FieldWire - Administrator User Manual

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Introduction

FieldWire is a construction project management system designed for construction project support and management. This manual is intended for users with the **System Administrator** role.

Administrator Role

The System Administrator has full access to all application features: - Management of all projects in the system - Management of all users and team members - Configuration of system rules and message templates - Access to all reports and analytics - Assignment of project managers

Logging In

Authentication

1. Open the FieldWire application in your browser
2. On the login page, enter:

    - **Email** - your email address
    - **Password** - your password
3. Click the **“Sign In”** button

Password Reset

If you forgot your password: 1. On the login page, click **“Forgot password?”** 2. Enter your email 3. Follow the instructions in the email to reset your password

Password Change

If you have a temporary password: 1. After logging in, you will be redirected to the password change page 2. Enter your current password 3. Enter a new password (must meet security requirements) 4. Confirm the new password 5. Click **“Change Password”**

Main Menu

The main menu is located at the top of the screen and contains the following items:

Available for Administrators:

1. **Dashboard** - Main dashboard with system overview
2. **Projects** - Management of all projects
3. **Builders** - Team and user management
4. **Reports** - View reports and analytics
5. **Account** - Account settings
6. **Admin Settings** - Administrative settings (administrators only)

Dashboard

Overview

The Administrator Dashboard provides a system overview: - User statistics - Current user information - Quick access to main functions

Dashboard Elements

- **User Management** - User management
- **System Settings** - System settings
- **Analytics** - System analytics

User Information

The Dashboard displays information about the current user: - **Category** - Role category (Global) - **Role** - Role (admin) - **Name** - User name - **Email** - Email address - **ID** - User identifier - **Status** - Status (Active/Inactive) - **2FA** - Two-factor authentication status (Enabled/Disabled)

Project Management

Project List

Access to the list of all projects through the **Projects** menu.

Project List Functions:

1. **Project Search**
    - Use the search field to filter projects by name
    - Search works in real-time
2. **Project Filtering**
    - By status (Active, Completed, On Hold, Draft)
    - By priority (High, Medium, Low)
    - By project manager
3. **Project Sorting**
    - By name (A-Z, Z-A)
    - By creation date
    - By status
    - By progress
4. **Project Statistics**
    - Total number of projects
    - Active projects
    - Completed projects
    - Projects on hold

Creating a New Project

1. On the project list page, click the **"New Project"** button
2. Fill in the project creation form:
    - **Project Name** * (required) - Project name
    - **Address** - Project address
    - **Description** - Project description
    - **Priority** - Priority (High, Medium, Low)
    - **Status** - Status (Draft, Active, On Hold, Completed)
    - **Start Date** - Project start date
    - **End Date** - Project end date
    - **Project Manager** - Project manager (only administrators can assign)
3. Click **"Create Project"**

Viewing Project (Admin View)

Administrators have a special project view (`/projects/:id/admin`) that provides: - Project overview - Task statistics - Team information - Quick access to settings

Editing a Project

1. Open a project from the list
2. Go to the **Settings** section
3. Change the necessary fields:
    - Project name
    - Address
    - Description
    - Priority
    - Status
    - Start and end dates
    - Project manager
4. Click **"Save Changes"**

Deleting a Project

1. Open the project
2. Go to the **Settings** section
3. Click the **"Delete Project"** button
4. Confirm deletion

Team Management (Builders)

Access to Team Management

The **Builders** menu provides access to management of all system users.

View Modes

1. **Registered** - Registered users
2. **Pending** - Users with pending invitations

Team Management Functions

Search and Filtering

1. **Text Search**
    - Enter name, surname, email, or job title in the search field
    - Search works in real-time

2. **Filters**
    - **User Type** - Filter by user type (role)
    - **Status** - Filter by status (Active, Inactive)
    - **Invitation Status** - Filter by invitation status (Registered, Invited)

Viewing User Information

1. Click on a user card
2. A dialog opens with detailed information:
    - Personal information
    - Contact details
    - Role and access rights
    - System status
    - Activity history

Inviting a New User

1. Click the **"Invite Builder"** button
2. Fill in the invitation form:
    - **Email** * - User email address
    - **First Name** * - First name
    - **Last Name** * - Last name
    - **Role** - System role
    - **Job Title** - Job title
    - **Phone** - Phone number
3. Click **"Send Invitation"**

Editing a User

1. Open the user card
2. Click the **"Edit"** button
3. Change the necessary fields
4. Click **"Save Changes"**

Deleting a User

1. Open the user card
2. Click the **"Delete"** button
3. Confirm deletion

Reports

Access to Reports

The **Reports** menu provides access to various reports and analytics.

