WEB PORTALS FOR VISTA™ BY VIEWPOINT

Employee Self Service

Empower your employees & streamline your back-office

Gives employees the ability to:
• Access earnings
• Update personal information
• Request time off
• Timecard entry
• Crew timecard entry
• Benefit enrollment

Give your employees a secure, efficient, and mobile-friendly environment to view paystubs and other earning information, fill out their timecard, request time-off, and update their personal information. Your employees will appreciate the unified, easy-to-use interface, and your Human Resources (HR) and Payroll staff will appreciate the efficiencies of direct Vista integration.

KDS WEB PORTALS

• Add more value to your Vista environment
• A window to your Vista data
• Easy to install
• Never out of sync with Vista
• Training and implementation included
• Direct access support

“Using Keystyle for our benefits enrollment really streamlined the process. Our mobile workforce was able to efficiently elect benefits through the portal, saving loads of paper and time. The Keystyle team was responsive in helping us design, develop and implement our enrollment process. We felt like partners rather than just customers.”

- Jeff Pyles - HR Manager, FHG Inc.
Access Earnings

Give employees 24/7 access to their earnings documents. Employees can view their past paystubs, timecards, 1095C, and W-2 / Canadian T-4 in a secure web environment. This functionality is built right on top of your existing Viewpoint processes. You won't have to make any changes to your payroll process to enable this portal. No imports / exports whatsoever!

Your paystubs will be available retroactively, meaning that paystubs from before portal implementation will be available for your employees. Employees can retrieve documents by date range and even download multiple payroll documents at the same time.

Update Personal Information

Want to cut down on the administrative effort in keeping your employees' information current? The Personal Information module provides a structured means for your employees to view and request updates to their personal information in Viewpoint.

The Personal Information module integrates directly with the PR Employees and HR Resource Master, with auditing & approval workflows, and field by field customization—it even works with your user defined (UD) fields! Easily handle address changes, W-4 updates, cell phone, and email address changes, emergency contacts and more.
Request Time Off

Manage time-off on the web without using spreadsheets

Simplify the time off request and approval process. By leveraging Vista’s leave code balances and accrual framework, the Employee Information Portal adds the missing pieces needed to keep the vacation tracking process within Vista, and eliminates the manual request forms or outside systems that don’t tie into your Vista data. Our easy to use Request Calendar allows you to request time off by simply clicking the days you’d like to request, choosing a leave code to deduct from, and clicking “submit.” We also have support for vacation cash-out and non-paid leave if applicable.

"The construction industry is notorious for being behind with technology so searching for an employee portal seemed impossible. Finding the Keystyle Integrated Web Portal was a huge discovery for us. Allowing our employees to access a self-servicing portal relieved a huge burden from our HR and Payroll departments not to mention it was one of our quickest ROI projects to date."

- Chris Smith, Director of IT
Brayman Construction Corporation
Timecard Entry

Enter time directly to Vista

Easily enter time into a PR Timecard Entry batch in Viewpoint. The columns shown are editable by company and PR group, allowing for extensive customization to match the correct data fields with the varying employee groups within your organization. Lookup values pull directly from Viewpoint—you never have to worry about phases and jobs being out of sync with your current lists.

The portal has flexible submission and approval workflows that can link directly in with your Vista reviewer groups. You can also clone a previous week’s timecard to immediately prefill your current one.

Our timecard entry is also compatible with both Service Management (SM) and Mechanics lines types. You can also add user defined fields from your PR Timecard Entry form directly to the portal.

Additional features to supercharge this module: full mobile support (tablets, smartphones), start time / stop time tracking, expense input, and support for attachments directly on the timecard lines.

“The KDS Employee Portal, specifically the timecard module, helped us to transition to Vista smoothly and efficiently. As we like to say now - thanks to Keystyle, we are out of the Stone Age, finally! “

- Samra Bubalo, Senior Accountant, Bernards

Employee timecard entry online or on your mobile device.
Crew Timecard Entry

Enter bulk time in a customizable grid

Our Crew Timecard is another timecard entry option, that’s optimized for foreman input of multiple employees. This is our version of a ‘Pivot Table’ timesheet—simply select the fields you’d like to display in rows, columns and values, and watch your custom timecard come to life.

