

PROJECT COST MANAGEMENT

BILLINGS USER GUIDE

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# EXERCISES

## **1.1 GETTING STARTED**

## **1.2 INSTALLING BILLINGS**

### 1.2.1 BILLINGS IN THE CLOUD

Open the application from within InEight Platform. Platform's primary function is to let you connect and share data between all InEight applications involved in managing a project. This allows project management workflows to pass between jobsite, field office, and front office seamlessly in a consistent and standardized user interface.

#### **BILLINGS IN THE CLOUD**

Select a project, and then select **Billings** from the Main menu.
 If you are using the legacy Billings application, click the installer download link distributed to you via email by your local administrator.

Design	Open InEight.Billings.Launcher? https://billings-demo.hds.ineight.com wants to open this application. Always allow billings-demo.hds.ineight.com to open links of this type in the associated app
Quantity forecasting	Open InEight.Billings.Launcher
Engineering	
Billings	×
🙃 Estimate 🔥	Launch InEight Billings
Control	The Billings Launcher must be installed to run InEight Billings. If it is your first
Workspaces	launch, or you need the latest version of the Billings Launcher select the download button below.
Project library	This dialog will close in 28 seconds
	Close Download

2. If you are using Billings for the first time, select **Download**, and then select **Next** (or **Open**) to start the one-time Billings Launcher download.



3. If prompted, complete the log in to the applications through your company's log in portal.

4. The InEight Billings launch page opens, and you can begin using Billings in the cloud.

InEight Billings		
<	НОМЕ	DEMO (P
Data Library		
Project Administration	•	
Attendance	· · ·	
Timesheets		
LEMs	• • •	
	×	
Processes	·	
Reports	·	
	·	
Suite Administration	·	
Profile	·	
) Help	· ·	
	: 2024-03-11 2:23 PM Status: Ready	mt2dmoscussql\DTC2-MT2-DMO-SCUS-DB-I8Billings(B) 24.3

### 1.2.2 BILLINGS LEGACY

The Billings application is launched by double-clicking the application icon placed on your system desktop by the installer, after completing the application download via the URL provided to you by your administrator. After the application is launched, the login dialog box may open if you have access to multiple companies, otherwise the application will start.

IOTE	If this is the first time you are running Billings, you will be prompted to complete the
	log in process using your company's log in portal.

Login		
	Account: Password:	
BILLINGS	Company:	Billings Internal 👻
		OK Cancel

Verify that the company you are logging into is correct, and then select **OK**.

When a new version of Billings is available, by your system administrator, you will get a message when you attempt to log into the system. Click Download to update the version. You will not be able to access Billings without installing the updated version.

#### 1.2.3 UPDATING BILLINGS

When a new version of Billings is available, the system will display a message indicating that an update is available when you attempt to run the application. Click the **Download** link on the prompt to launch your browser, and then click **Launch Billings** to update the version. You will not be able to access Billings without installing the updated version.

## **1.3 BILLINGS CONFIGURATION**

### **1.3.1 APPLICATION CONFIGURATION**

The Billings application is configured to meet your specific business requirements, which is typically accomplished when Billings is initially configured by the implementation specialist. However, multiple options still exist for the system administrator to adjust the application as business needs change over time.

Configuration and system maintenance include any of the following functions:

- Drop-down value lists
- Custom field definitions
- System integration schedules
- Billings mobile application rendering configuration

**NOTE** The term **maintaining** in this context means adding new values, editing existing values, or removing no longer needed values.

### 1.3.2 UTILIZING THE SYSTEM CONFIGURATION

Go to Suite Administration > System Configuration.

NOTE Only System Administrators will have access to configure the application.

#### **Billings User Guide**

20 Suite Administration	^
2 User Management	
III Layout Management	
Report Management	
<b>1</b>	
Aaster Data Uploads	

The System Configuration page opens as a new tab with the Field Setup sub-tab selected. This Field Setup tab lets the Administrator create custom fields for any entity which contains a Details tab. Custom fields are primarily created for master data-related entities, found in the Data Library menu, but can also be used for the Projects and Timesheets.

