



Ticketing Application Manual

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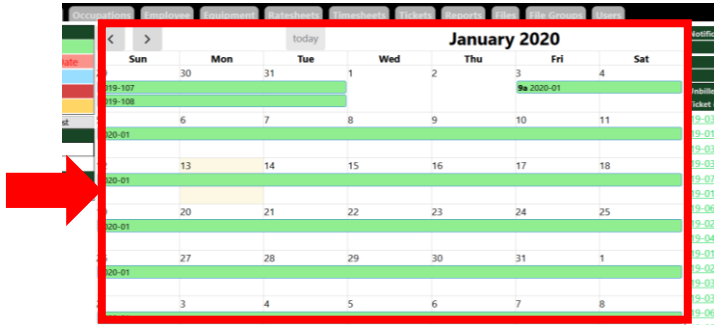
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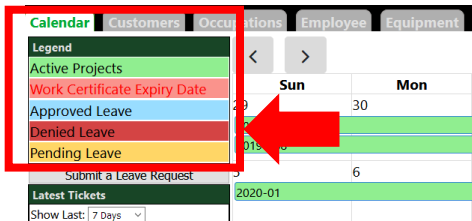
***Please note if you do not see certain areas discussed in this manual, they may only be visible with Administration access. ***

Calendar

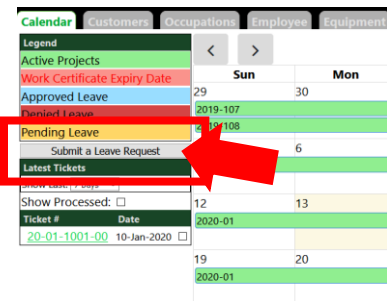
The Calendar can be viewed in the Center of the screen.



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

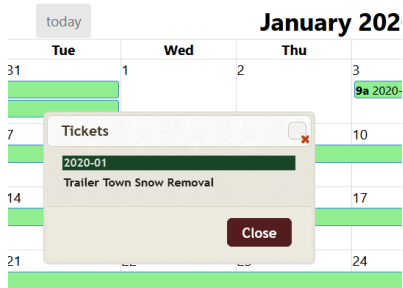


Below the legend is a submit leave request button



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.

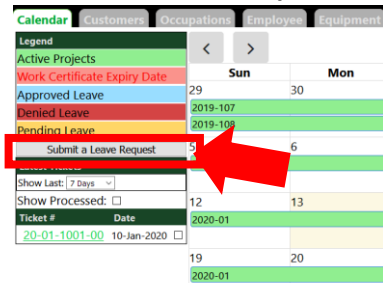


Clicking on a vacation will allow you to view the information.

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

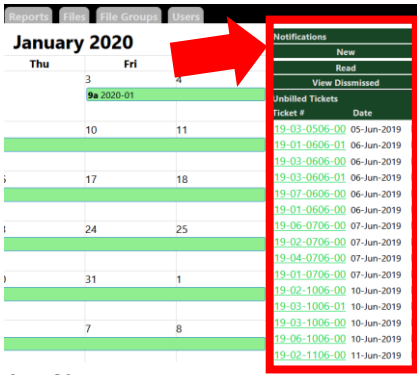
- a. Ensure the Time is entered as required

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

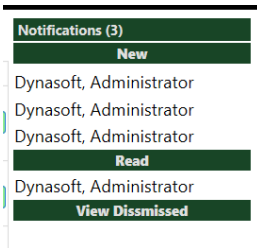
- a. In this section you will find new unchecked notifications for leave request updates and file uploads.

2- Read

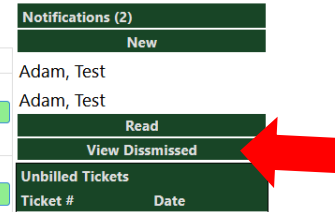
- a. This area is where you will find notifications that you've already seen but haven't dismissed yet.

3- View Dismissed

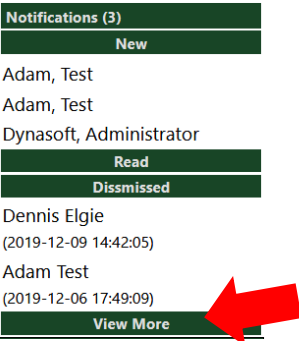
- a. This area is where your dismissed notifications end up.



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 Dismissed	
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.

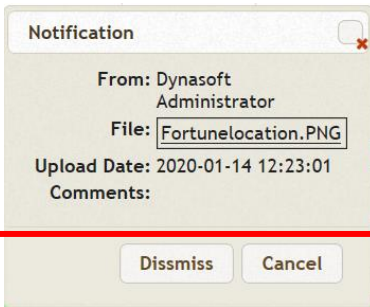
****The Vacation Date can be edited only if the date is in the future****

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 Dismissed	
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.

Unbilled Tickets		
Ticket #	Date	
19-03-0506-00	05-Jun-2019	<input type="checkbox"/>

Latest Tickets		
Show Last:	7 Days	
Show Processed:	<input type="checkbox"/>	
Ticket #	Date	
19-05-0705-00	07-May-2020	<input type="checkbox"/>

Customers

Adding a new customer

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

Customers

Customer:

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

Customers

Customer:

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

Customers

Customer:

Editing Customers

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

Customers

Customer:

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.

Customers

Customer:

Applying Default Ratesheet to Customer

- 1- Click on the Customers Tab

Calendar **Customers** Occupations Employee Equipment Ratesheets

Customers

- 2- Select Customer from Drop Down Menu

Calendar **Customers** Occupations Employee Equipment Timesheets Tickets Reports Files File Groups Users

Customers

Customer:

Name:

Address:

City: Province:

Postal Code: Default Ratesheet:

Primary Contact:

Email:

- 3- Click on the drop down Menu for Default Ratesheet

Calendar **Customers** Occupations Employee Equipment Ratesheets Timesheets Tickets Reports Files File Groups Users

Customers

Customer:

Name:

Address:

City: Province:

Postal Code: Default Ratesheet:

Primary Contact:

Email:

- 4- Select the rate sheet from drop down menu

Calendar Customers Occupations Employee Equipment Ratesheets Timesheets Tickets R

Customers

Customer: A-Plus Machining Add Save Delete

Name: A-Plus Machining

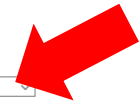
Address: 4702 62nd Ave

City: Loydminster Province: AB

Postal Code: T9V 2G2 Default Ratesheet: Facility Contractor

Primary Contact: Test Contact

Email: test.contact@example.com



5- Click on save

Calendar Customers Occupations Employee Equipment Ratesheets Timesheets Tickets R

Customers

Customer: A-Plus Machining Add Save Delete

Name: A-Plus Machining



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: 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



Occupations

Occupation: Administration Add Save Cancel Show Inactive Occupations

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



Occupations

Occupation: Administration Add Save Cancel Show Inactive Occupations

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



Employees

Employee: Adam, Test Add Update Show Inactive

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

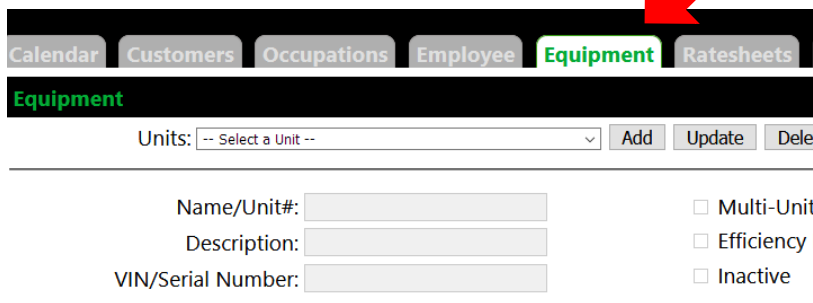
1. **Select the employee you wish to add certificates for.**
2. **Start typing in the name of the certificate and a line will be added to add the rest of the information.**
3. **Set the grade of the certificate. (Optional)**
4. **Set the issue date**
5. **Set the Expiry date. Tickets will appear in the 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.

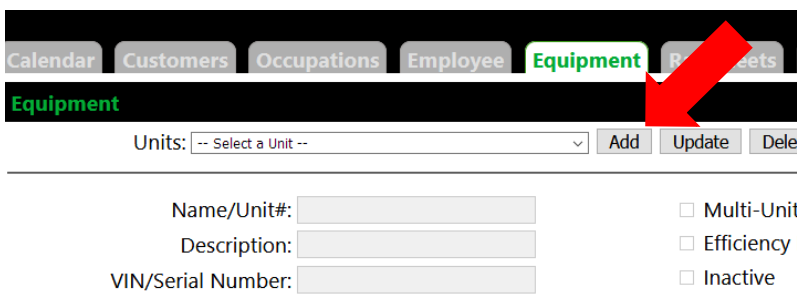
Adding Equipment

1- Select the Equipment Tab



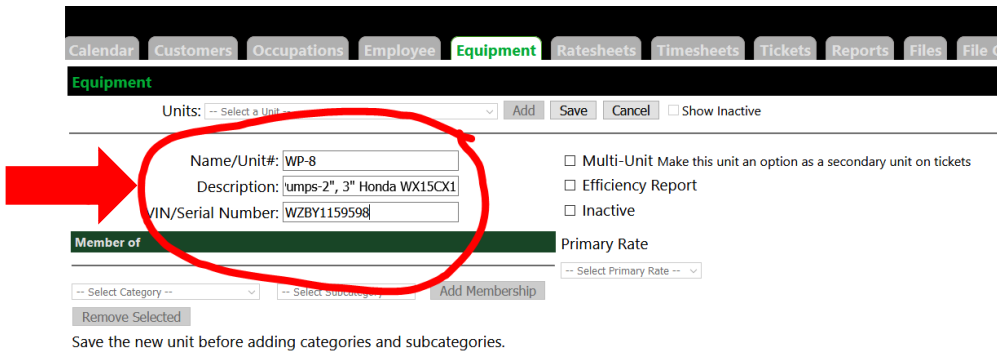
The screenshot shows a navigation bar with tabs: Calendar, Customers, Occupations, Employee, **Equipment**, and Ratesheets. A red arrow points to the 'Equipment' tab. Below the navigation bar, the 'Equipment' section is active, showing a dropdown menu for 'Units' with the text '-- Select a Unit --', and buttons for 'Add', 'Update', and 'Delete'. Below this are three input fields: 'Name/Unit#:', 'Description:', and 'VIN/Serial Number:'. To the right of these fields are three checkboxes: 'Multi-Unit', 'Efficiency', and 'Inactive'.

