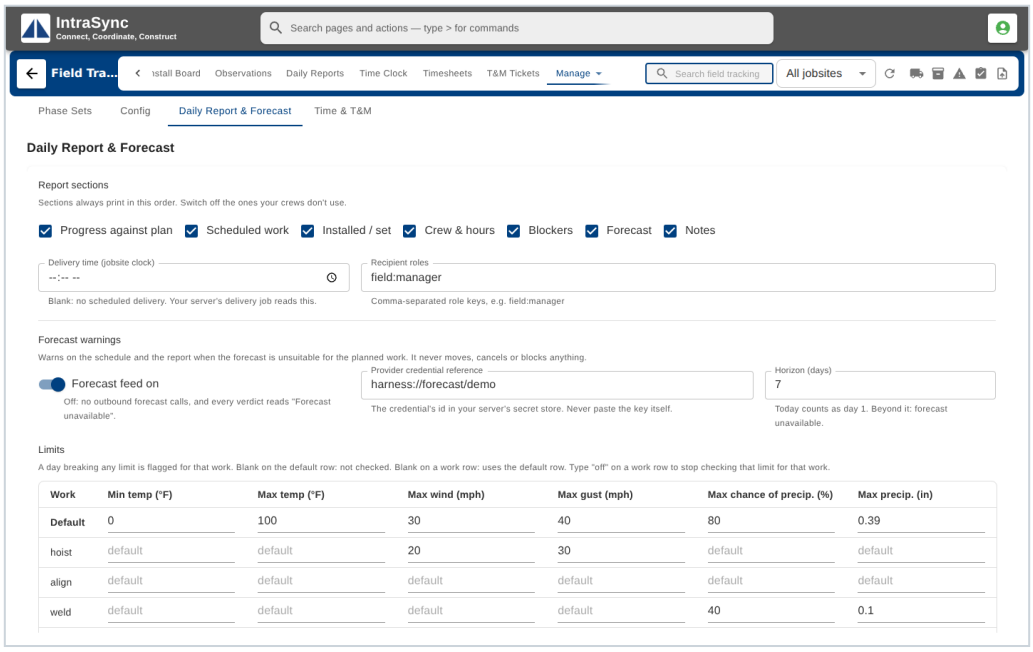
This is shown in the Field Tracking video at 2:10.

21. Set up the daily report and weather limits

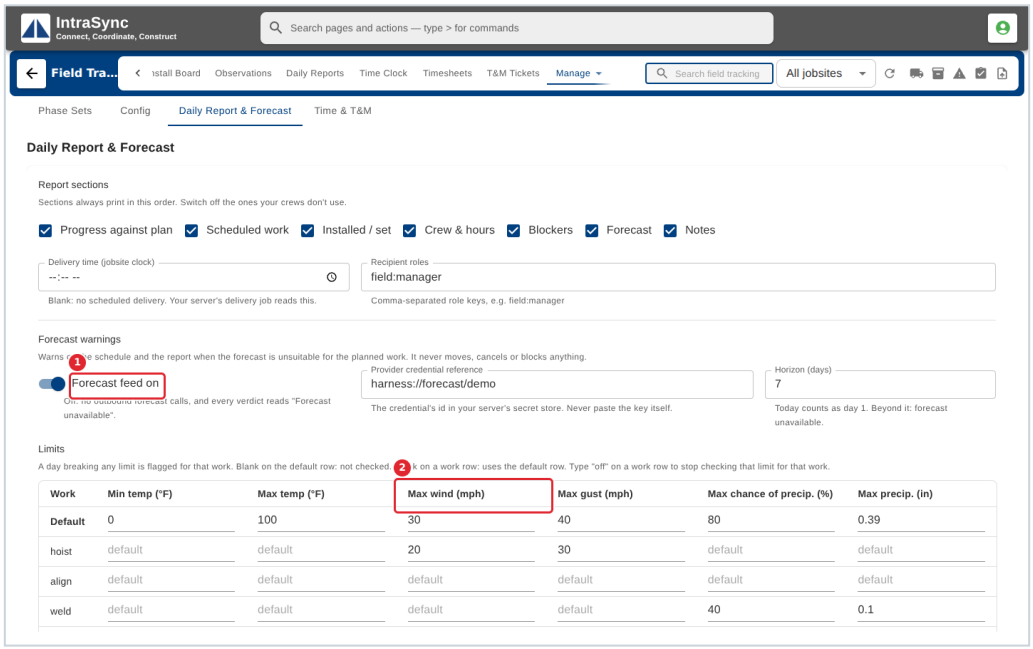
Choose what the daily report contains, and when the forecast should warn the crew off a kind of work.

Before you start:

– Manager or administrator access.



Step 1. Select Daily Report & Forecast. Tick the sections the daily report includes, and set when it is sent and to which roles.



Step 2. Turn the forecast feed on and set the weather limits for each kind of work. A day whose forecast breaks a limit shows a warning on Daily Reports. Select Save below the table.