defined fields can be added to various areas for record	ing information specific to your company. Add, remove, and edit them here.			
epet h.				
Target	1. Name	Type	Scope	
* Target: Company (Count=3)				
Company	fruit	Text	44	
Company	017 No.	Text	A	
Company	WG No.	Text	48	
- Target: Cost Code - Global (Count-1)				
Cost Code - Dated	text field	Owte	AL .	
- Target: Cost Code - Project Specific (Count				
Cost Code - Project Specific	vota Phase Code	Text	4	
	Tata Phase Cool	164	*	
<ul> <li>Target: Equipment (Count=1)</li> </ul>				
Eavprient	MI.Resource Owner	Personnel	A8	
+ Target: Personnel (Count+3)				
Personal	Laptop Issued	Tesho	AL .	
Personnel	Cell Phone Issued	Tes/No	4 4 4	
Personnel	Lapitop ID	Text	Al	
<ul> <li>Target: Project (Count + 11)</li> </ul>				
Project	Travel Allowance Taxable?	Tes/No	48	
Project	Project Location/LSD	Text	44	
Project	APE No.	Text	48	
Project	Clerit Ref. No.	Text	48	
Project	(Company) Approval	Text	44	
Project	Clent Approval	Text	48	
Project	Tax Code	feit	48	
Project	Tax Rate	Decival	48	
Project	VI85 Notes	Text	48	

To add a new custom field, click the **Add Row** ribbon bar button. The following entities support custom fields:

- Cost Code Global
- Personnel
- Cost Code Project Specific
- Project and WBS items
- Personnel Classification
- Material
- Equipment
- Material Classification
- Equipment Classification
- Region
- Division
- Time Sheet

#### • Company

Using the drop-down list, you can select which of the Billings entities to add a custom field to and then type in the name for the new custom field in the Name column.

You can click the drop-down list for the Type column and then select how you want the data displayed (such as, Date, Text, MRU Text, Personnel, Yes/No, Integer, or Decimal).

ts				
r-defined fields can be added to various areas fo	r recording information specific to your company. Add, remove, and edit them here.			
eget L				
Target	1. Nane	Type	Scope	
- Target: (Count=1)				
			- Al	
* Target: Company (Count=3)		Description		
Congany	Ind	Date	4	
Company	057.766	Text	2	
Company	101%	Yes/No	4	
- Target: Cost Code - Global (Count - 1)		2-teper		
		Decimal		
Cost Code - Global	text field	HRU Text	48	
<ul> <li>Target: Cost Code - Project Specific  </li> </ul>	(Count=1)	Personnel		
Cost Code - Project Specific	Vota Phase Code	*	AL	
+ Target: Equipment (Count+1)				
faarvert	PR.Resource Owner	Personnel	AL .	
Target: Personnel (Count = 3)				
Personal	Laster Inwed	Tesho		
Personnel	Call Prone Issued	Ten/Im	3	
Personal	Lettre ID	Text	44	
- Target: Project (Count - 11)				
Project	Travel Allowance Taxable?	Texho	44	
Project	Preject Location A SD	Text	44	
Project	AFE NO.	Text	48	
Project	Clert Ref. No.	Text	48	
Project	(Company) Approval	Text	44	
Project	Clerit Approval	Text	44	
Project	Tax Code	Text	48	

For certain entities, such as Project, you can also configure the "Scope", that is, whether the custom field applies to the entire project entity, to the Project only, or to the WBS items contained within the project.

To delete any of the custom fields, you can highlight the item and click the Delete Row(s) button from the home ribbon menu.

When complete, you can click the **Apply** button, or to exit the dialog box, you can either click the **OK** button along the bottom right-hand side to save your changes and exit or click Cancel to exit without saving changes.

### 1.3.3 SUITE ADMINISTRATION

#### 1.3.3.1 USER MANAGEMENT

To access user information from the Main menu, click Suite Administration > **User Management.**Only an Administrator can access the Suite Administration or the User Management functionality.



The User Management tab opens listing all users in the system.

📃 InEight Billings		- 0 X
	HOME	DEMO (PTR2)
Data Library	D Paste	
Project Administration	Add Row Delete Refresh Row(s) ↔ Delete Special ↔ Undo	Layout Close
^	Actions Edit	Window ^
Attendance	User Management	Ψ.
Timesheets	The security manager allows you to add, edit, and delete users. Double clicking on a user will allow you to set their password and edit their permissions.	
E LEMs		
	Drag a column header here to group by that column User Name Name Status	Q
Processes		
	→ Active	
Reports	Active	
	Active	
	Active	
	Active	
Suite Administration	Active Active	
00.00	Active	
2 User Management	Active	
Layout Management	Active	
	Active	
Report Management	Active	
2	Active	
TL+ System Configuration	Active	
↑ Master Data Uploads		
<u> </u>	: 2024-03-14 11:55 AM Status: Ready mt2dmoscussq\DTC2-MT2-DMO-SCUS	-DB-18Billings(B) 24.3.24065.01

When new users are added through Platform, they are automatically created in Billings as a standard user, provided the appropriate suite and application access is granted through the InEight suite Roles and Permissions. User authentication is performed through the customer's Active Directory or Google security validation, including any MFA requirements, therefore no Billings-specific password is required. Once a user exists in the system, the Administrator can enlist the user in Billings user types

and groups, as well as grant the user access to one or more regions. You can open a user record to define its settings by double clicking on the user from the list.