Our Crew Timecard enters directly into a PR Timecard Entry Batch, similar to our Individual Timecard and shares the same flexible submission and approval workflows. Job, mechanics, service lines are supported for entry. Additional features such as electronic signatures, daily / clone submission, and mobile device support make this a powerful timecard tool.
**Benefit Enrollment**

**Paperless benefit administration**

Benefit Administrators can use dashboard tools to review the enrollment status of their employees and ensure submission is completed. Upon review of submitted benefit changes, administrators can approve or reject requests. The approved elections automatically update Vista HR Resource Benefits with the correct deduction and liability amounts.

Take advantage of your Vista HR Benefit setup by allowing employees to select their plans directly on the web. Employees can review their current elections, submit life event changes, and complete open enrollment. The review process guides employees using four easy steps:

1. Verify personal information
2. Update and confirm dependents
3. Review available plan offerings and elections
4. Finalize selections, sign the form, and submit for approval

Benefit elections have full integration with Vista’s deduction amounts for each option, allowing employees to view the associated costs for their choices.
Office Tools

Mobile invoice review and approval

Our Office Tools suite includes web-based interfaces for:
- AP Unapproved Invoice Review
- AP Check Review

Simplify business tasks by extending your Vista data to the web. These tools make approving AP Invoices, reviewing checks, and routing department requests simple, by bringing key Vista data and attachment images together onto a single page.

AP Unapproved Invoice Review

Mobile-friendly invoice approval on a single screen

The AP Unapproved Invoice Review portal extends the native Vista approval process with an easy to use, web-based interface for accelerated invoice review and approval. Reviewers can login to the portal from any device that supports web viewing in order to complete the review process. The review process starts at the AP Invoice grid, which gives reviewers a complete look at all unapproved invoices for all companies. Clicking on any invoice opens the detailed invoice information, including the invoice images, right on screen. Reviewers have the ability to approve, reject, and comment on invoices. If administration allows, reviewers can even code invoices, add / remove line items, and add attachments.

"Approving invoices through the KDS Portal is such an improvement! It has provided a much nicer interface for our end users and added time savings for our Project Management team, especially when approving invoices from the field."

- Suzie Helmsworth - Business Systems Analyst, Sukut Construction
AP Check Review
Check validation made easy and digital

Our AP Invoice Review module allows controllers, auditors, and accountants, the ability to:

- Input a check range and instantly view the associated invoice and check images, vendor details, and reviewer history
- Reduce clicks and maximize efficiency using a single screen
- View reviewers and check images
- Integrate directly with your Vista data

Both processed checks and payment batches can be reviewed. Bring together this critical, repetitive data on a single screen to accelerate your review process.

“No longer did our A/P team need to presort paper invoices in the same check run sequence to affectively approve and sign weekly checks. Now, we simply enter a check run sequence and click through with confidence. Having the actual check images available in the portal is an added bonus that will finally allow us to complete transition to a completely paperless check and invoice environment.”

- Scott Sheperd—Controller,
  Broadway Mechanical Company

Web-based check approval
Manage Department Requests

Submit, review, and resolve employee requests

Need to track requests made to different departments? Customer service is always important, even when it’s between internal departments. This module allows employees to submit requests by department, giving the requester a clear picture of the request status, and the assignee an overall grid to better prioritize and take action. Department personnel have the ability to view the request on a dashboard, assign it to a member of their team, and track the item to resolution.

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Manage support requests
Field Tools

Direct integration with Vista

Our Field Tools suite includes web-based interfaces for:

- Safety checklists
- Daily logs
- Progress entry
- Purchase orders
- Project issues
- Billing compiler
- Outstanding billing review
- Job allocations / resource management

Extend your investment in Vista Project Management and increase your team collaboration with Field Tools. With these strategic modules, project teams can review, capture, and communicate job activities with the confidence that all their work will be captured in Vista. No syncing or custom bridges needed. Our tools correspond directly to the forms in Vista.

Safety Checklists

Create customized checklists to track safety plans

Walk the site and record findings with customizable checklists. Project teams can create templates that pull data directly from Vista (phases, jobs, equipment, etc.). Using the template builder, teams can design the checklist layout and response types. Checklists can then be filled out on a mobile device in the field and distributed to the project team directly from the portal. This module is also fully integrated with mobile image capture, allowing teams to snap and attach a picture of any issue they see. All checklists can be electronically signed, exported to reports, and downloaded to Microsoft Excel.

