e

Ticketing Application

Manual
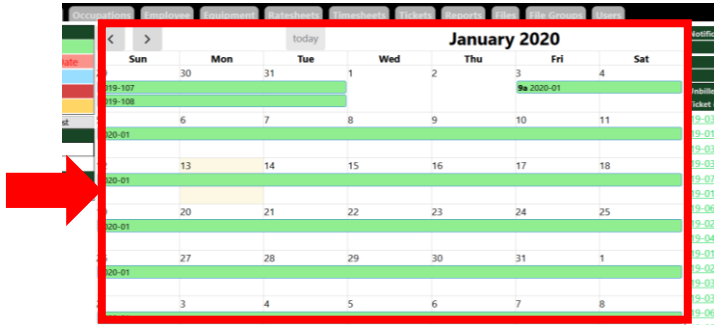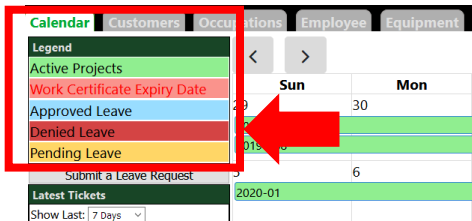
Contents

***Please note if you do not see certain areas discussed in this manual, they may only be visible with Administration access. ***
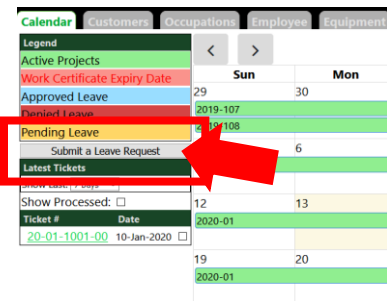
Calendar

The Calendar can be viewed in the Center of the screen.

The calendar contains active projects, vacations, and expiring work certificates as shown by the legend on the left hand side.
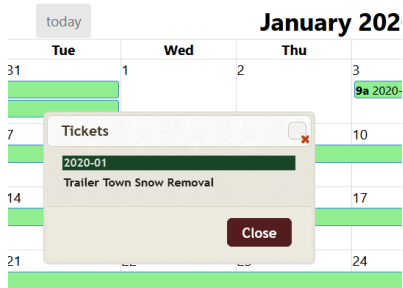

Below the legend is a submit leave request button

Using the Calendar

Clicking on a day will show projects and tickets for that day. Clicking on a project will show the tickets for the project for that day.

Clicking on a vacation will allow you to view the information.

If it is your vacation or you are a vacation manager you will be able to edit it, if the date is in the future.

Submit Leave Request

1- **Click on Submit Leave Request**
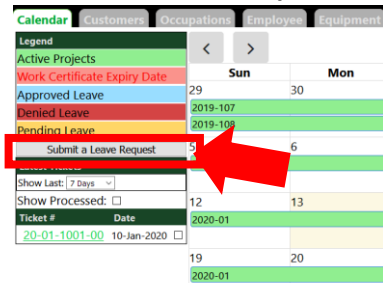
2- **Select Leave Type from Drop Down options are;**
   a. **Vacation**
   b. **Sick**
   c. **Maternal/Paternal**
   d. **Others**

3- **Enter in the Dates required from and To**
   a. **Ensure the Time is entered as required**

4- **Enter in any comments needed**

5- **Click on Submit**

Notifications

On the right-hand side of the Calendar you will see the notification section.

1- **New**

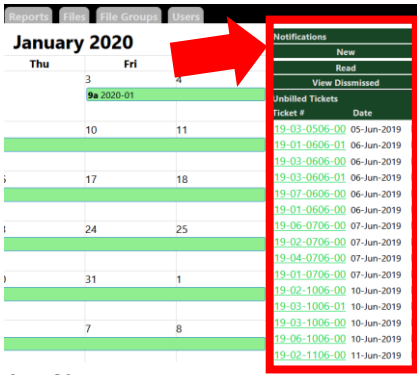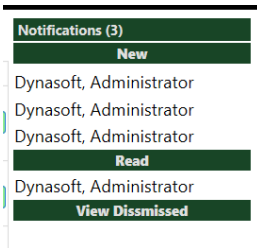   a. **In this section you will find new unchecked notifications for leave request updates and file uploads.**
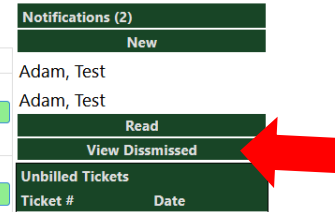
2- **Read**

    a. **This area is where you will find notifications that you've already seen but haven't dismissed yet.**

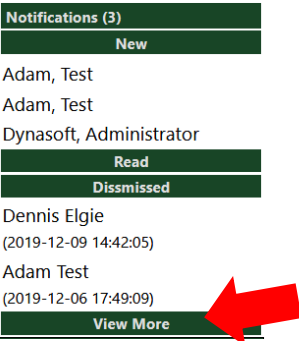3- **View Dismissed**

    a. **This area is where your dismissed notifications end up.**

Clicking view dismissed will show recently dismissed notifications.

Clicking view more will show more dismissed information

Below the notification area are the unbilled tickets section but more on that later.

Approve or Deny Leave Request

Example; Adam, Test submitted a Leave Request

The request will appear under Notification "New"

Notifications (2)
New
Adam, Test
Adam, Test
Read
View Dissmissed
Unbilled Tickets
Ticket #   Date

If you click on the "Adam, Test" notification under "New" a Popup will appear displaying the notification details.

Notification
From: Test Adam
Upload Date: 2020-05-12 10:01:42
Comments: Leave Request
Pending

Dismiss   View   Cancel

Clicking "Cancel" in the "Notification" window, will move the notification to the "Read" section in the notifications list.
Clicking "Dismiss" will dismiss the notification and move it to the dismissed section.
Clicking "View" will bring up a different window showing the details of the vacation.

Leave Request
Employee: Adam, Test
Leave Type: Vacation
From: 05/13/2020   08:00 AM
To: 05/13/2020   05:00 PM
Comments: Just an example.

Delete   Approve   Deny   Cancel

Vacation Managers are able to Approve, Deny, or Delete the leave request.
Clicking any of the 3 options will notify the user that their leave request was updated.

You can now approve or deny the Leave Request by clicking on the corresponding button.

The Vacation Date can be edited only if the date is in the future

The second one in the list under the "New" section is a file which was uploaded by administration

Notifications (2)
New
Adam, Test
Adam, Test
Read
View Dissmissed
Unbilled Tickets
Ticket #   Date

1. **Click on Adam, Test to view the notification.**
2. **Clicking on the File; in this case it is "Fortunelocation.PNG"**

3. Depending on the browser you are using, it will download the file, or ask what you want to do with it.
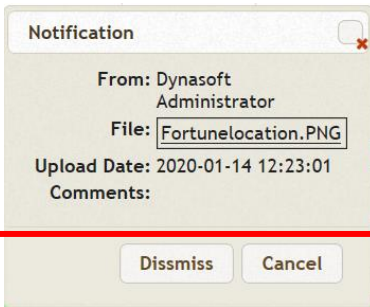
Clicking cancel will move the notification to the read section.