2- Click on Add



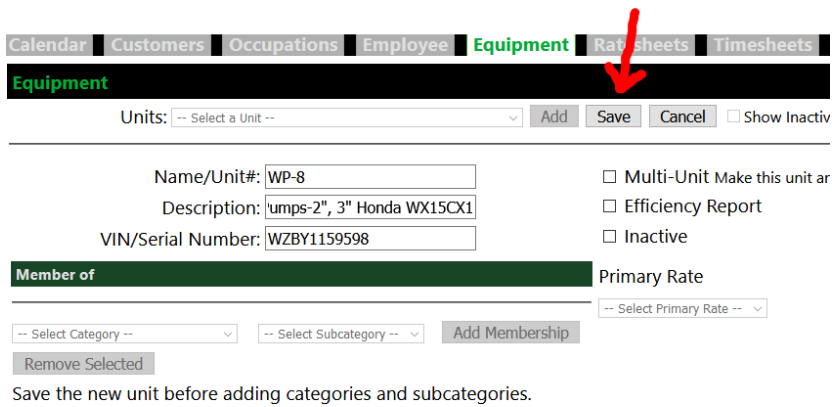
The screenshot shows the same 'Equipment' tab interface as above. A red arrow points to the 'Add' button in the 'Units' dropdown menu.

3- Enter in the details of the equipment



The screenshot shows the 'Equipment' form with the following details entered: 'Name/Unit#:' is 'WP-8', 'Description:' is 'umps-2", 3" Honda WX15CX1', and 'VIN/Serial Number:' is 'WZBY1159598'. A red circle highlights these three input fields, and a red arrow points to the circle. To the right of the input fields are three checkboxes: 'Multi-Unit Make this unit an option as a secondary unit on tickets', 'Efficiency Report', and 'Inactive'. Below the input fields is a 'Member of' section with a 'Primary Rate' dropdown menu. At the bottom, there are dropdown menus for 'Select Category' and 'Select Subcategory', and buttons for 'Add Membership' and 'Remove Selected'. Below the form, the text reads: 'Save the new unit before adding categories and subcategories.'

4- Click Save



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets

Equipment

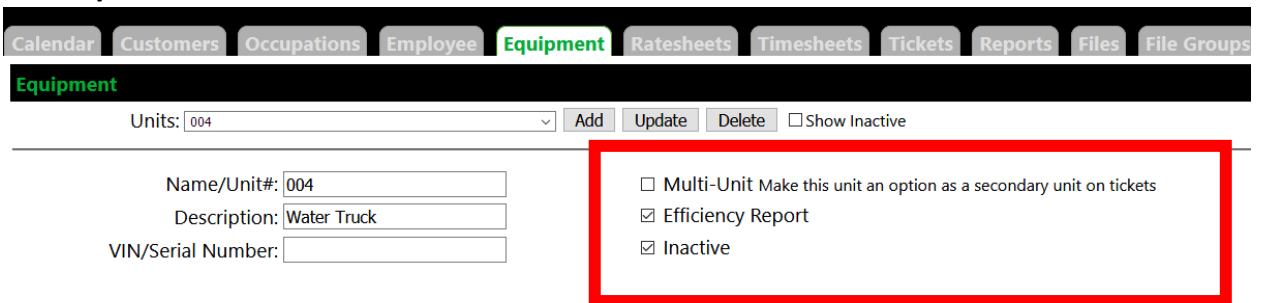
Units: -- Select a Unit -- Add Save Cancel Show Inactive

Name/Unit#: WP-8 Multi-Unit Make this unit ar
Description:umps-2", 3" Honda WX15CX1 Efficiency Report
VIN/Serial Number: WZBY1159598 Inactive

Member of Primary Rate
-- Select Category -- -- Select Subcategory -- Add Membership
Remove Selected

Save the new unit before adding categories and subcategories.

Equipment Options



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports Files File Groups

Equipment

Units: 004 Add Update Delete Show Inactive

Name/Unit#: 004 Multi-Unit Make this unit an option as a secondary unit on tickets
Description: Water Truck Efficiency Report
VIN/Serial Number: Inactive

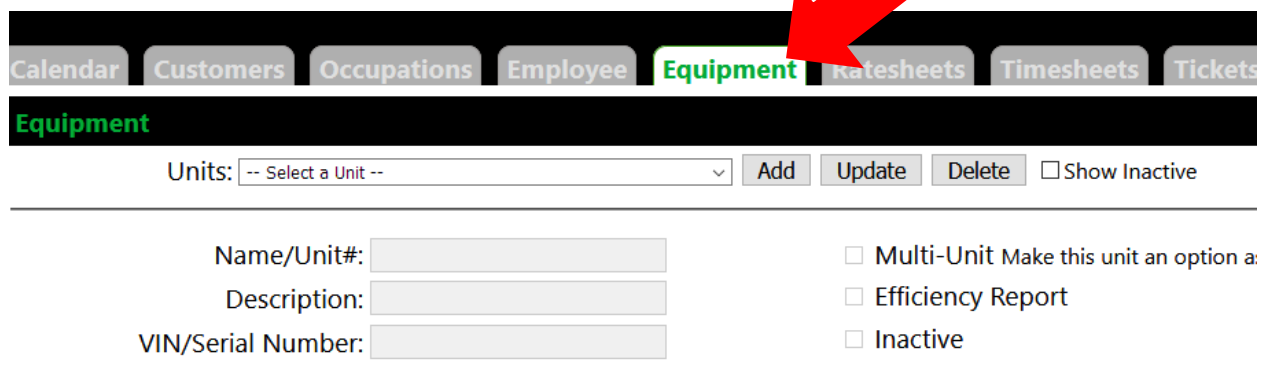
1- Equipment Options;

- 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



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete Show Inactive

Name/Unit#: Multi-Unit Make this unit an option a
Description: Efficiency Report
VIN/Serial Number: Inactive

2- Select Equipment from Drop Down Menu

Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete Show Inactive

Name/Unit#:

Description:

VIN/Serial Number:

Multi-Unit Make this unit an option a
 Efficiency Report
 Inactive

3- Click on Inactive

Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports P

Equipment

Units: 004 Add Update Delete Show Inactive

Name/Unit#: 004 Multi-Unit Make this unit an option as a secondary unit

Description: Water Truck Efficiency Report

VIN/Serial Number: Inactive

4- Click on Update

Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports P

Equipment

Units: 004 Add Update Delete Show Inactive

Name/Unit#: 004 Multi-Unit Make this unit an option as a secondary unit

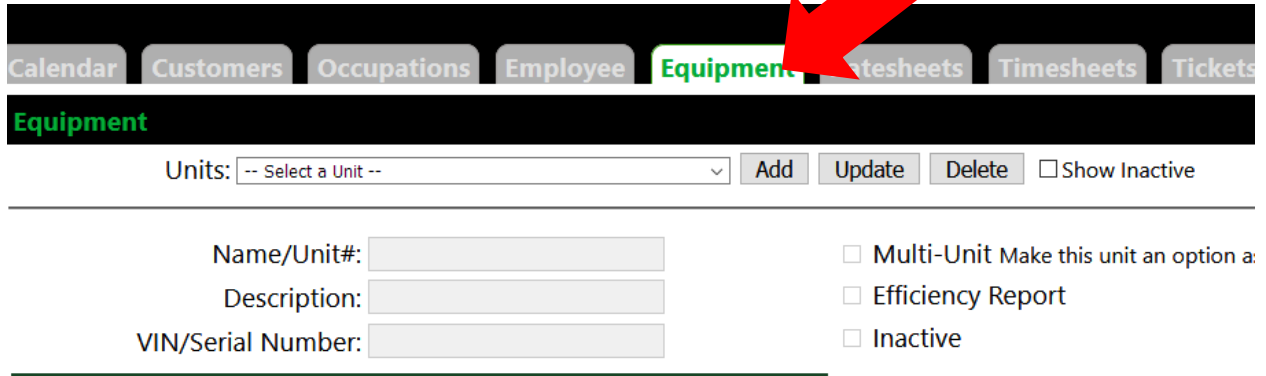
Description: Water Truck Efficiency Report