Make custom Safety Checklists

Multimedia content: "Make custom Safety Checklists"
Daily Logs
Capture all on-site events using Vista

Accurate daily jobsite records are critical to project success. Use Daily Logs to track site conditions, subcontractors, visitors, equipment, and other activities. Teams can capture this information on the web, right from their mobile devices. Snap photos of activities, dictate notes into your phone, and transform scribbles to professionally crafted reports all while walking the job.

“Keystyle's Daily Logs module is the most complete and tightly integrated product available for Vista daily reporting. Integration is important, and they got it right. Their knowledge of Vista really shows in their products. It has been extremely valuable for our field teams to have an accessible, responsive, easy-to-use interface for entering reports. We've been experiencing much greater reporting compliance after implementing their portal.”

- Adam Vella, IT Manager, Auld & White Constructors
Progress Entry
Capture daily production directly from the field

Progress entry allows users to record units completed in real-time on the web. Foremen, superintendents, and other users can quickly input daily work directly to a JC Progress Entry batch in Vista.

With accurate daily quantities, managers can review productivity by crew, outstanding units to complete on a job, and units to be billed. Taking advantage of this workflow, units complete are captured in the field, and transferred directly to the progress billing when initialized.
Purchase Orders
Purchase Order Receiving

The best time to record that you received the materials is as soon as they are delivered. Using the Purchase Order (PO) Receiving module, users can record units delivered, capture images of the receiving ticket, and post the data directly to Vista. All this can be done directly from a mobile device.
Purchase Order Quick Create

Getting a PO on the go can be a hassle. PO Quick Create is designed to allow users to create a PO from Vista in seconds. Users can then modify the purchase order and add costing information. All these modifications can be done right from your mobile devices.

Purchase Order Dashboard

The Purchase Order dashboard allows users to manage the entire purchase order workflow. Portal users can select jobs they have access to, and review the PO assigned to it. The dashboard displays the actual cost, committed cost, and remaining committed costs. Users can also download a PDF of the PO.

In addition to this review, users can create POs, PO requests (requisitions), and material requests. Administrators can assign different roles to users to ensure that users only have access to the functions assigned.

New PO creation enables users to create PO headers with cost detail, posted directly to Vista. Supported cost line types include job, inventory, expense, equipment, and work order. Users can choose information from any of the drop down fields and pull directly from the Vista lookups. When finished, users can click submit to validate and post the PO batch in Vista.

Purchase Order requisitions can also be entered into the portal. By entering header information and cost information, users are able to submit requests that can be reviewed by a purchasing department before a PO is issued.

Material orders can be entered when users wish to take advantage of the Inventory module in Vista. These orders are written against jobs and costed accordingly.
Purchase Agent Dashboard

Purchasing departments now have a one-stop location to review all PO requests. From this dashboard, the purchasing agent can bundle multiple PO requisitions into a single purchase order. Using the filter tools, agents can quickly find and group together the requests as needed. They can also apply unit costs and select a vendor before creating the PO.
**Project Issues**

Log, communicate, and resolve jobsite issues

Walking the jobsite often reveals issues that need to be recorded and tracked. This module allows these issues to be captured on a mobile device in real-time. With voice recording, users can take notes about the issue, and take images directly from their mobile devices. The data is saved directly to Vista's PM Project Issues.

Project teams can review issues on a grid to ensure all exposures are managed properly. If required, teams can convert the issue in Vista to an RFI or change order for further processing.
Billing Compiler
Bring together billing documents, job cost detail, and attachments into one billing package

The Billing Compiler makes creating a bill package a snap. You can take both the G702 and G703 and combine them, adding a cover sheet of job cost detail showing your owners exactly what the costs for the billing period were. The compiler also adds all associated attachments behind each of their respective phase codes (AP invoices, receipts, job cost adjustments, etc). No more spending hours collecting, collating, and combining job cost documents together. Take advantage of all the paperless work the team has already done and create bid packages in minutes.