Clicking dismiss will move it to the dismissed section.

Unbilled and Latest Tickets

Placing a checkmark on any tickets in either the processed or unbilled ticket sections on the left and right sides of the calendar will set those tickets to processed and billed respectively.

Customers

Adding a new customer

Click the "Add" button next to the Customer select field to enter add mode.

To exit add mode click the cancel button next to save.

In Add mode you are presented with a blank form.

1. **Fill out the customers information**
2. **Select a Default Ratesheet from the ratesheet dropdown list**
   a. **This will be the ratesheet applied to all projects by default. This can be changed in the project section.**
3. **Fill out Primary contact information**
4. **Add any secondary contact**
   a. **Start by typing the contact name in the contact column. A new line will be added where you can add the email and phone number. Of the secondary contact.**
5. **Add a project to the customer**

   a. Similar to adding secondary contacts, start typing a project name and a new line will be added to fill in the rest of the information.

   b. Note that all fields are required for the project line to be saved.

  6. When finished click the save button

Editing Customers

  1. Start by selecting the customer you want to update.

  2. Change update the customer info.

  3. Hit "Save" button.

   a. You will be notified of any error if any.

   b. All fields must be filled out for that project line to be saved. All other information will still be updated.

Applying Default Ratesheet to Customer

1- Click on the Customers Tab

2- Select Customer from Drop Down Menu

3- Click on the drop down Menu for Default Ratesheet

4- Select the rate sheet from drop down menu
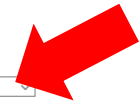
5- Click on save

Adding default Ratesheet to Customer successfully completed

Projects

- **Project #: This number is unique to each project. First 2 digits represent the year it is created in followed by the current number of projects created in that year.**
- **Name: The name given to the project.**
- **Location: The location the project takes place.**
- **Province: The Province the project takes place. Note this field determines what province timesheets will be assigned. Ex. Example Project is in AB, any timesheet submitted for this project will be assigned as an AB timesheet.**
- **Manager: This is the customer's manager. (In a future update this may be a dropdown list of customer contacts to choose from.)**
- **Fortune Project Manager: This is the Fortune employee assigned to this project.**
- **Description: A selection of pre-defined options of descriptions.**
- **Proposal Number: Is an auto generated unique number. Similar to the Project # except it contains the full year and can be changed.**
- **Status: This is the project status there are different options to choose from, changing this option will change how they appear in the calendar.**
- **Start Date: This is the starting date of the project. This determines the starting point of the project in the calendar.**
- **End Date: Similar to Start Date, but determines the end point of the project in the calendar. The project will span from the Start to End dates.**
- **Ratesheet: This is the ratesheet selected for this project. All tickets filled out for this project will have this ratesheet selected by default. If default is selected it will default to the customers Default Ratesheet.**

- **Value: This is a budgetary value assigned to the project. This number will appear in the Ticket reports when this project is selected.**
- **Contract: This marks the project as a contract. All tickets assigned to this project won't appear in the general ticket report.**
- **Internal: This marks the Project as an internal project. Ex. Shop, or Administration. Time sheets assigned to this project will have a mandatory comments field added to the timesheet. Timesheet reports will show time sheets assigned to this project as "Shop Time".**
- **Archived: This marks the project as archived, when archived the project will no longer be selectable on tickets and timesheets.**

Applying Ratesheets to specific projects

Generating folders for new projects

The Generate Folders for new projects box is checked by default.

When a new project is created project folders will be generated under the "Files" tab.

The Parent folder is named after the proposal number followed by the project name and customer name.

Project Descriptions

Adding to the list of project descriptions.

1. **Go to the customers tab click the add button on the right-hand side under the project descriptions header.**
2. **Type in the new description and click save.**

Removing a project description.

1. **Select the description you wish to remove.**
2. **Click edit**
3. **Click delete.**
4. **Note if this description was assigned to a project the description text will include the recently deleted description. To remove from the project description click the description field in the project line and click save.**

Setting the description for a project.

1. **Select the description field in the project line you wish to edit.**
2. **Select all descriptions that apply to the project.**
3. **Click save.**

Occupations

Occupations are used to add more information to tickets.

The default rate and overtime rates are used in Legacy tickets only.

Adding an Occupations

Click the "Add" button to enter add mode.

Occupations

Occupation: Administration　▾ | Add | Update | Delete | ☐ Show Inactive Occupations

1. Enter Occupation Name
2. Enter Default Rate and Default Overtime Rate for the new occupation
3. Hit Save

4. To exit add mode without saving click the "Cancel" button.

Editing Occupations
1. Select the occupation you wish to edit.
2. Update any information.
3. Click the "Save" button.

Setting an occupation to inactive removes it as an option under the employee tab and the tickets tab.

Re-activating inactive occupations:

1. Check the "Show Inactive Occupations" box next to the "Delete" button.
2. Select the occupation you wish to re-activate.
3. Uncheck the inactive box below "Default Rate".
4. Click the save button.

Employee

Employee tab is where you manage the employees registered into the system.
Things that can be done here include:

- Setting the employee information like Name and Email.
- Managing the occupations available to the selected employee.
- Managing their work certificates.

Adding an Employee
1. Click the Add button

2. Fill out the Employee information below.
3. Hit the "Save" button.

Other Employee Options
- **Inactive: Sets the employee to inactive and disables their login if they had one.**
- **Time Manager: If this is checked the selected employee will be able to be set as a supervisor on timesheet submissions.**
- **Vacation Manager: If this is checked the selected employee will receive notification for submitted vacation requests and will have the ability to approve, deny and delete vacations.**
- **Job Supervisor: If this is checked the selected employee will appear as a supervisor under the jobs tab.**

- **Automatic Time Management: Checking and setting the value in this box will automatically add time as a time sheet to Daily Hour reports.**

Employee Occupations

The occupations section of Employee is where you manage occupations that are assigned to the selected employee.