VIN/Serial Number: Inactive

The item is now inactive

To Mark Equipment as Active

1- Click on Equipment Tab



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

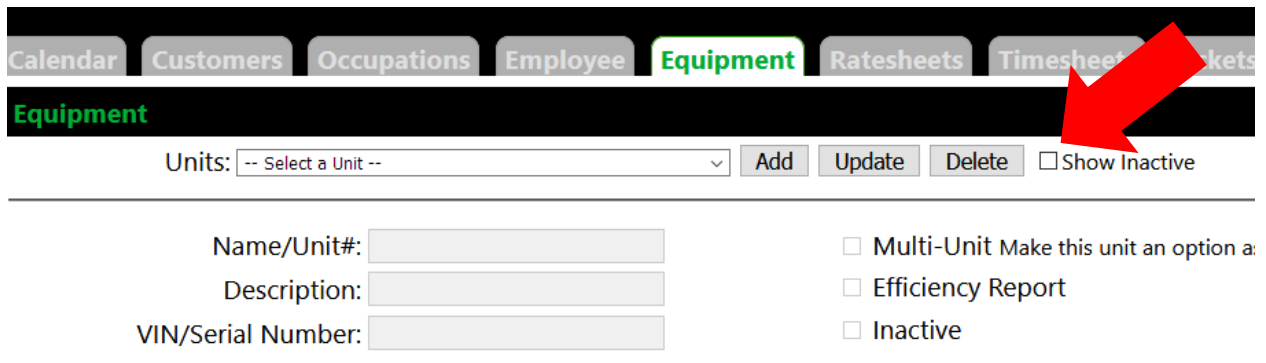
Units: -- Select a Unit -- Add Update Delete Show Inactive

Name/Unit#: Multi-Unit Make this unit an option a

Description: Efficiency Report

VIN/Serial Number: Inactive

2- Click on Show Inactive



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

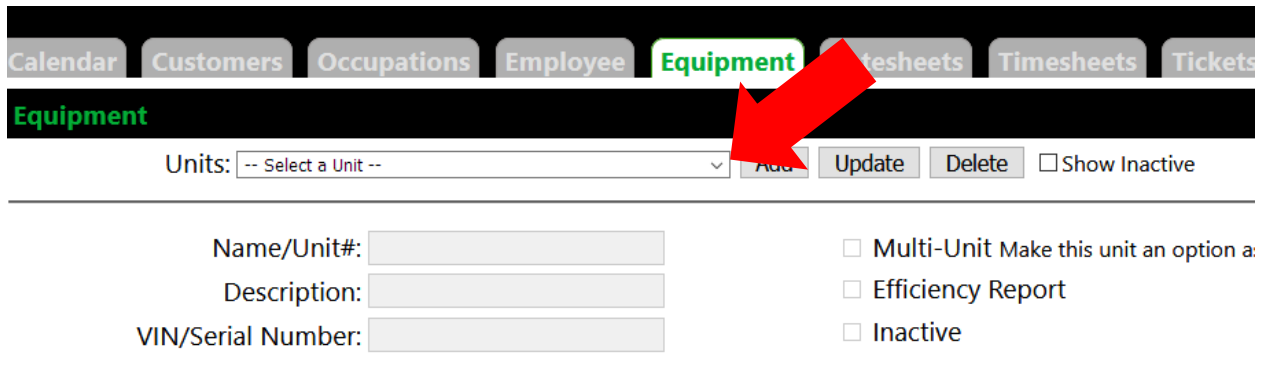
Units: -- Select a Unit -- Add Update Delete Show Inactive

Name/Unit#: Multi-Unit Make this unit an option a

Description: Efficiency Report

VIN/Serial Number: Inactive

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



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets

Equipment

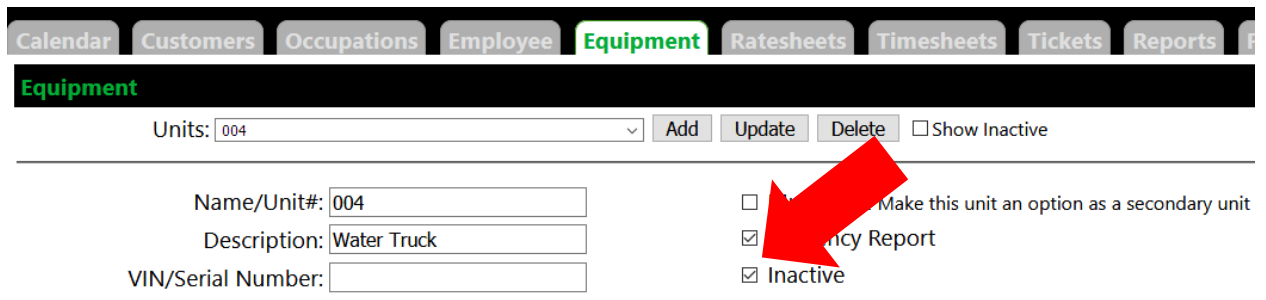
Units: -- Select a Unit -- Add Update Delete Show Inactive

Name/Unit#: Multi-Unit Make this unit an option a

Description: Efficiency Report

VIN/Serial Number: Inactive

4- Click on Inactive



Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports P

Equipment

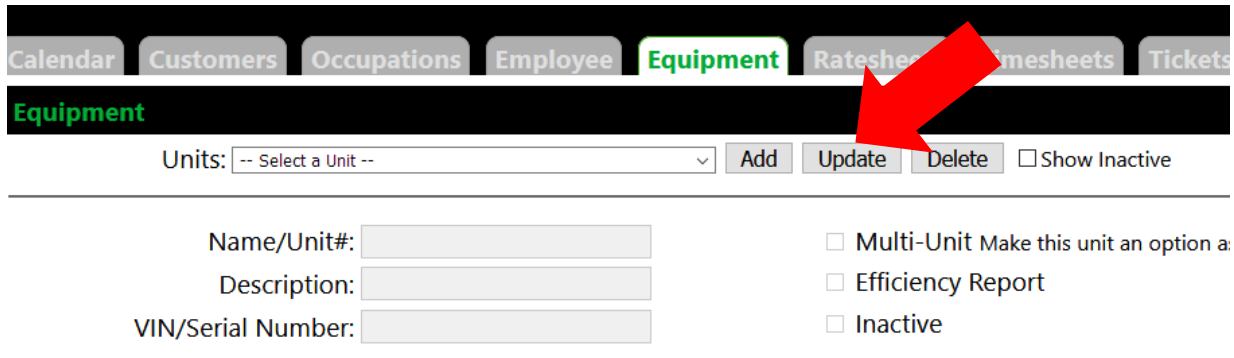
Units: 004 Add Update Delete Show Inactive

Name/Unit#: 004 Multi-Unit Make this unit an option as a secondary unit

Description: Water Truck Efficiency Report

VIN/Serial Number: Inactive

5- Click on Update



Calendar Customers Occupations Employee **Equipment** Ratesheet Timesheets Tickets

Equipment

Units: -- Select a Unit -- Add Update Delete Show Inactive

Name/Unit#:

Description:

VIN/Serial Number:

Multi-Unit Make this unit an option a

Efficiency Report

Inactive

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

Equipment

Units: WP-10 Show Inactive

Name/Unit#: WP-10 Multi-Unit Make this unit an opti
 Description: FLE Water Pumps-2 Efficiency Report
 VIN/Serial Number: 20167542 Inactive

Member of Primary Rate

Power/Hydraulic Equipment (FLE) Water Pumps- 2", 3"

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

Equipment

Units: WP-10 Show I

Name/Unit#: WP-10 Multi-Unit Make this un
 Description: FLE Water Pumps-2 Efficiency Report
 VIN/Serial Number: 20167542 Inactive

Member of Primary Rate

Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

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

Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets Reports Files File G

Equipment

Units: WP-10 Show Inactive

Name/Unit#: WP-10 Multi-Unit Make this unit an option as a secondary unit on tickets
 Description: FLE Water Pumps-2 Efficiency Report
 VIN/Serial Number: 20167542 Inactive

Member of Primary Rate

Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

7- Click on Select Category

Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets Tickets R

Equipment

Units: WP-8 Show Inactive

Name/Unit#: WP-8 Multi-Unit Make this unit an option as a sec
 Description: FLE Water Pumps-2 Efficiency Report
 VIN/Serial Number: WZBY1159598 Inactive

Member of Primary Rate

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

Calendar Customers Occupations Employee **Equipment** Ratesheets Timesheets

Equipment

Units: WP-8 Add Update Delete Show Inactive

Name/Unit#: WP-8 Multi-Unit Make this unit an o
 Description: FLE Water Pumps-2 Efficiency Report
 VIN/Serial Number: WZBY1159598 Inactive

Member of Primary Rate

Power/Hydraulic Equipment (FLE) -- Select Subcategory -- Add Membership -- Select Primary Rate --

- Select Category --
- Compactors
- Dozers
- Equipment Attachments
- Excavators
- Graders
- Manpower
- Misclassified
- Other
- Power/Hydraulic Equipment (FLE)**
- Power/Hydraulics Equipment (FHE)
- Skid Steer
- Trailers
- Trucks & Hauling
- Vehicles
- Wheel Loader

9- Select Subcategory from drop down list

Calendar Customers O Equipment Ratesheets Timesheets

Equipment

Units: WP-09 Add Update Delete Show Inactive

Name/Unit#:
 Description:
 VIN/Serial Number:

Member of Primary Rate

Power/Hydraulic Equipment (FLE) -- Select Subcategory -- Add Membership -- Select Primary Rate --

- Concrete/Asphalt Saws
- Gas Pressure Washers
- Grout Plant
- Hilti Drills
- Intrinsically Safe Light Stand 1000 w
- Laser Level
- Pneumatic Scrapers/Jackhammers
- Power Scream
- Power Trowels
- Skid Steer Grapple Forks
- Small Equipment (saws, drills, grinders etc.)
- Water Pumps- 2", 3"
- Weed Wacker

10- After selecting, it will appear as follows;