Report Types

1. **Project Reports** - Project reports
2. **Task Reports** - Task reports
3. **Team Reports** - Team reports
4. **Performance Reports** - Performance reports

Exporting Reports

Most reports can be exported in various formats: - PDF - Excel - CSV

Account Settings

Access to Settings

The **Account** menu provides access to your account settings.

Settings Sections

1. Basic Information

- **Avatar** - Upload and change avatar
- **Full Photo** - Upload full photo
- **Gender** - Gender
- **Age/Birth Date** - Age/Birth date
- **Specialty/Job Title** - Specialty/Job title

2. Contact Information

- **Email** - Email address
- **Phone** - Phone number
- **Address** - Address

3. Security

- **Change Password** - Change password
- **Two-Factor Authentication** - Two-factor authentication

4. Preferences

- **Language** - Interface language

- **Timezone** - Timezone
- **Notifications** - Notification settings

Administrative Settings

Access to Administrative Settings

The **Admin Settings** menu is available only for users with the **System Administrator** role.

Administrative Settings Sections

1. Event Rules

Event rules allow you to configure automatic actions when certain events occur in the system.

Viewing Rules

1. Open the **Event Rules** section
2. View the list of all rules:
   - **System Rules** - System rules (created by the system)
   - **Custom Rules** - Custom rules (created by administrators)

Filtering Rules

- By rule type (System/Custom)
- By event type
- By status (Enabled/Disabled)
- By execution location

Creating a New Rule

1. Click the **"Create Rule"** button
2. Fill in the form:
   - **Event Type** * - Event type
   - **Rule Name** * - Rule name
   - **Description** - Rule description
   - **Enabled** - Enabled/Disabled
   - **Execution Location** - Execution location (Frontend/Backend)
   - **Conditions** - Rule trigger conditions
   - **Actions** - Actions when rule is triggered
3. Click **"Create Rule"**

Editing a Rule

1. Find the rule in the list
2. Click the **“Edit”** button
3. Change the necessary fields
4. Click **“Update Rule”**

Deleting a Rule

Important: Only custom rules can be deleted. System rules cannot be deleted.

1. Find a custom rule in the list
2. Click the **“Delete”** button
3. Confirm deletion

2. Message Templates

Message templates are used for automatic notification sending.

Template Types

- **Email Templates** - Email message templates
- **SMS Templates** - SMS message templates

Viewing Templates

1. Open the **Message Templates** section
2. Select template type (Email/SMS)
3. View the list of templates

Creating a New Template

1. Click the **“Create Template”** button
2. Fill in the form:
    - **Template Name** * - Template name
    - **Subject** - Message subject (for email)
    - **Body** * - Template text
    - **Variables** - Available variables for substitution
3. Click **“Create Template”**

Editing a Template

1. Find the template in the list
2. Click the **“Edit”** button
3. Change the necessary fields

4. Click **“Update Template”**

Deleting a Template

1. Find the template in the list
2. Click the **“Delete”** button
3. Confirm deletion

Working with Projects (Detailed Overview)

Project Structure

When opening a project, the administrator sees the following sections:

1. **Plans** - Plans and drawings
2. **Tasks** - Project tasks
3. **Photos** - Project photos
4. **Team** - Project team
5. **Settings** - Project settings

Plans Section

File Management

1. **Uploading Files**
    - Click the **“Upload”** button
    - Select files to upload
    - Select destination folder
    - Click **“Upload”**
2. **Creating Folders**
    - Click the **“New Folder”** button
    - Enter folder name
    - Click **“Create”**
3. **Viewing Files**
    - Icons view (Icons View)
    - List view (Details View)
4. **File Operations**
    - **Preview** - View file
    - **Download** - Download file
    - **Rename** - Rename
    - **Move** - Move to another folder
    - **Delete** - Delete file

Tasks Section

Viewing Tasks

Tasks are displayed in several views: - **Calendar View** - Calendar view - **Gantt View** - Gantt chart - **List View** - Task list