Assigning occupations to Employees:

1. Select the employee you wish to add occupations to
2. Select the occupation to add
3. (optional) Set the rate for this specific employee if needed
4. Click "Update" button

Work Certificates
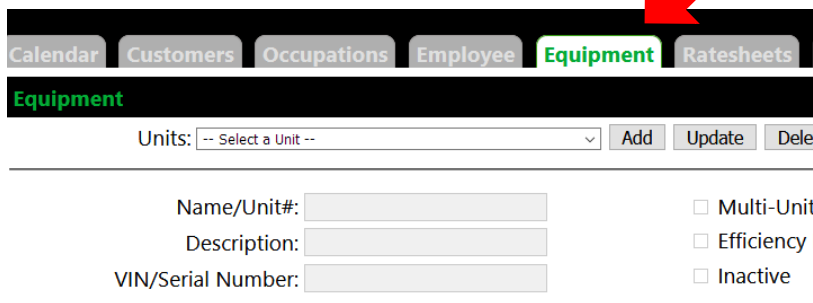
1. **Select the employee you wish to add certificates for.**
2. **Start typing in the name of the certificate and a line will be added to add the rest of the information.**
3. **Set the grade of the certificate. (Optional)**
4. **Set the issue date**
5. **Set the Expiry date. Tickets will appear in the calendar on their date of expiry.**
6. **Upload a scanned version of the certificate.**
7. **Click the "Update" button**

Equipment

This is where you manage your equipment and how they are classified using memberships.
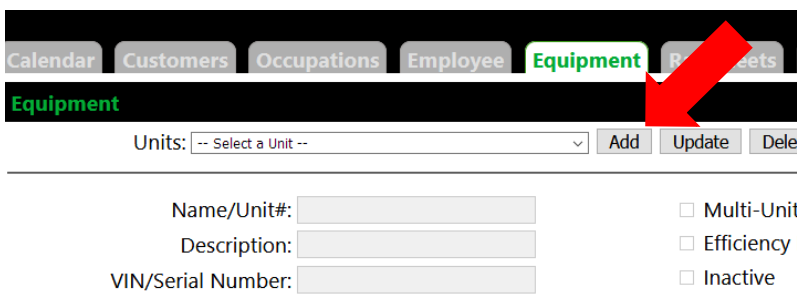
Adding Equipment

1- **Select the Equipment Tab**

2- **Click on Add**

3- **Enter in the details of the equipment**

4- Click Save

Equipment Options

1- Equipment Options;
   a. Marking the equipment as a "Multi-Unit" allows it to be selected as a secondary unit on tickets
   b. Marking a unit for "Efficiency Report" makes it appear on the equipment hours report
   c. Marking a unit as "Inactive" will make the unit unable to be assigned on tickets and will hide it on the equipment reports.
   d. Remember to click update when done changing equipment options.

Marking Equipment as Inactive

***Please note;** Marking a unit as "Inactive" will make the unit unable to be assigned on tickets and will hide it on the equipment reports

1- Click on Equipment Tab

2- Select Equipment from Drop Down Menu

3- Click on Inactive

4- Click on Update

The item is now inactive

To Mark Equipment as Active

1- Click on Equipment Tab

2- Click on Show Inactive

3- Select Equipment you want to make Active from Drop Down Menu

4- Click on Inactive

5-   Click on Update

Your equipment is now reactivated

Equipment Documents

You can add documents to equipment. For example, "Bill of Sale" or "Insurance".

1. First select a Unit you wish to add documents for.
2. Select the category that best fits the document you wish to upload.
3. Enter a document name, issue and expiry date.
    a. If document has no issue or expiry date, check the boxes next to the date fields.
4. Upload the file.
5. And click the update button at the top of the screen.
6. Changing the category of the file
    a. Check the box next to the document you wish to move.
    b. A new category select box will appear next to the selected category.
    c. Select the new category.
    d. And click update.
7. Changing the name or the dates for a document.
    a. Click the name of the document.
    b. A popup will allow you to edit what you need.
    c. Enter the values you wish to change
    d. Click save in the popup.

Membership

If entering in the ratesheet and you do not see the item you are wanting to assign rates to, please check that the Membership for this specific item was added.

By adding Membership to the Equipment this will allow the item to show up and be selected in the ratesheet to review the steps please visit **"Click on Add Membership"**

Add Membership

5-   Click on Add Membership

Adding Membership to equipment will allow the item to be show up in the list for the ratesheet

After clicking on Add Membership it will show that the equipment is a "Member of" as shown in image below;

6- **Click on the Primary Rate and select item from the drop down menu;**

7- **Click on Select Category**

8- Select Category from drop down list and select appropriate category

9- Select Subcategory from drop down list

10- After selecting, it will appear as follows;
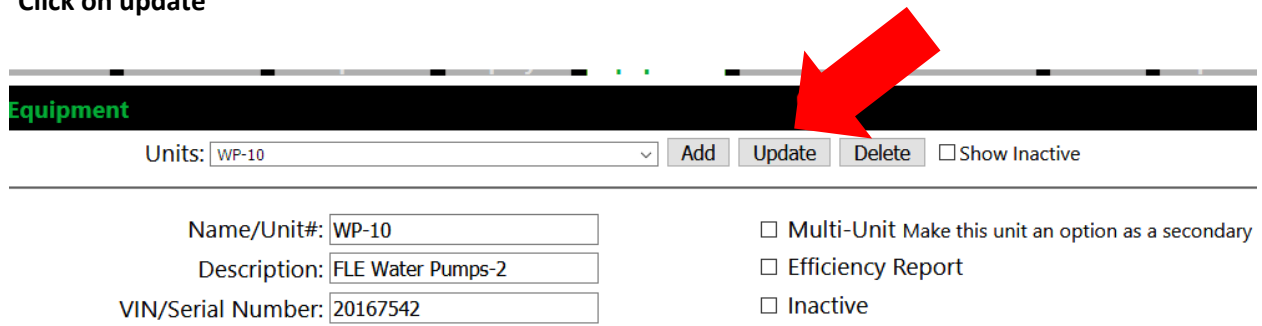
11- Click on update

Congratulations you have successfully added the equipment.

If you do not see the category or subcategory you want to select, this specific subcategory needs to be added in the Memberships section below. Step by step instructions can be found in the "Add Category" and "Add Subcategory" sections respectively.

Add Category

In this section we will add a main category which will allow you to enter in codes

1- **Click on Ratesheet after logging into your application**
2- **Scroll to the section where it reads Classifications**
3- **Click on Add**