Equipment

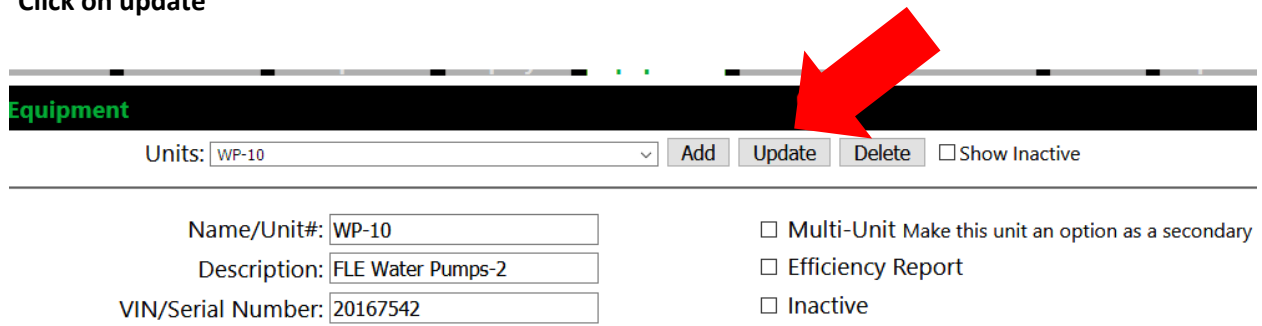
Units: WP-10 Add Update Delete Show Inactive

Name/Unit#: WP-10 Multi-Unit Make this unit an option as a secondary unit on tickets
 Description: FLE Water Pumps-2 Efficiency Report
 VIN/Serial Number: 20167542 Inactive

Member of Primary Rate

Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3" Power/Hydraulic Equipment (FLE) - Water Pumps- 2", 3"

11- Click on update



Equipment

Units: WP-10 Add Update Delete Show Inactive

Name/Unit#: WP-10 Multi-Unit Make this unit an option as a secondary

Description: FLE Water Pumps-2 Efficiency Report

VIN/Serial Number: 20167542 Inactive

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

Memberships

Category:

Category Name:

Inactive

- 4- Type in the name of the Category

Memberships

Category:

Category Name:

Inactive

- 5- Click on Save

Memberships

Category:

Category Name:

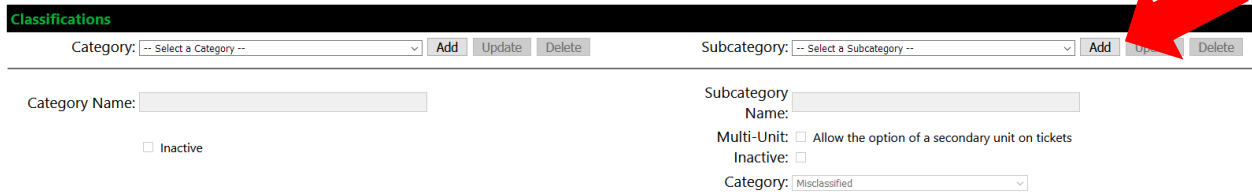
Inactive

You have successfully added a new Category

Adding a Subcategory

This section will add the subcategory for your parts

1- Click on Add



Classifications

Category: -- Select a Category -- Add Update Delete Subcategory: -- Select a Subcategory -- Add Update Delete

Category Name:

Inactive

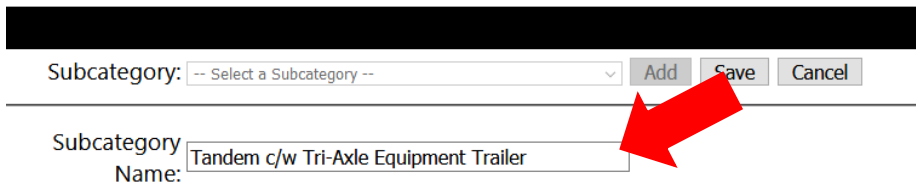
Subcategory Name:

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

Inactive:

Category: Misclassified

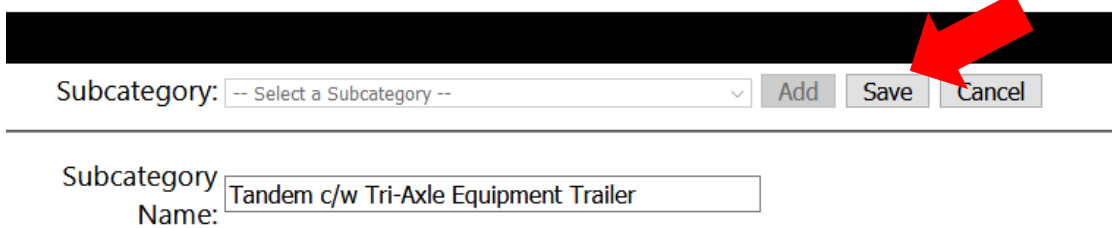
2- Type in the Subcategory name



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

Subcategory Name:

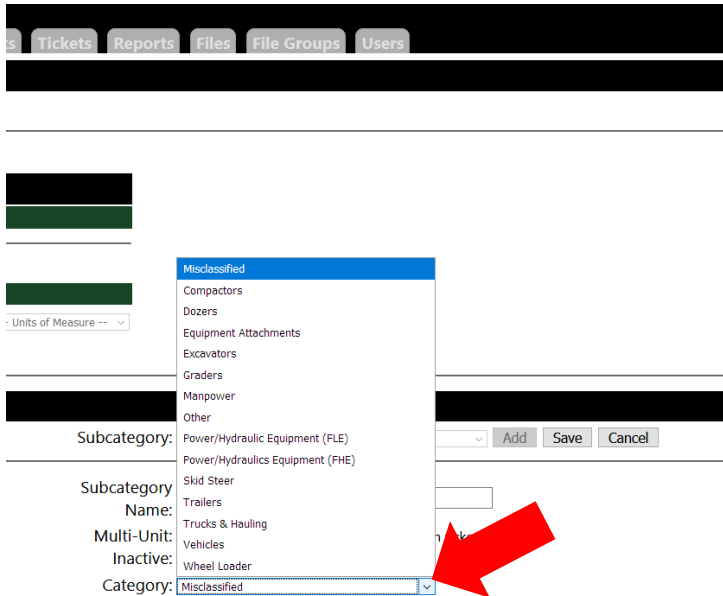
3- Click on Save



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

Subcategory Name:

4- Select the Category from the dropdown list



Tickets Reports Files File Groups Users

Subcategory:

Subcategory Name:

Multi-Unit:

Inactive:

Category:

- Misclassified
- Compactors
- Dozers
- Equipment Attachments
- Excavators
- Graders
- Manpower
- Other
- Power/Hydraulic Equipment (FLE)
- Power/Hydraulics Equipment (FHE)
- Skid Steer
- Trailers
- Trucks & Hauling
- Vehicles
- Wheel Loader

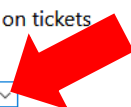
For this example, we selected Trucks & Hauling click on the category item you wish to select
After selecting this category, it will appear as per example below;

Subcategory:

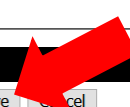
Subcategory Name:

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

Inactive:

Category: 

5- Click on Save button

Subcategory: 

Subcategory Name:

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

Inactive:

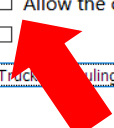
Category:

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:


Subcategory Name:

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

Inactive: 

Category:

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

Subcategory: 

Subcategory Name:

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

Inactive:

Category:

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;

Ratesheets

Ratesheet: [- Select a Ratesheet --] Add Update Delete

Ratesheet Name: []

Rates

Name	Rate
------	------

Remove Selected

Add Rate

[- Select Rate --] [] [- Units of Measure --]

Add Rate

Other Rates

Overtime Rate Type

Flat Overtime Rate Flat Statutory Holiday Rate

Scaled Overtime Rate Scaled Statutory Holiday Rate

Other Rates

Overtime Rate none ▾

Statutory Holidays none ▾

After Hour Call Outs none ▾

Night Shift Premium none ▾

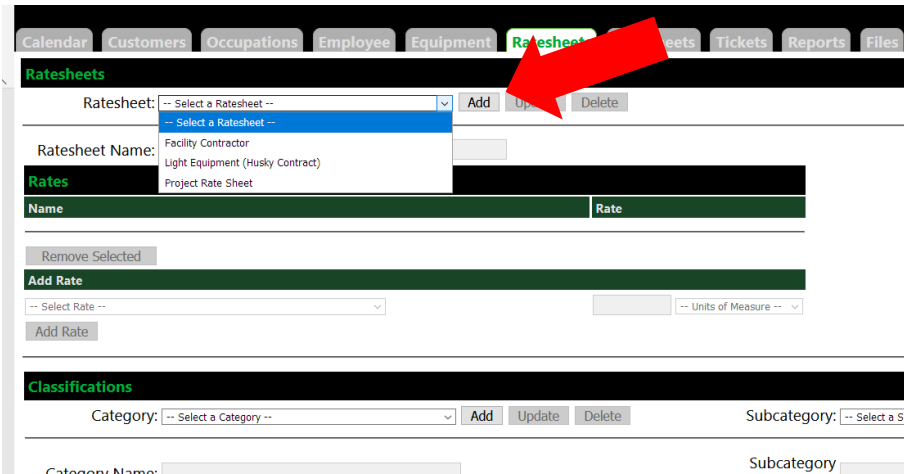
Materials & Rental Equipment none ▾

Subcontractor Labor none ▾

2- You now see a list of Rates on the left and Other rates on the right.