Creating a Task

1. Click the **"New Task"** button or click on a date in the calendar
2. Fill in the form:
    - **Task Name** * - Task name
    - **WBS Path** - Work breakdown structure path
    - **Start Date** * - Start date
    - **End Date** * - End date
    - **Duration** - Duration (days)
    - **Status** - Status (Planned, In Progress, Done, Blocked, Delayed)
    - **Progress** - Completion progress (%)
    - **Task Lead** - Responsible person
    - **Team Members** - Team members
    - **Dependencies** - Dependencies on other tasks
    - **Resources** - Resources
    - **Notes** - Notes
3. Click **"Create Task"**

Creating a Milestone

1. Click the **"New Milestone"** button or select the option when creating a task
2. Fill in the form:
    - **Milestone Name** * - Milestone name
    - **Milestone Type** - Type (Inspection, Visit, Meeting, Review, Delivery, Approval, Other)
    - **Date** * - Milestone date
    - **Status** - Status
    - **Project Lead** * - Responsible person
    - **Invited People** - Invited people (external participants)
    - **Notes** - Notes
3. Click **"Create Milestone"**

Editing a Task

1. Click on a task in the calendar or list
2. The editing dialog opens
3. Change the necessary fields
4. Click **"Save Changes"**

Editing a Milestone

1. Click on a milestone in the calendar
2. The milestone editing dialog opens
3. Change the necessary fields
4. Click **“Save Changes”**

Deleting a Task/Milestone

1. Open the task/milestone for editing
2. Click the **“Delete”** button
3. Confirm deletion

Duplicating a Task

1. Open the task for editing
2. Click the **“Duplicate”** button
3. The task will be copied with a new name

Task Dependencies

1. Open the task for editing
2. Go to the **Dependencies** section
3. Click **“Add Dependency”**
4. Select the predecessor task
5. Select dependency type:
    - **FS (Finish-to-Start)** - Finish-to-start
    - **SS (Start-to-Start)** - Start-to-start
    - **FF (Finish-to-Finish)** - Finish-to-finish
    - **SF (Start-to-Finish)** - Start-to-finish
6. Specify lag (lag days)
7. Click **“Add”**

Assigning Team to Task

1. Open the task for editing
2. Go to the **Team & Resources** section
3. Select **Task Lead** - responsible for the task
4. Select **Team Members** - team members to execute the task
5. Click **“Save Changes”**

Exporting Tasks to iCal

1. Open the **Tasks** section
2. Click the **“Export to iCal”** button
3. The file will be downloaded in .ics format

Photos Section

Uploading Photos

1. Click the **“Upload Photo”** button
2. Select photos
3. Add description (optional)
4. Click **“Upload”**

Viewing Photos

- Photos are displayed as a gallery
- Click on a photo to view in full size

Team Section

Viewing Project Team

The Team section displays a list of all project team members with information: - Name and photo - Role in project - Assigned tasks - Status

Adding Team Member

1. Click the **“Add Team Member”** button
2. Select a user from the list of available users
3. Select role in project
4. Click **“Add”**

Viewing Team Member Details

1. Click on a team member card
2. A dialog opens with detailed information:
   - Personal information
   - Role in project
   - Assigned tasks
   - Activity history

Deleting Team Member

1. Open team member details
2. Click the **“Remove from Project”** button
3. Confirm deletion

Assigning Worker to Task

1. In the Team section, find the task
2. Click the **“Assign Worker”** button
3. Select worker from the list
4. Click **“Assign”**

Removing Worker from Task

1. In the Team section, find the task
2. Find the assigned worker
3. Click the **“Remove”** button next to the worker
4. Confirm removal

Settings Section

Basic Project Settings

- **Project Name** - Project name
- **Address** - Project address
- **Description** - Project description
- **Priority** - Priority (High, Medium, Low)
- **Status** - Status (Draft, Active, On Hold, Completed)
- **Start Date** - Project start date
- **End Date** - Project end date
- **Project Manager** - Project manager (only administrator can change)

Saving Changes

1. Change the necessary fields
2. Click the **“Save Changes”** button
3. Changes will be saved

Tips and Recommendations

Security

- Change your password regularly
- Use two-factor authentication
- Do not share your credentials with others

Performance

- Use filters for quick project and task search
- Export data for analysis outside the system
- Regularly check and clean inactive projects

Best Practices

- Always fill in project description when creating

- Set realistic project start and end dates
- Assign responsible person for each task
- Regularly update task statuses
- Use milestones to track key events

Support

If you have questions or issues: 1. Check this manual 2. Contact the system administrator 3. Contact technical support

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