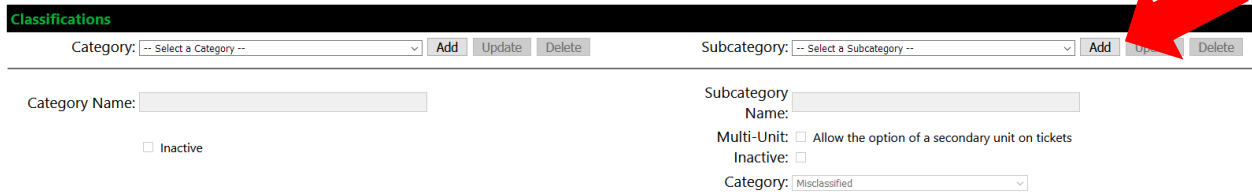4- **Type in the name of the Category**

5- **Click on Save**

You have successfully added a new Category

Adding a Subcategory

This section will add the subcategory for your parts

1- Click on Add

2- Type in the Subcategory name
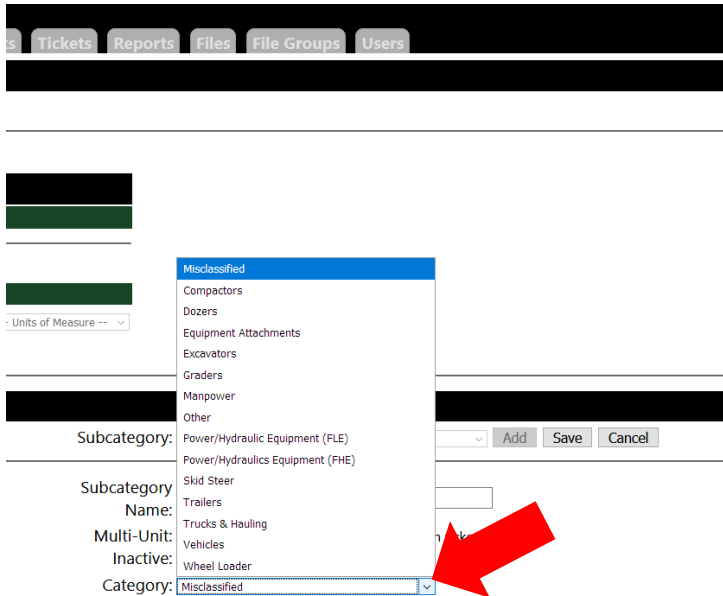
3- Click on Save

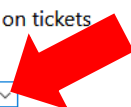### 4- Select the Category from the dropdown list

**For this example, we selected Trucks & Hauling click on the category item you wish to select
After selecting this category, it will appear as per example below;**
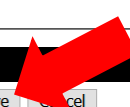
Subcategory: -- Select a Subcategory -- ⌄   Add   Save   Cancel

Subcategory Name: Tandem c/w Tri-Axle Equipment Trailer

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Trucks & Hauling ⌄

5- Click on Save button

Subcategory: -- Select a Subcategory -- ⌄   Add   Save   Cancel

Subcategory Name: Tandem c/w Tri-Axle Equipment Trailer

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Trucks & Hauling ⌄

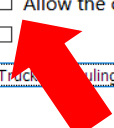**If the subcategory has a Multi-Unit that needs to be attached please ensure you put a check mark in the Multi-Unit box**

Subcategory: -- Select a Subcategory -- ⌄   Add   Save   Cancel

Subcategory Name: Tandem c/w Tri-Axle Equipment Trailer

Multi-Unit: ☐ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Trucks & Hauling ⌄

After Checking the Multi-Unit box please ensure to click on update

Subcategory: Crew Truck ⌄   Add   Update   Delete

Subcategory Name: Crew Truck

Multi-Unit: ☑ Allow the option of a secondary unit on tickets

Inactive: ☐

Category: Vehicles ⌄

You have successfully added a Subcategory

Ratesheets

Adding and viewing current Ratesheets and rates

1- To View current list of Ratesheets click on the drop down arrow;
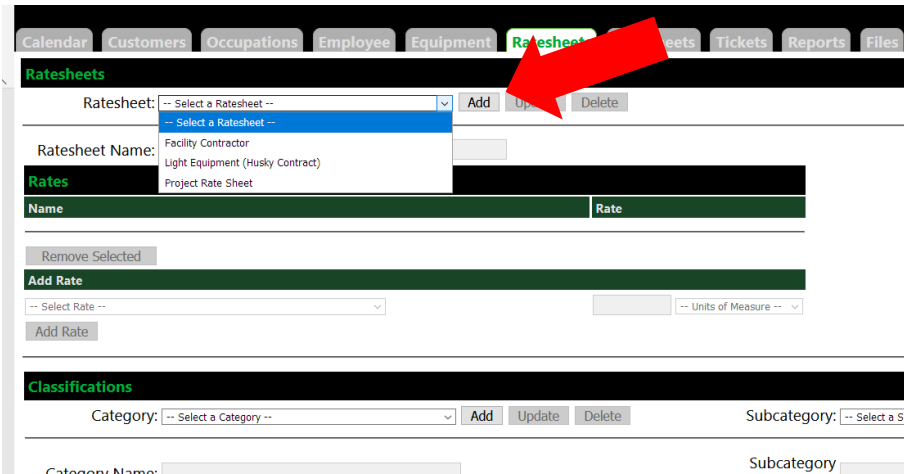
2- You now see a list of Rates on the left and Other rates on the right.
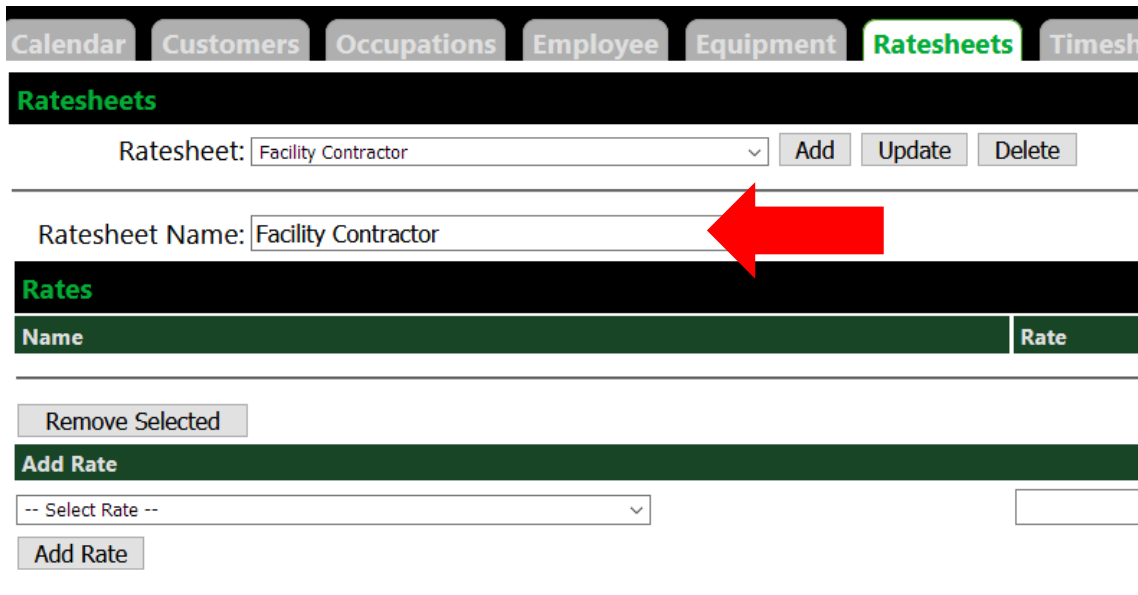
Add a new Ratesheet follow the following steps;

1. **Click on add**

2. **Type in the name of the Ratesheet**

3- Click on Save

Your new Ratesheet page has been created, the next section we will review step by step on how to add Rates.