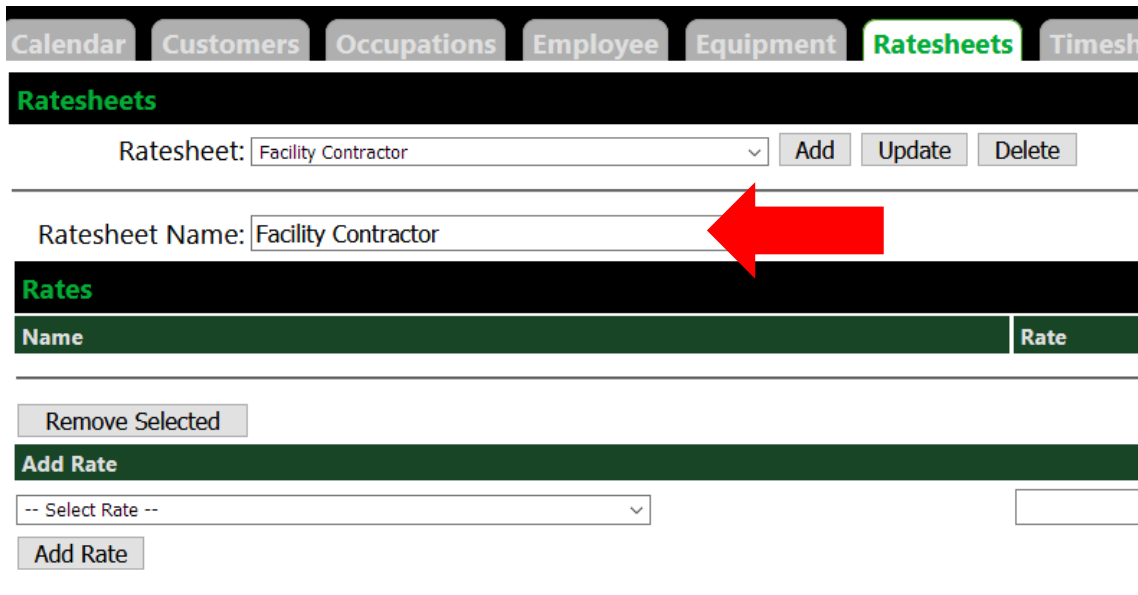
Add a new Ratesheet follow the following steps;

1. Click on add



The screenshot shows the 'Ratesheets' page in a software application. The navigation bar at the top includes 'Calendar', 'Customers', 'Occupations', 'Employee', 'Equipment', 'Ratesheets', 'Tickets', 'Reports', and 'Files'. The 'Ratesheets' section is active, showing a dropdown menu for 'Ratesheet:' with options like 'Facility Contractor', 'Light Equipment (Husky Contract)', and 'Project Rate Sheet'. A red arrow points to the 'Add' button. Below this, there are sections for 'Rates' and 'Classifications'.

2. Type in the name of the Ratesheet



The screenshot shows the 'Ratesheets' page with the 'Facility Contractor' name entered in the 'Ratesheet Name' field. A red arrow points to the text input field. The 'Ratesheet:' dropdown is also set to 'Facility Contractor'. The 'Add', 'Update', and 'Delete' buttons are visible. Below the name field, there is a 'Rates' section with a table header 'Name' and 'Rate', and an 'Add Rate' section with a dropdown menu and an 'Add Rate' button.

3- Click on Save

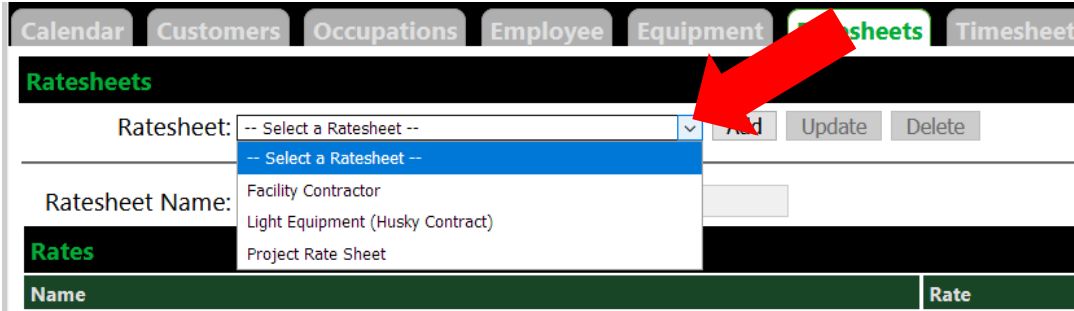


The screenshot shows the 'Ratesheets' page with the 'Facility Contractor' name entered in the 'Ratesheet Name' field. A red arrow points to the 'Save' button. The 'Ratesheet:' dropdown is still set to 'Facility Contractor'. The 'Add', 'Update', and 'Delete' buttons are visible. Below the name field, there is a 'Rates' section with a table header 'Name' and 'Rate', and an 'Add Rate' section with a dropdown menu and an 'Add Rate' button.

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

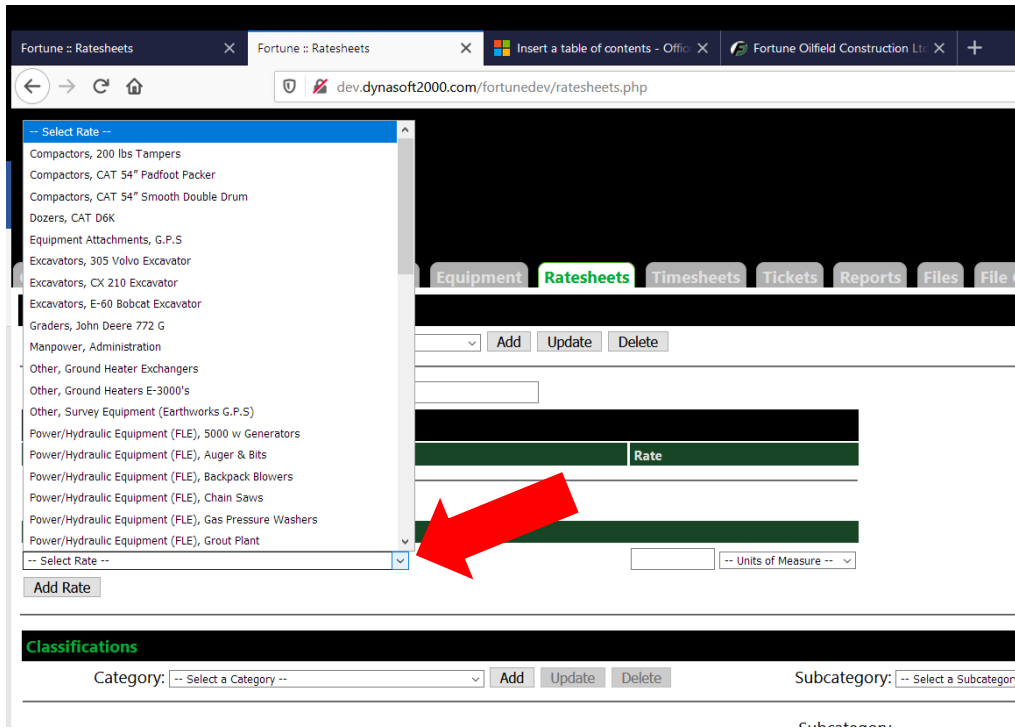
Adding Rates

1- Select Rate Sheet from Drop Down List



The screenshot shows the 'Ratesheets' section of a software interface. At the top, there are navigation tabs: Calendar, Customers, Occupations, Employee, Equipment, Ratesheets (highlighted in green), and Timesheets. Below the tabs, there is a 'Ratesheets' header. Underneath, there is a 'Ratesheet:' dropdown menu with the text '-- Select a Ratesheet --'. A red arrow points to this dropdown menu. Below the dropdown, there is a 'Ratesheet Name:' field with a text input containing 'Facility Contractor'. Below that, there is a 'Rates' section with a table header: 'Name' and 'Rate'. The table is currently empty.

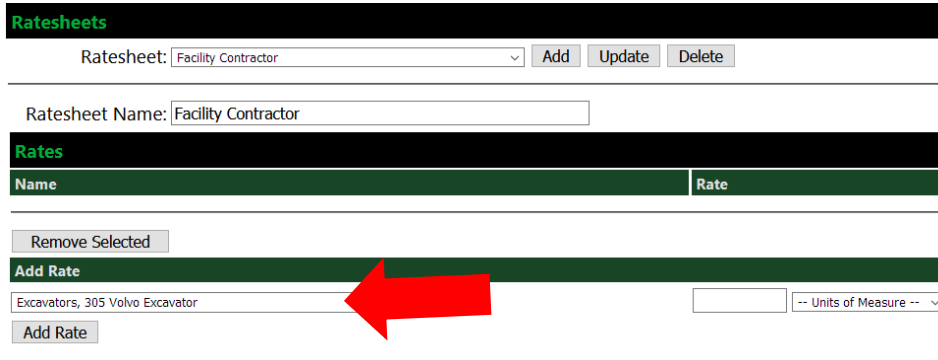
2- Select Rate from drop down menu



The screenshot shows the 'Ratesheets' section of a software interface. At the top, there are navigation tabs: Equipment, Ratesheets (highlighted in green), Timesheets, Tickets, Reports, Files, and File G. Below the tabs, there is a 'Rates' section with a table header: 'Name' and 'Rate'. The table is currently empty. Below the table, there is a 'Rates' section with a dropdown menu for selecting a rate. A red arrow points to this dropdown menu. Below the dropdown, there is an 'Add Rate' button. Below that, there is a 'Classifications' section with a 'Category:' dropdown menu and a 'Subcategory:' dropdown menu. The 'Category:' dropdown menu has the text '-- Select a Category --'. The 'Subcategory:' dropdown menu has the text '-- Select a Subcategory --'. Below the 'Classifications' section, there is a 'Subcategory:' label.