Outstanding Billing Review
Track, comment, and review open contract billings

Project teams now have quick overview access to contract billings via the AR Billing Review. This module allows the project teams to group, sort, and review all invoices assigned to the jobs they manage. Project members can comment and track all open billings, and all comments are stored directly in Vista's AR Credit Notes form. Accounting has the ability to see all notes on the contracts using a log that shows which member of the project team is assigned to the invoice, opening up communication channels.

“Keystyle Data Solution's Billing Compiler has significantly reduced the time and effort involved in generating invoices, combining reports, and gathering associated backup attachments with Cost Plus or T&M jobs. It has cut our billing time on T&M jobs down 60%. Now that we've used this significantly - it would be hard to imagine living without it.”

- Adam Vella - IT Manager, Auld & White Constructors
Job Allocations & Resource Planning

Manage employee, equipment, asset assignments

Looking for a realistic way to track which employees are working on which job? Our Job Allocation module provides a quick grid to associate employees, equipment, and assets with a given job.

These associations can then be used to:

- Analyze resource availability by craft, equipment category, asset type
- Budget total labor hours by job
- Show aggregate resource availability / needs
- Restrict the jobs that a given employee can charge to
- Populate jobsite directory reports
- Provide job information on employee profiles
- Build employee resumes and skills
- Feed capacity planning metrics based on employee assignments and job dates

As an option, the portal can automate the job security connection in Vista; as you assign employees to jobs, their job security is automatically updated.
Problem Solving Add Ons

In addition to our core modules, KDS also offers some powerful add-ons designed to solve specific business processes. All these solutions fit into the larger KDS portal framework and can be enabled at any time.

We make our products to simplify your workflows and adapt to your current ones. We can and have created custom solutions for our clients on a case by case basis.

Document Library

Distribute and track documents, bulletins, and training material

Company documents can be difficult to distribute, categories, and track—especially when signatures are required. Take your documents to the digital environment with the Document Library. Administrators can easily publish company handbooks, employee notices, bulletins, department documentation, and a variety of other documents.

These documents can be distributed and tracked using the following distribution options:
- A company bulletin, which is shown on the front page as employees log in
- A document requiring employee acknowledgment or signature
- A library item, which is a categorized resources for your employees

When a signature is required, employees can digitally sign the document on any web enabled device.

Administrators can review a grid to track the signing status of the document. This grid can be exported to Microsoft Excel for additional analysis. Administrators can also create library categories and categorize documents for employees to review. Common categories include department setups including estimating, operations, accounting, and HR. With the dynamic user group "builder", administrators can pinpoint exactly who should be seeing and receiving the documents.
Timecard Safety Net

The loss of timecard data during payroll crunch-time can be devastating. In fast-paced, deadline-driven situations, mistakes can happen—employees can delete lines from their timecard, or worse, an entire batch.

The Timecard Safety Net silently captures all items that are deleted from Timecard Entry batches, including, but not limited to, portal timecard entries. In the event that anything happens to the information in a timecard entry batch, the safety net can be called up from the portal to restore the timecard data to an existing batch. The safety net will allow for entire batches or specific lines from a batch to be restored.
About Us

Keystyle Data Solutions was formed in 2013 with the goal of simplifying construction business processes.

The idea began in 2011, while founders Michael Smith and Kevin Fisher were leading the Vista implementation at a large construction firm. Michael and Kevin realized that they needed a way for employees to have electronic access to their earnings documents, and as a result, came up with a web platform to extend Vista data to everyone, across all devices. Now at Keystyle Data Solutions, KDS' scope has expanded to include a full employee self-service portal, field modules, and beyond—giving employees easier and more accessible ways to experience Vista.

Guided by customer feedback and requests, KDS is continuing to refine its products and expand its feature set. Since the initial launch of the portal in 2014, over 115 companies in three countries have introduced the KDS Self-Service portal to their Vista environment.
Pricing

Our pricing is a flat monthly per user price that includes:

- Installation and configuration
- Training
- Direct-access support
- Updates to ensure future Viewpoint version compatibility
- New feature releases
- Guided implementation included at no cost
- No long-term contract
- Minimum monthly service charge is $100 / Month
- Discount for using multiple portals!

### Employee Self Service Portal

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<thead>
<tr>
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### AP & Field Portals

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**Contact Us**

Give us a call or send us an email for more information about our services and products.

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