Adding Rates

1-   Select Rate Sheet from Drop Down List
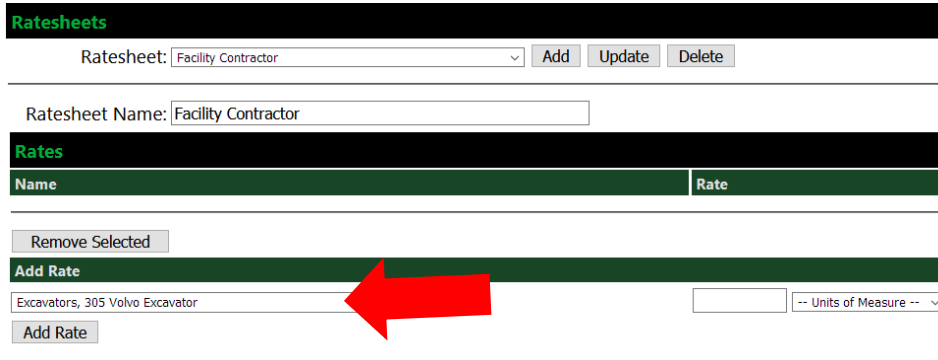
2- Select Rate from drop down menu
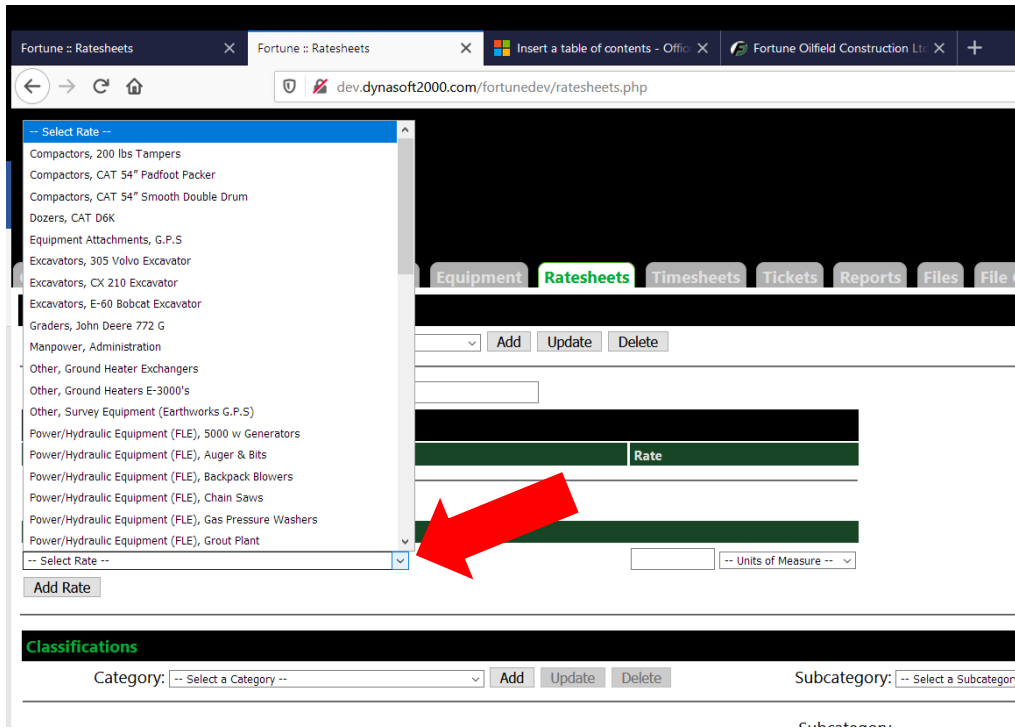

3- Select the item you would like to add

In this example we will select the Excavators, 305 Volvo Excavator

4- Enter in the amount of the rate being charged as shown in Example;

5- Select the unit of measure from the drop down menu (month, day, hour, km or %)

6- Click on Add Rate

The items you have added will now appear under rates;

7- Click on Update to save the entries

Ratesheets

Ratesheet: [Facility Contractor ▾] [Add] [Update] [~~elete~~]

Ratesheet Name: [Facility Contractor]

Rates

Name	Rate
☐ Vehicles, ATVs	$16 /hour
☐ Vehicles, Crew Truck	$29.5 /hour
☐ Vehicles, Water Trucks	$209 /day

Congratulations you have successfully added rates

Don't see a rate you wish to add? It must first be added to a unit as a membership.

Duplicate Entry in Ratesheets

Entered in the wrong information? or duplicate entry? Follow these steps to correct the entries;

1- **Review the list of entries**
2- **Find the equipment you would like to remove**
3- **In the example below the PHE (FHE) Loader Pallet for $20/day needs to be removed**

☐ Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple $20 /day
☐ Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple $45 /hour

4- **Put a check mark in the box beside the equipment you want to remove;**

☑ Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple $20 /day
☐ Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple $45 /hour

5- **Click on Remove Selected;**

☑ Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple $20 /day
☐ Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple $45 /hour

Remove Selected

6- **Click on Update**

Ratesheets

Ratesheet: Facility Contractor   Add   Update   Delete

Ratesheet Name: Facility Contractor

Rates

Name	Rate
☐ Vehicles, ATVs	$16 /hour
☐ Vehicles, Crew Truck	$29.5 /hour
☐ Vehicles, Water Trucks	$209 /day

Congratulations you have successfully removed the rate entered incorrectly or duplicate entry
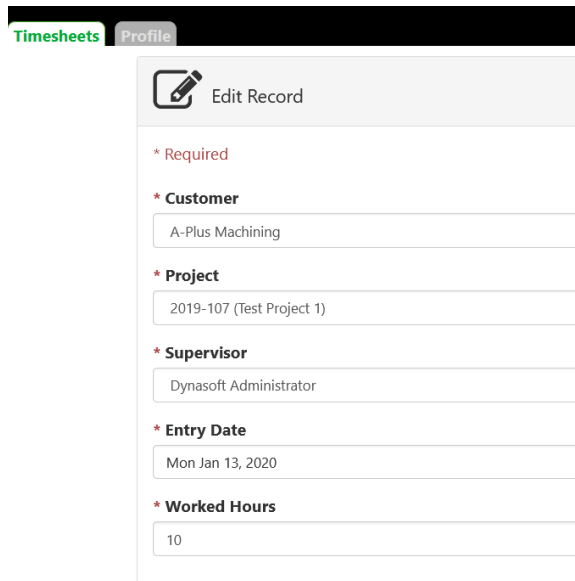
Timesheets