3- Select the item you would like to add

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



The screenshot shows the 'Ratesheets' section of a software interface. At the top, there is a 'Ratesheet:' dropdown menu with the text 'Facility Contractor'. Below the dropdown, there is a 'Ratesheet Name:' field with a text input containing 'Facility Contractor'. Below that, there is a 'Rates' section with a table header: 'Name' and 'Rate'. The table is currently empty. Below the table, there is a 'Remove Selected' button. Below that, there is an 'Add Rate' section with a dropdown menu for selecting a rate. A red arrow points to this dropdown menu. Below the dropdown, there is an 'Add Rate' button. Below that, there is a 'Classifications' section with a 'Category:' dropdown menu and a 'Subcategory:' dropdown menu. The 'Category:' dropdown menu has the text '-- Select a Category --'. The 'Subcategory:' dropdown menu has the text '-- Select a Subcategory --'. Below the 'Classifications' section, there is a 'Subcategory:' label.

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

Ratesheets

Ratesheet: Facility Contractor Add Update Delete

Ratesheet Name: Facility Contractor

Rates


Name	Rate
------	------

Remove Selected

Add Rate

Excavators, 305 Volvo Excavator 15 -- Units of Measure --

Add Rate



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

Rates

Name	Rate
------	------

Remove Selected

Add Rate

-- Select Rate -- -- Units of Measure --

Add Rate



6- Click on Add Rate

Ratesheets

Ratesheet: Facility Contractor Add Update Delete

Ratesheet Name: Facility Contractor

Rates


Name	Rate
------	------

Remove Selected

Add Rate

Excavators, 305 Volvo Excavator 15 month

Add Rate



The items you have added will now appear under rates;

Ratesheets

Ratesheet: Facility Contractor Add Update Delete

Ratesheet Name: Facility Contractor

Rates

<input type="checkbox"/> Vehicles, ATVs	\$16 /hour
<input type="checkbox"/> Vehicles, Crew Truck	\$29.5 /hour
<input type="checkbox"/> Vehicles, Water Trucks	\$209 /day



7- Click on Update to save the entries

Ratesheets

Ratesheet: Facility Contractor

Ratesheet Name: Facility Contractor

Rates

Name	Rate
<input type="checkbox"/> Vehicles, ATVs	\$16 /hour
<input type="checkbox"/> Vehicles, Crew Truck	\$29.5 /hour
<input type="checkbox"/> 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

<input type="checkbox"/>	Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$20 /day
<input type="checkbox"/>	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;

<input checked="" type="checkbox"/>	Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$20 /day
<input type="checkbox"/>	Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$45 /hour

- 5- Click on Remove Selected;

<input checked="" type="checkbox"/>	Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$20 /day
<input type="checkbox"/>	Power/Hydraulics Equipment (FHE), Loader Pallet Forks w/ Grapple	\$45 /hour

Remove Selected

- 6- Click on Update

Ratesheets

Ratesheet: Facility Contractor

Ratesheet Name: Facility Contractor

Rates

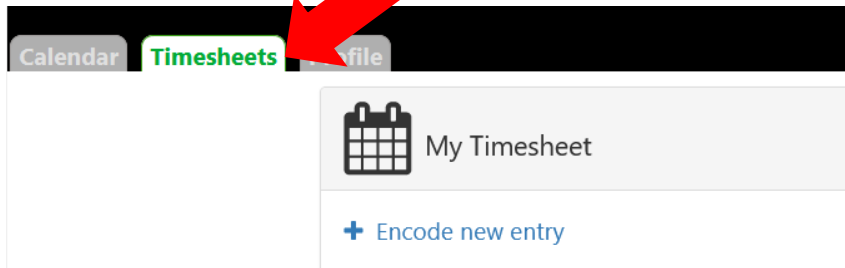
Name	Rate
<input type="checkbox"/> Vehicles, ATVs	\$16 /hour
<input type="checkbox"/> Vehicles, Crew Truck	\$29.5 /hour
<input type="checkbox"/> Vehicles, Water Trucks	\$209 /day

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

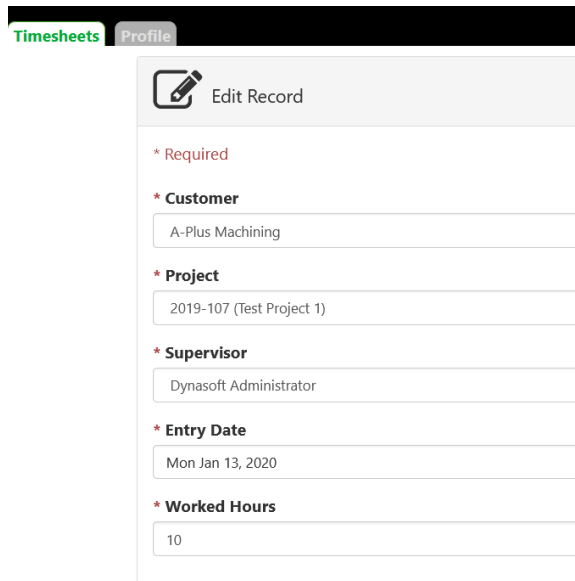
Timesheets

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.



Timesheets Profile

Edit Record

* Required

* Customer
A-Plus Machining

* Project
2019-107 (Test Project 1)

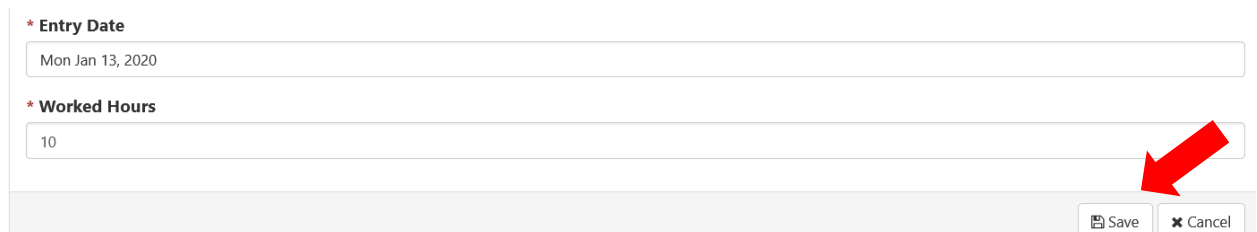
* Supervisor
Dynasoft Administrator

* Entry Date
Mon Jan 13, 2020

* Worked Hours
10

- 4- Click on Save

Note: filing a timesheet for a past date will submit a change request



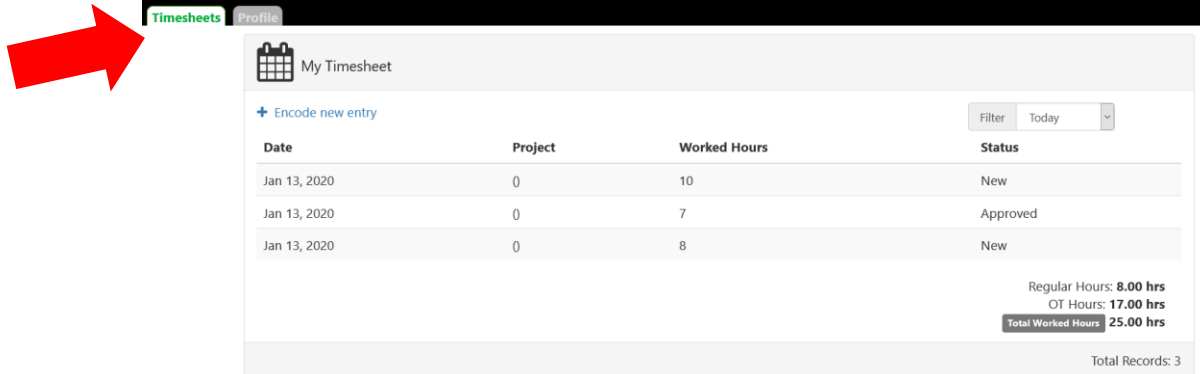
* Entry Date
Mon Jan 13, 2020

* Worked Hours
10

Save Cancel

Edit Timesheets as Employee

1- Click on Timesheets Tab



The screenshot shows the 'My Timesheet' interface. At the top, there are two tabs: 'Timesheets' (highlighted in green) and 'Profile'. A red arrow points to the 'Timesheets' tab. Below the tabs, there is a 'My Timesheet' header with a calendar icon. Underneath, there is a '+ Encode new entry' button and a 'Filter' dropdown menu set to 'Today'. A table displays the following data:

Date	Project	Worked Hours	Status
Jan 13, 2020	0	10	New
Jan 13, 2020	0	7	Approved
Jan 13, 2020	0	8	New

Summary statistics at the bottom right:

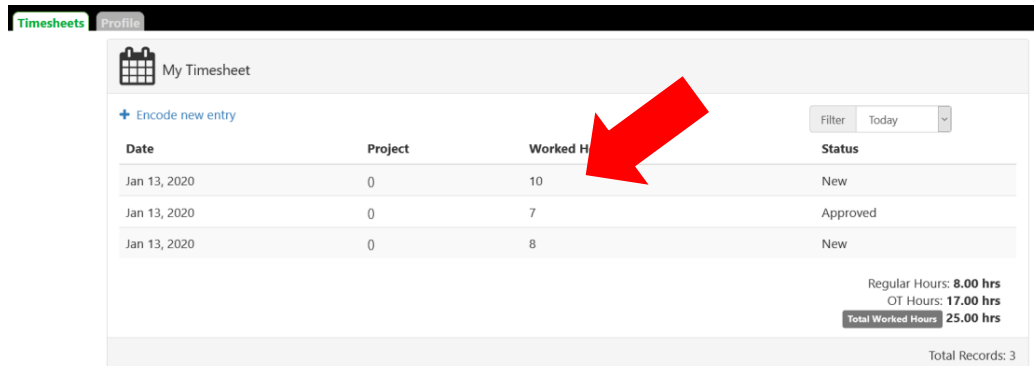
- Regular Hours: 8.00 hrs
- OT Hours: 17.00 hrs
- Total Worked Hours: 25.00 hrs