Tips:

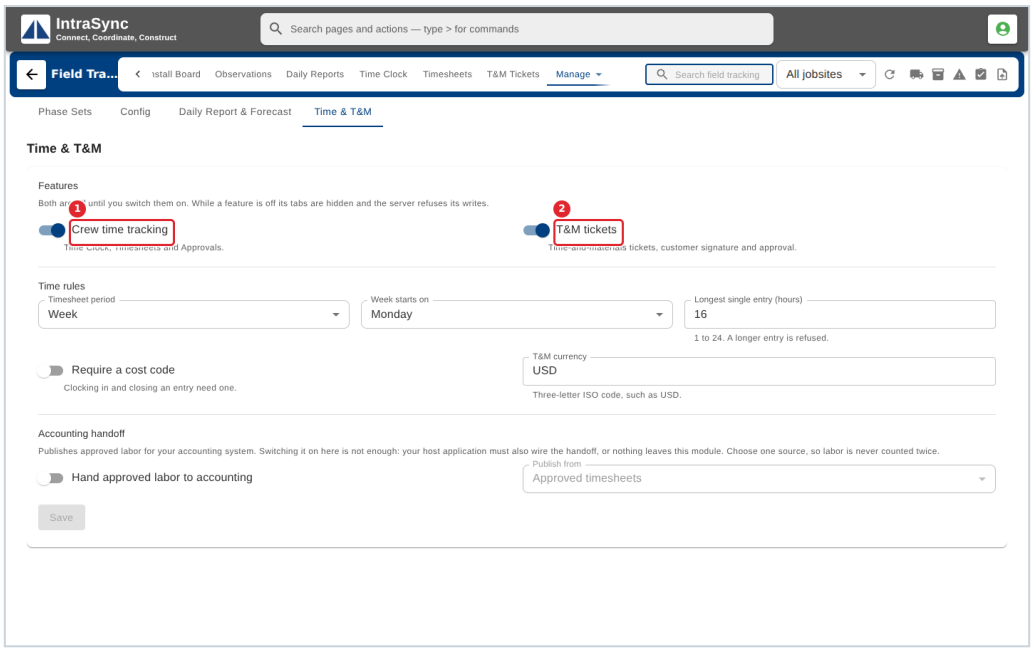
- Delivery time is on the jobsite's clock, as hours and minutes on a twenty-four hour clock.
- The forecast horizon is a whole number of days, within the range the form allows.
- Save stays unavailable until something changes.

22. Switch on crew time and T&M tickets

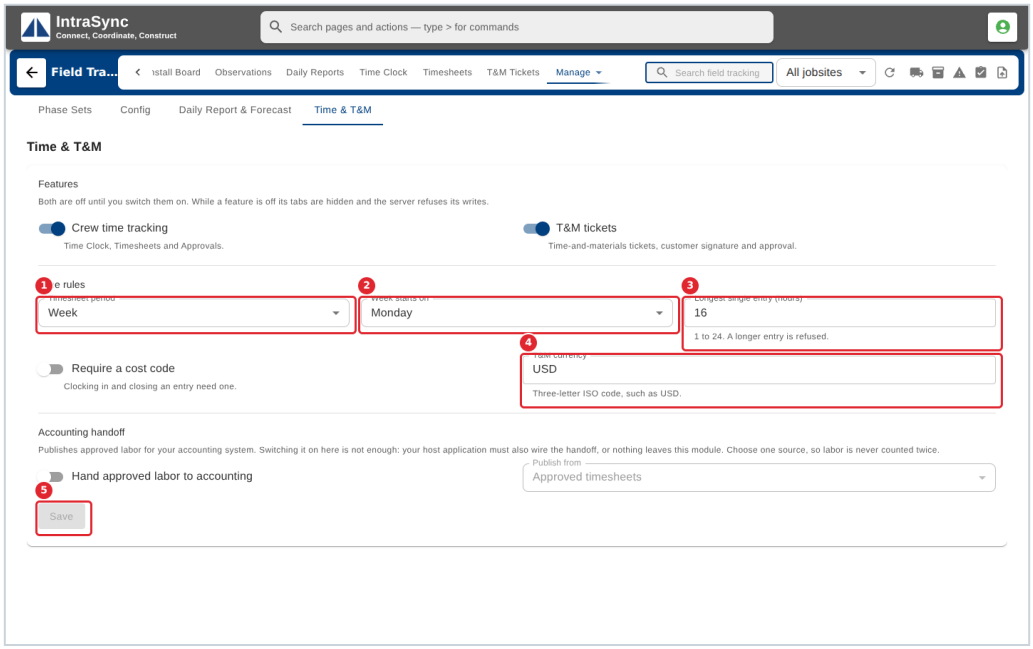
Decide whether your crews use the time clock, timesheets and T&M tickets, and how their periods work.

Before you start:

- Manager or administrator access.



Step 1. Select Time & T&M. Switch on Crew time tracking for the Time Clock and Timesheets, and T&M tickets for the T&M Tickets tab.



Step 2. Set the timesheet period and the day the week starts, the longest single entry, whether a cost code is required, and the T&M currency. Select Save.

Tips:

- Switching a feature off hides its tabs.
- The longest single entry is between one and twenty-four hours.
- The T&M currency is a three-letter code, such as USD.

Glossary

- Jobsite: A construction site the pieces are delivered to and installed at, with its own timezone.
- Phase set: The ordered install steps a kind of piece goes through on site.
- Phase: One install step in a phase set, checked off per piece.
- Observation: A quality problem or punch item found in the field, tracked from open to accepted.
- Daily report: One crew's record of a day at a jobsite: planned and completed pieces, weather, manpower and a narrative.
- T&M ticket: A time-and-materials ticket for extra work the customer pays for, signed by the customer's representative.