Add Timesheets as Employee

1- **Click on Timesheets**
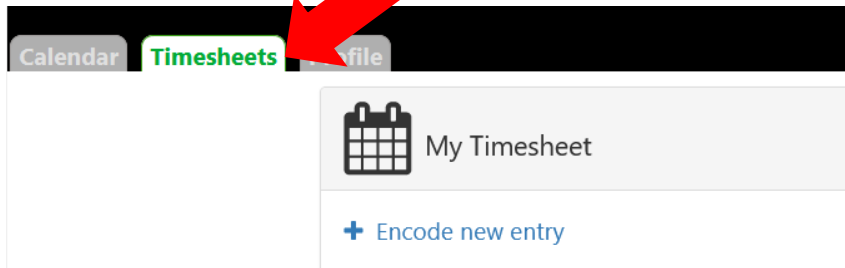
2- **Click on Encode new entry**
3- **Fill out your information for each field by selecting the appropriate drop-down selections for**
   a. **Customer**
   b. **Project**
   c. **Supervisor**
   d. **Select the appropriate Entry Date**
   e. **Type in the numeric amount of hours you worked**
   f. **If your project is considered shop/internal, a comment field will appear that must be filled out as well.**
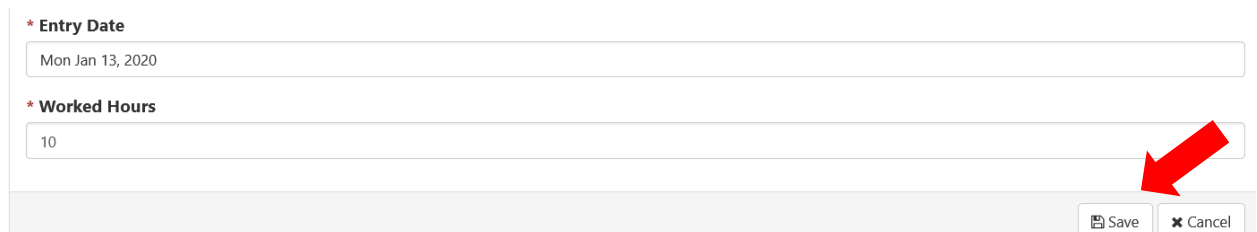
4- **Click on Save**
   Note: filing a timesheet for a past date will submit a change request

Edit Timesheets as Employee

1-   Click on Timesheets Tab

2-   Click on the Timesheet you would like to edit

In this example we want to edit the hours worked for the top entry

Click on the January 13th, 2020 line with 10 hours worked

3-   Click on edit

4-   Edit the information needed

5- Click on Save
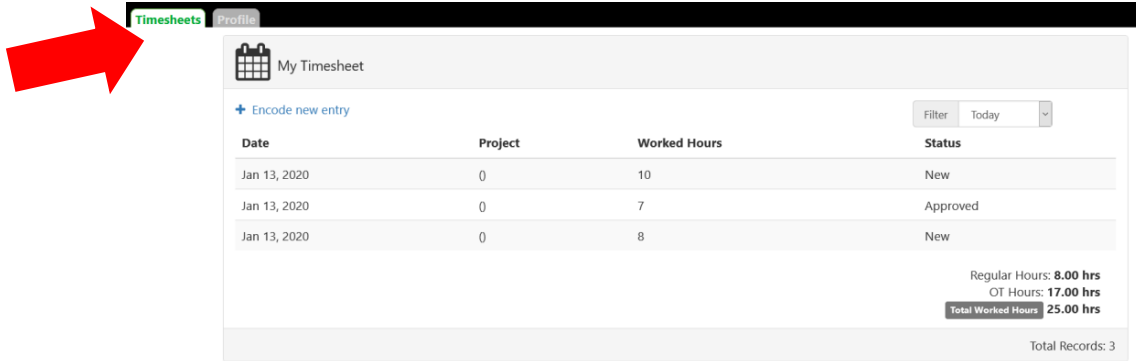
6- Change requests

If the timesheet is being entered for a past date or changing an approved/denied timesheet, a change request will be submitted.

Delete Timesheets as Employee

1- Click on Timesheets Tab

2- Click on the Timesheet you would like to edit

3- Click on Delete

4- A popup will occur asking "Are you sure to delete this record?"
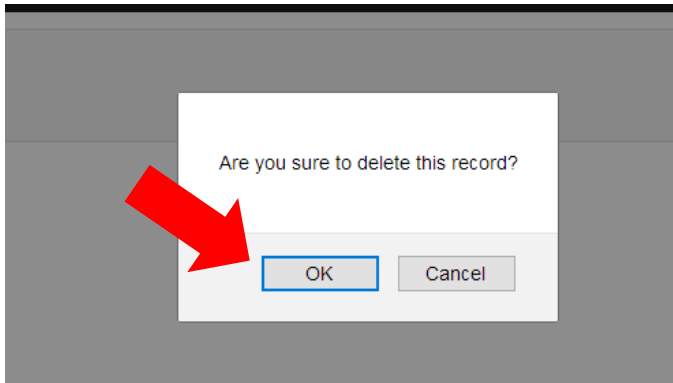
If you are sure click on OK

If the Timesheet has been approved and you are editing or trying to delete the entry you made a popup will show as follows;
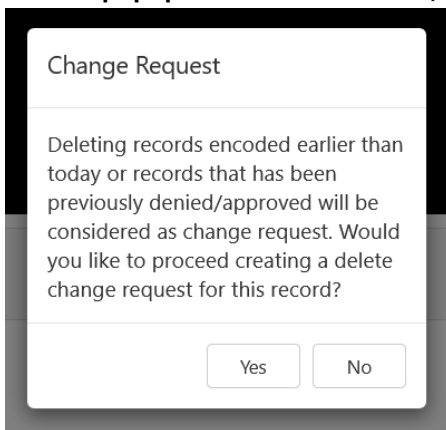
Click on Yes or No as required
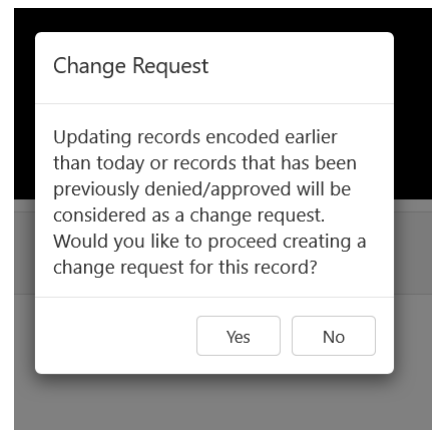
If a timesheet has been entered for a date in the past a change request will be submitted to Admin.