Total Records: 3

2- Click on the Timesheet you would like to edit

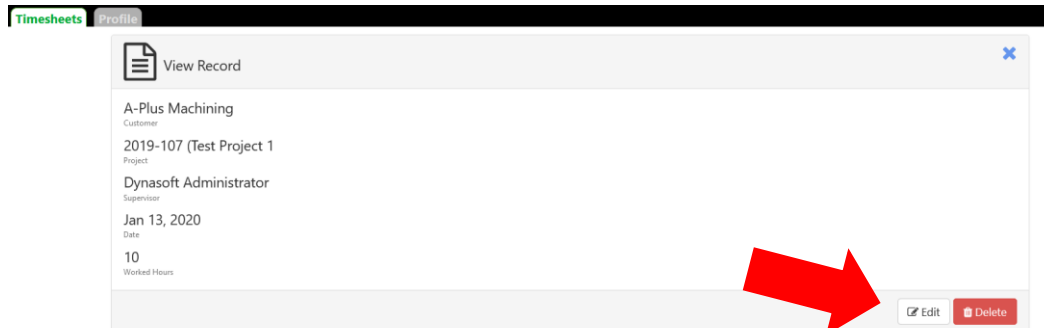
In this example we want to edit the hours worked for the top entry

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



This screenshot is identical to the previous one, but a red arrow points to the first row of the table (Jan 13, 2020, 0, 10, New).

3- Click on edit




The screenshot shows a 'View Record' dialog box. It contains the following information:

- Customer: A-Plus Machining
- Project: 2019-107 (Test Project 1)
- Supervisor: Dynasoft Administrator
- Date: Jan 13, 2020
- Worked Hours: 10

At the bottom right, there are two buttons: 'Edit' and 'Delete'. A red arrow points to the 'Edit' button.

4- Edit the information needed

 Edit Record

* Required



* Customer
A-Plus Machining

* Project
2019-107 (Test Project 1)

* Supervisor
Dynasoft Administrator


* Entry Date
Mon Jan 13, 2020

* Worked Hours
2

 Save  Cancel



5- Click on Save

 Edit Record

* Required



* Customer
A-Plus Machining

* Project
2019-107 (Test Project 1)

* Supervisor
Dynasoft Administrator

* Entry Date
Mon Jan 13, 2020

* Worked Hours
2

 Save  Cancel

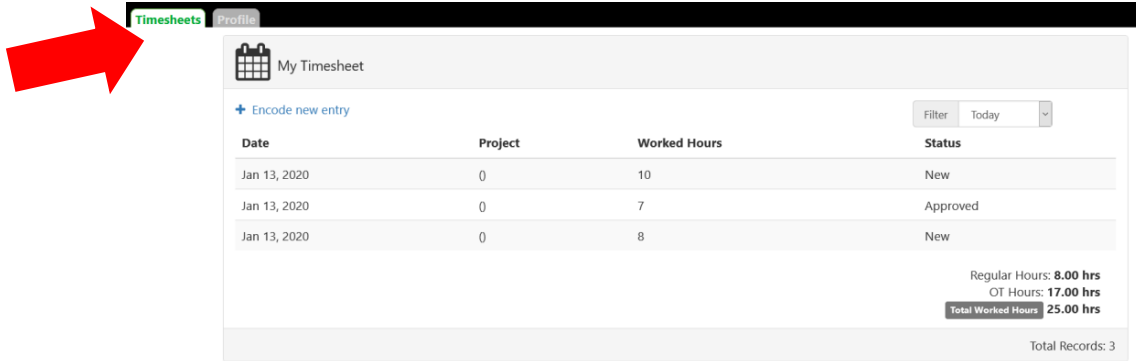


6- Change requests

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

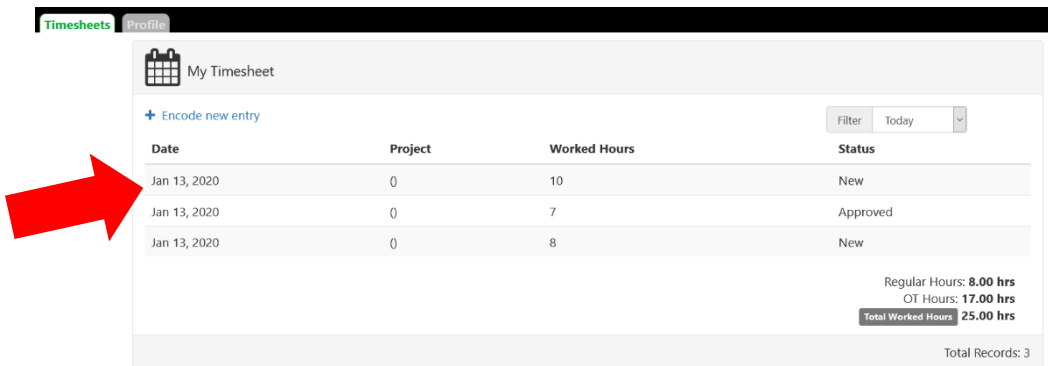


The screenshot shows the 'My Timesheet' interface. At the top, there are two tabs: 'Timesheets' (highlighted in green) and 'Profile'. A red arrow points to the 'Timesheets' tab. Below the tabs, there is a calendar icon and the text 'My Timesheet'. A '+ Encode new entry' link is visible. A table lists timesheet entries with columns for Date, Project, Worked Hours, and Status. A summary box at the bottom right shows: Regular Hours: 8.00 hrs, OT Hours: 17.00 hrs, Total Worked Hours: 25.00 hrs. The total number of records is 3.

Date	Project	Worked Hours	Status
Jan 13, 2020	0	10	New
Jan 13, 2020	0	7	Approved
Jan 13, 2020	0	8	New

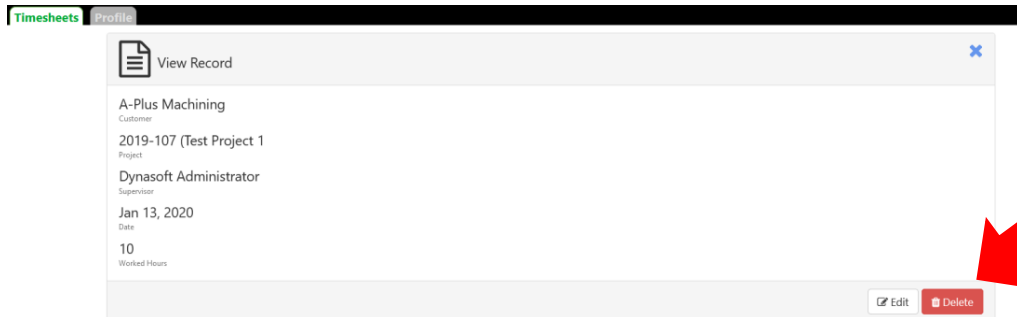
Regular Hours: 8.00 hrs
OT Hours: 17.00 hrs
Total Worked Hours: 25.00 hrs
Total Records: 3

2- Click on the Timesheet you would like to edit



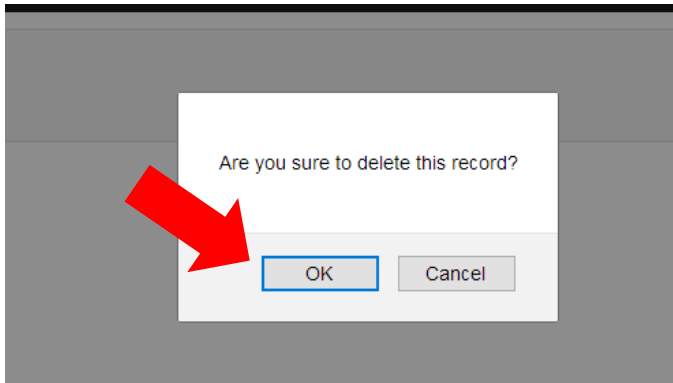
This screenshot is identical to the previous one, but a red arrow points to the first row of the table (Jan 13, 2020, Project 0, Worked Hours 10, Status New).

3- Click on Delete



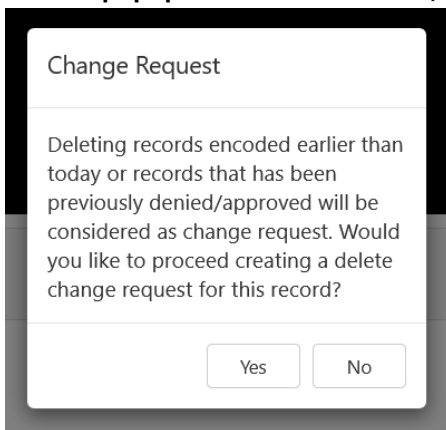
The screenshot shows a 'View Record' popup window. It contains the following information: A-Plus Machining (Customer), 2019-107 (Test Project 1) (Project), Dynasoft Administrator (Supervisor), Jan 13, 2020 (Date), and 10 (Worked Hours). At the bottom right, there are two buttons: 'Edit' and 'Delete'. A red arrow points to the 'Delete' button.