Reviewing Timesheets as Administrator
1- **Login as Administrator**
2- **Click on Timesheets Tab**
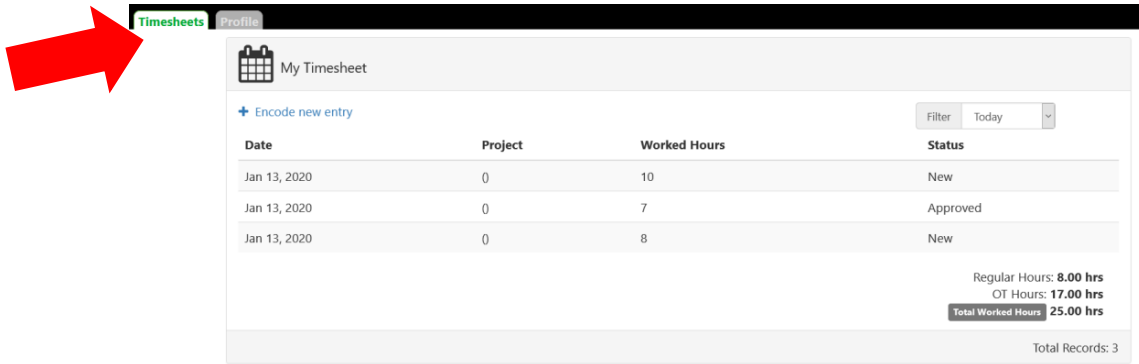
3- If Employees have timesheets entered you will see "There is 1 employee waiting for your approval"

   a. Click on "There is 1 employee waiting for your approval"
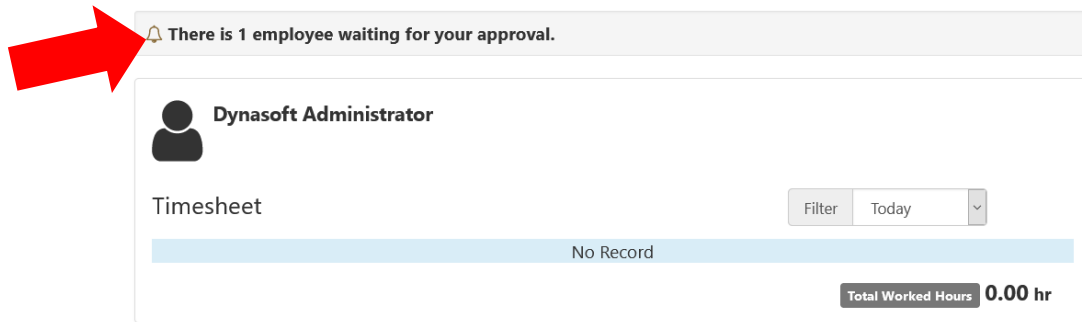
4- You will be able to review the hours and Approve or Deny the entry
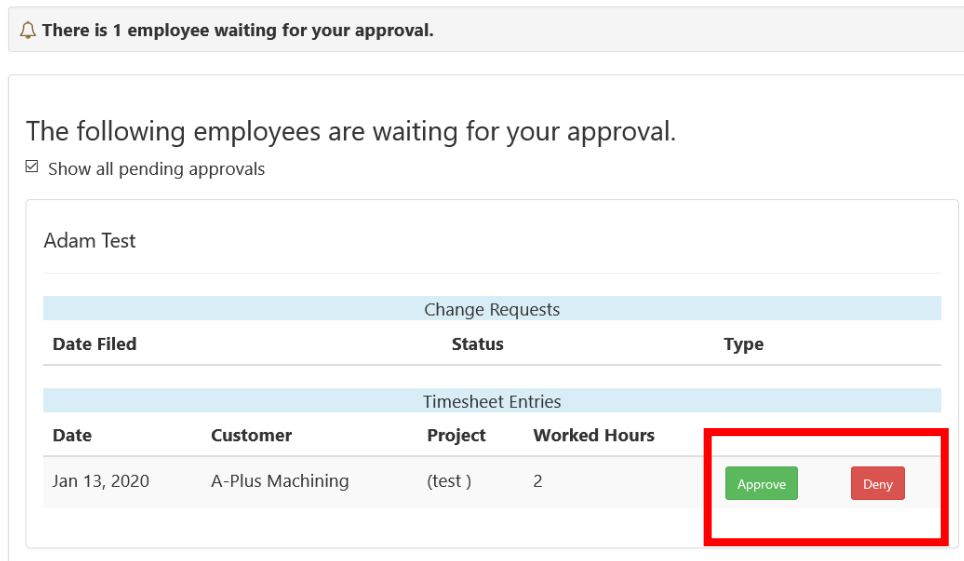
If an employee has edited or tried to delete an entry after it has been approved you will also receive the "There is 1 employee waiting for your approval"

If a Employee has entered their timesheet for a date in the past a change request will be submitted to Admin.

Tickets

Add Tickets

1- **Click on Tickets Tab**
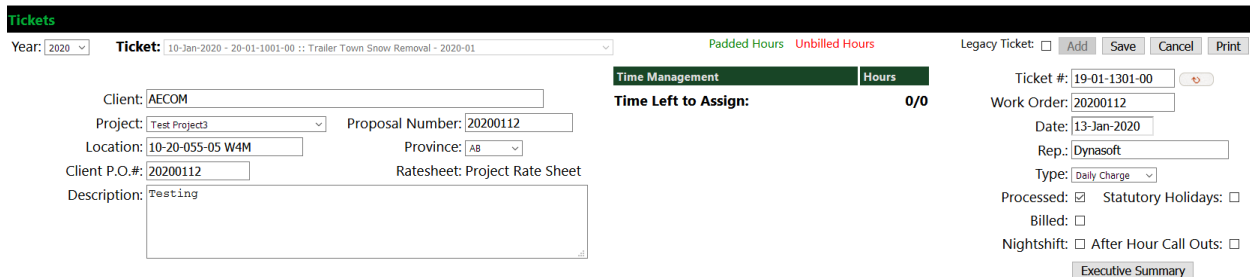
2- **Click on Add**

3- **Start Typing Clients name and select Client from list**
4- **Select Project from dropdown list**
5- **Enter in Proposal Number if one has been provided**
6- **Enter in Client PO# if one has been provided**
7- **Select Date**
8- **Enter in Rep if required**
9- **Select Type from Drop Down Menu**
10- **How the ticket will be processed**

Once the above fields have been filled out your screen should appear similar to below
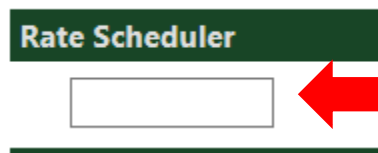
11- **Click on Save**
12- **Under the Rate Scheduler enter in Unit # for this example we will use 511 and Truck Pups**
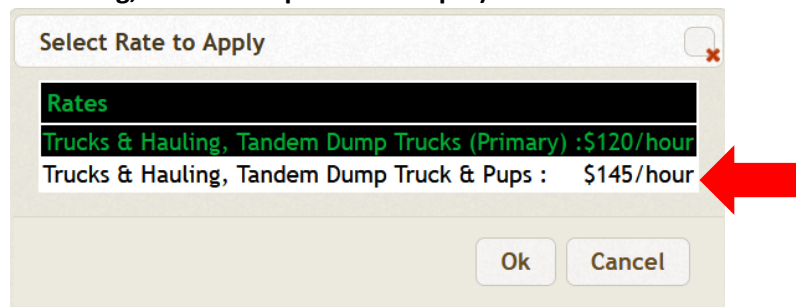
   a. **Click on empty box under "Rate Scheduler"**

   Enter in the Unit Number – For this example it was 511

   b. **Hit the Enter Key on your keyboard**

   c. **Popup will occur select the option required (for this example we will select the "Trucks & Hauling, Tandem Dup Truck & Pups")**

d. **Once you have the selection highlighted you would like to utilize click on ok**

e. **A second box will appear to the right (this is where you add "additional equipment" mainly trailers, pups, enddumps)**

f. **Type in Additional Equipment number (For this example we used T200)**

g. **Select Employee from Drop Down list**
h. **Select Occupation from Drop Down list**
i. **The QTY and Rate Box will now be editable**
j. **Enter in the QTY**
k. **Select the Drop Down list for Rate /none, /month, /day, /hour, /km, /% and select the best option for this entry (for this example we left it at /hour)**

Rate Scheduler	Employee	Occupation	Qty	Rate		Total
☐ Trucks & Hauling, Tandem Dump Truck & Pups:511 T200	Administrator, Dynasoft	Administration	1	145.00	/ hour	145.00
	-- Select an Employee --	-- Select an Occupation --	0	0.00	-- Rate --	145.00

l. **Under the Cost Plus Rates (in this example we show box filled out)**
Dynasoft went to purchase 5x Plywood from nelsons at the cost of $150 per sheet.
Dynasoft called R&D Plumbing and Fortune were charged $1500 for 1 hour

   i. **Select from Drop Down menu (Materials & Rental Equipment, or Subcontractor Labor**
   ii. **Under the Description entry (start typing Plywood, a list of options will appear and select the best one by click on the entry)**
   iii. **Click Tab on your keyboard to get to next section QTY, enter the QTY required**
   iv. **Click Tab on your keyboard to get to next section Rate Change the Rate if needed**
   v. **Use your mouse to click on the drop down list if needing to change it from /Hour to one of the other options.**

Cost Plus Rates	Description	Qty	Rate	Markup		Total
☐ Materials & Rental Equipment	Plywood (nelsons) P	5	150.00	15.00	/ %	862.50
☐ Subcontractor Labor	R&D Plumbing and Heating Invoice#39398	1	1500.00	10.00	/ %	1650.00
-- Select Rate --		0	0.00	0.00	/ %	2512.50

   vi. **Click on Update**

Tickets					
Year: 2020	Ticket: 13-Jan-2020 - 19-01-1301-01 :: Test Project3	Padded Hours Unbilled Hours	Legacy Ticket: ☐	Add Update Delete Print
		Time Management	Hours	Ticket #: 19-01-1301-01

Reports

Equipment hours

Selecting edit mode allows you to decide what items will show up in the report as well as a way to mass deactivate equipment.

1. Select edit mode check box.
2. Select what mode you want: "Remove From Efficiency Report" or "Deactivate".
3. Select the equipment you want to edit.
4. Click the submit button.

To undo these edits. You must go find the equipment you want to change in the equipment tab. See the Equipment section of this document.

File Groups

File Groups is an admin only page. It is used to add different permissions to folders in the file system so certain users will only see files that pertain to them. See the files section on how to add permissions to a folder.

Files

Creating a folder:

1. First navigate to where you wish to create the folder by using the folder tree on the left.
2. Click the "Create a Folder" link in the top left-hand corner.
3. A popup will ask for the folder name, enter the name.
4. Click "Create" button.

Uploading a file:

1. Click "upload a file" button in top left-hand corner. Up come a window.
2. Select the files you want to upload. More than one can be selected.
3. Add an optional description.
4. If you wish to notify another user of the file being uploaded. Select as many users you wish to notify from the dropdown list.
5. Add an optional comment that will appear in the notification.
6. Click upload.

Creating pre-defined folder structures:

1. Select a subfolder in which you wish to generate the folder structure (note this cannot be in the root directory).
2. Click one of the generate folders button in the upper right-hand side of the screen.
3. This will ask to confirm whether or not to create the folders.

Deleting files and folders:

1. Navigate to the file/folder you wish to delete.
2. Select the file/folder by checking the box to the left of it.
3. Click the "Remove Selected Items" button at the bottom of the list of files.

Users/Profile

Users tab controls the logins for all the users.

Before adding a new login for a new employee create a new employee under the employee tab. Filling out all information there first.

To create a new user for a new employee.

1. Click "Add new user"
2. Click the generate users button. This will automatically set all info. (First Name, Last Name, Username, and assigns the employee)

The username is what is used to login to the application.

The "assign employee to user" is the link between the employees and their logins.
It is crucial for this to be set for users who need to fill out timesheets.

First name and last name fields will be used for the welcome message on the right side of the header. Only administrators are able to change the Employee that the login information is assigned to as well as the Access level the user.

Here you can set the username and password for the employee.

Access Level change what users can see what.

Clients:

1. View files that pertain to them.
2. View and edit their own name and last name, and password.

Time Users:

1. Everything above.
2. View the calendar.
   a. Submit leave requests.
   b. Manage their notifications.
   c. Click to view items in the calendar.
   d. Unable to view tickets or projects.
3. View the job board.
   a. Cannot edit the jobs.
4. Submit and manage their own timesheets.

Users:

1. Everything above.
2. View other tickets by selecting them in the calendar but are unable to edit them.
3. Make and edit their own tickets.
4. View the Daily hour report.

Managers:

1. Everything above.
2. Can change and edit the jobs tab.
3. Can view and edit customers and customers projects.

Jobs

1. Click add job at the top to add a job to the list.
2. Select a job.
3. Add some comments.
4. Click save.

To edit a job (change the project or edit comments)

1. Click the job you wish to edit.
2. Make the needed changes.
3. Click save.

Adding equipment or an employee to a job.

1. Drag an employee from the left-hand column into a job under the employees header.
2. Drag a piece of equipment from the right-hand column into a job under the equipment header.

Out of service equipment.

1. Drag a piece of equipment from a job or from the equipment list to the out of service column just to the right of the equipment column.
2. Note an out of piece of equipment turns red. To restore the equipment back to its original colour drag it from the out of service column back to the main equipment column.

Adding a supervisor to a job.

1. Drag an employee from the left column into a job under the supervisor header.
2. To change the supervisor either remove the previous one then drag the new supervisor back in or simply dragging a new supervisor onto an existing one will replace it and move the previous supervisor to the employee list on that job.
3. Note employees who are on vacation are blue and cannot be assigned to a job. If they were previously on a job you are able to remove them by dragging them back to the employees column on the left side.