4- A popup will occur asking "Are you sure to delete this record?"

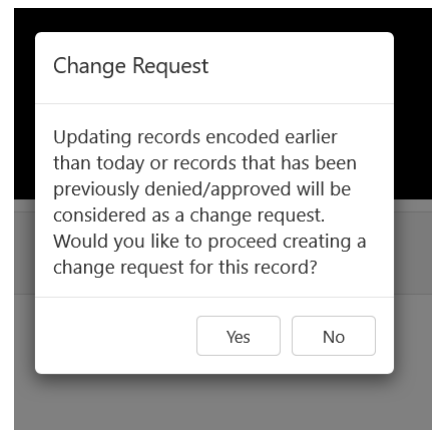


If you are sure click on OK

If the Timesheet has been approved and you are editing or trying to delete the entry you made a popup will show as follows;



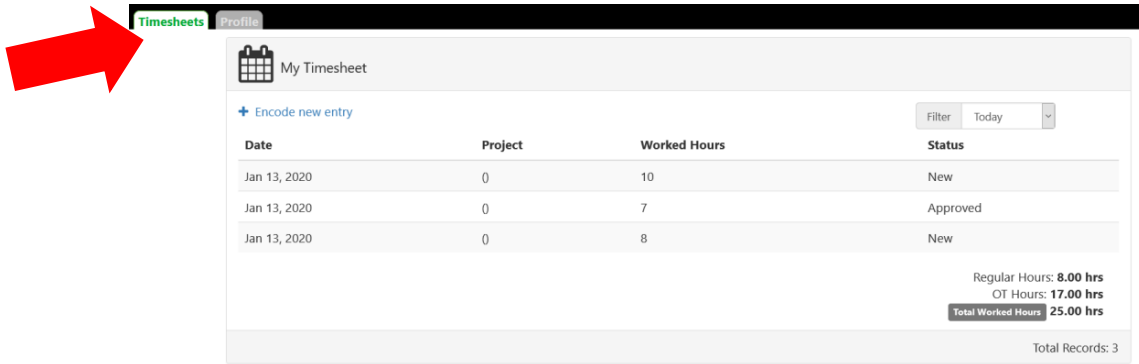
Click on Yes or No as required



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

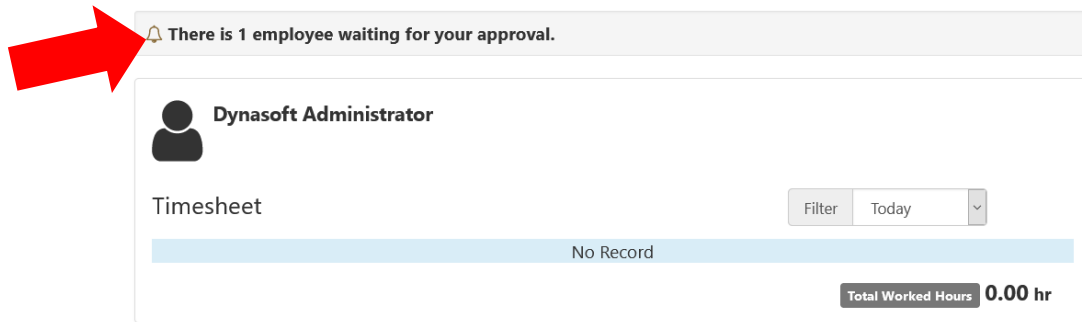
Reviewing Timesheets as Administrator

- 1- Login as Administrator**
- 2- Click on Timesheets Tab**

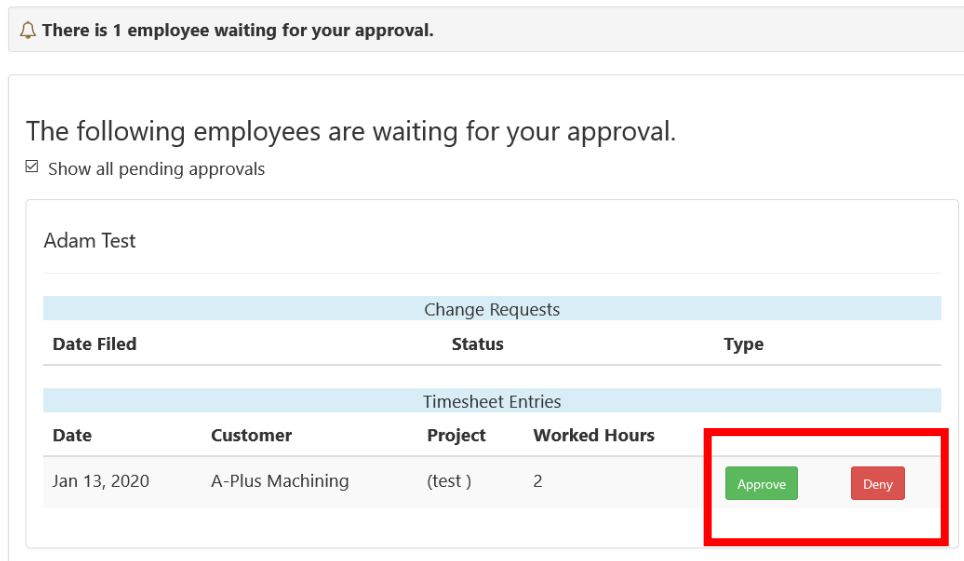


3- If Employees have timesheets entered you will see “There is 1 employee waiting for your approval”

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

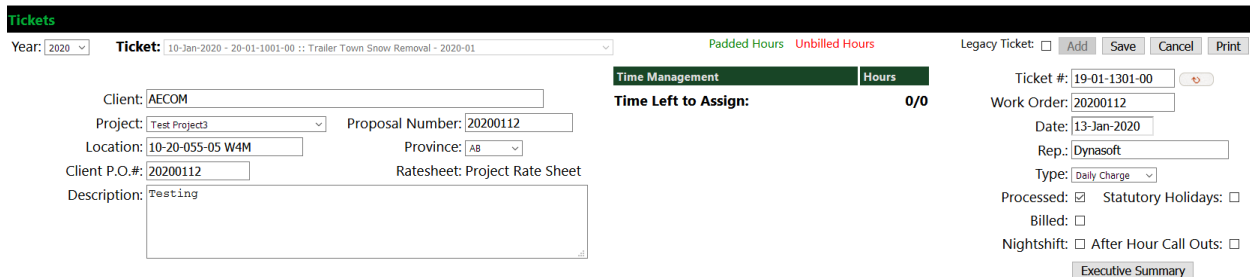


- 2- Click on Add



- 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



Year: 2020 Ticket: 10-Jan-2020 - 20-01-1001-00 :: Trailer Town Snow Removal - 2020-01 Padded Hours Unbilled Hours Legacy Ticket: Add Save Cancel Print

Client: AECOM
Project: Test Project3 Proposal Number: 20200112
Location: 10-20-055-05 W4M Province: AB
Client P.O.#: 20200112 Ratesheet: Project Rate Sheet
Description: Testing

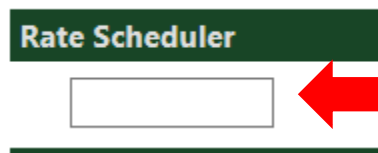
Time Management Hours
Time Left to Assign: 0/0

Ticket #: 19-01-1301-00
Work Order: 20200112
Date: 13-Jan-2020
Rep.: Dynasoft
Type: Daily Charge
Processed: Statutory Holidays:
Billed:
Nightshift: After Hour Call Outs:
Executive Summary

- 11- Click on Save

- 12- Under the Rate Scheduler enter in Unit # for this example we will use 511 and Truck Pups

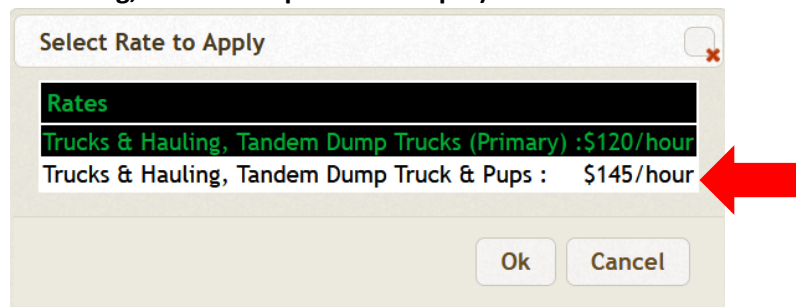
- a. Click on empty box under "Rate Scheduler"



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")



Select Rate to Apply

Rates

Trucks & Hauling, Tandem Dump Trucks (Primary) :\$120/hour

Trucks & Hauling, Tandem Dump Truck & Pups : \$145/hour

Ok Cancel

- 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
<input type="checkbox"/> Trucks & Hauling, Tandem Dump Truck & Pups:511 T200	Administrator, Dynasoft	Administration	<input type="text" value="1"/>	<input type="text" value="145.00"/> /hour	145.00
<input type="text"/>	-- Select an Employee --	-- Select an Occupation --	<input type="text" value="0"/>	<input type="text" value="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
<input type="checkbox"/> Materials & Rental Equipment	Plywood (nelsons) P	<input type="text" value="5"/>	<input type="text" value="150.00"/>	<input type="text" value="15.00"/> / %	862.50
<input type="checkbox"/> Subcontractor Labor	R&D Plumbing and Heating Invoice#39398	<input type="text" value="1"/>	<input type="text" value="1500.00"/>	<input type="text" value="10.00"/> / %	1650.00
-- Select Rate --		<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/> / %	2512.50

- vi. Click on Update

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.