(2) User	×
General Permissions System Processes Mobile Project Security	
User Name:	
Name:	
E-mail:	
Status: Active	Ŧ
Password:	
Confirm Password:	
Enforce password policy	
Enforce password expiration	
User must change password at next login	
Created: Modified:	

NOTE You must have a status of *Active*, be a member of at least one security role, and have access to at least one Region before the system will allow you to complete the login process.

#### 1.3.3.2 PERMISSIONS TAB

As an administrator of the system, you control the type of functional access the user will have and can restrict access to data by region utilizing the Permissions tab. Roles allow you to control which functions of the system the user will be able to utilize. More than one Role can be associated with a user. Regions allow the Administrator to control which data in the system the user will be able to see or operate on, as constrained by the Role membership defined above.

General	Permissions	System Processes	Mobile Project Security					
General	remissions	System Processes	Mobile Project Security					
User permi	ssions are determ	ined by both the roles a	assigned to them and the regions wh	ere those roles are effective.				
Roles								
	- Ben	ove existing user roles	or add user roles from the available	roles list				
6		love existing data folda		loto list.				
User F	oles:				Available Roles:			
					Administrator			
					Certification Power User			
					Certification User			
				<< Add	Certification User (Read Only)			
				Remove >>	Expanded Process Editing			
					Expanded Project Editing Expanded Timesheet Editing			
					Imports User			-
Desta								
Regior			ns or add user regions from the ava	lable sectors list				
	hei	love existing user regio	ris of add user regions from the ava	able regions list.				
User F	egions:				Available Regions:			
					Default			
				<< Add				
				Remove >>				
						ОК	Cancel	Apply
						UK	Cancel	Apply

#### 1.3.3.3 SYSTEM PROCESSES TAB

On the System Processes tab, you can control the types of imports, exports, and adjustments the user can execute. To grant access to any process, check it off using the check box located next to the process description.

	Permissions	System Processes	Mobile Project Security							
ranting djustme		ss to user will allow use	r to perform Export, Impo	rt, or						
ocesse	5									
	Туре	Description								
		Audit Trail Maintenanc								*
	Adjustments	Actuals Task Transfer								
	Adjustments	Retro Rate Adjustment								
	Imports	Classification Import								
	Imports	Equipment Import								
	Imports	HardDollar Project Imp	ort							
	Imports	LEM Import								
	Imports	Material Import								
	Imports	Personnel Import Project Import								
	Imports Imports	Rate Table Import								
	Imports	Timesheet Import								
	Imports	Action Group Integratio	n Import							
	Imports	Action Integration Impo								
	Imports	Application Integration			-					
	Imports	Control CBS Integration								
	Imports	Control Payltems Integ								
	Imports	Craft Integration Import								
	Imports	Employee Integration I	mport							
	Imports	Equ Category Integrati	on Import							
	Imports	Equipment Integration	Import							
	Imports	Equipment Type Integr	ration Import							
	Imports	External Code Value In	tegration Import							
	lasa a da	Estampl Line Reve late								*

Select the **OK** or **Apply** button to save any changes. This will return you to the main User Management tab.

#### 1.3.3.4 REGIONS

Regions are used to manage what users can see within Billings. If a user has permission to a Region, they can see all resources, rate tables, projects, time sheets, LEMs, and Invoices associated to the Regions they have permission for.

## 1.4 BILLINGS ADMINISTRATION

#### 1.4.1 USER ACCOUNT MANAGEMENT INFORMATION

There are thirteen user roles or groups in Billings and five specialized roles for more security control. A single application user can be a member of one or more roles, which determines the functional areas

of the application that they have access to. The following defines the thirteen groups:

User Role	User Role Definition
Administrator	The user designated as the technical application lead within the system. This role manages the application security and users interaction with the system through user groups. Members of this group can perform all functions on all pages.
Power User	User designated as the highest privileged user for their own region. This role manages the setup of Billings and how it will affect reporting, payroll, and integrations, and ensures the application is aligned to client requirements.
Report Administrator	User who has a deep understanding of Billings as well as the technical knowledge to build reports using the Billings report manager. This role can be used as a standalone for someone who only needs to access the report manager to build reports or can be used in addition to any other role that needs access to the report manager.
LEM Approver/Reviewer	A user who can approve LEMs. This role is unable to create, edit, or delete LEMs, but they can complete all functions (except crediting an invoice) that take place after a LEM is created
User	User designated as having a higher skill set with capabilities to set up information in Billings as needed.
Time sheet Entry	User designated as having limited involvement in setting up information in Billings.
User (No Rates)	User level access to Billings except for access to rates information on rate tables, time sheets, and reports.
Supervisor (View Only)	User designated to have view only and report generating rights in the application.
Imports User	User who is monitoring or performing imports into Billings. This role can be used standalone for someone who only needs to access these functions or can be used in addition to any other role that needs access to perform imports.
Certification Power User	User who manages the overall tracking of certification information, such as someone in HR or a corporate safety officer. This role can be used standalone for someone who only needs to access the

#### 1.4 Billings Administration

User Role	User Role Definition
	certification module or can be used in addition to any other role that needs access to the certification module.
Certification User (Read Only)	User who only requires access to the certification information but is not authorized to make changes, such as a Project Manager or Supervisor. This role can be used stand alone for someone who only needs to access the certification module, or can be used in addition to any other role that needs access to the certification module.
Project Accountant	User who manages running data exports and adjusting exported data.

Specialized User Role	Specialized User Role Definition
Share Layouts	Gives a user the ability to share their personalized layouts with other users. The members of this role cannot administrate layouts for others, only their own.
Expanded Time sheet Editing	Gives a user the ability to edit or delete export batches (including LEMs and Invoices) created by other users, if the user has the right to create one or more Export batches themselves. This means they will be able to edit/delete batch results created by other users for types that they have access to already. Note that this functionality is already available to all Power Users and Administrators. This specialized security role simply gives the ability to edit or delete export results batches created by other users, and removes Approval Status restrictions, elevating these rights to be equivalent to the Power User role (but NOT the Administrator role).
Expanded Export Editing	Gives a user the ability to edit or delete timsheets created by other users. This means they will be able to edit/delete timesheets created by other users . Note that this functionality is already available to all Power

Specialized User Role	Specialized User Role Definition
	Users and Administrators. This specialized security role simply gives the ability to edit or delete timesheets by other users, and removes Approval Status restrictions, elevating these rights to be equivalent to the Power User role (but NOT the Administrator role).
Restricted Export Editing	Gives a user the ability to edit or delete export batches created by other users, if the user has the right to create one or more Export batches themselves (that is, they will be able to edit/delete batch results created by other users for types that they have access to already). Unlike the Expanded Export Editing above, this role does NOT allow users any added rights over the Approval Status.
Mobile User (for use with the standalone client only)	User cannot use the desktop system, but can capture personal time sheets using the mobile client
Mobile Foreman (for use with the standalone client only)	User cannot use the desktop system but can capture attendance and time sheets for themselves and their crews using the mobile client. This only applies to stand-alone mobile customers.

## 1.5 HELP MENU

## **1.6 HELP OPTIONS**

#### 1.6.1 CONTACT BILLINGS SUPPORT

If Billings Support is needed, click the Help icon and select Contact InEight Billings Support.



A blank e-mail to support@ineight.com will be opened using the default email application installed on the desktop. You can enter in a full description of the issue including the following details:

- What user is having the issue
- Screenshots of the error and the window it is occurring in
- The time sheet #, LEM# and/or the Invoice #

• If it's an error with a report, what report it is, and what parameters were used when requesting the report.

• User contact information (e.g., Phone number, e-mail address)



#### 1.6.2 VERIFYING BILLINGS VERSION INFO

To find the application version information for Billings, got to Help > **System Info**.

The following window appears providing details on the version and the Billings website link.

About Intight Billings O		· · · · · · · · · · · · · · · · · · ·
	betyph tillings Version: 22, 312, 0 Govrých (d. 2023). Folght Inc. Af offst reserved. Distabase fixere: INGOTOQU, 31 (BLLIRGDOY) Distabase fixere: Bifnyd Hety. (f), 300, 21, 77, Bifnyd McDistabase fixere: Bifnyd AED fort. CTC, Rugh / Raportheliper / HeavyO-22, 12.0.0	
Contact Us: https://www.inEight.com/		x

Click **OK** at the bottom of this window to exit.

#### 1.6.3 REFRESH CACHE

The Refresh Cache function allows the users to trigger a complete refresh of the locally cached reference data. This includes, named resources, list of vendors and suppliers, classifications (trade and craft) and category and type equivalent in Platform.

## **1.7 NAVIGATION**

## **1.8 BILLINGS NAVIGATION**

#### 1.8.1 NAVIGATION MENU

When opening Billings, the navigation list is collapsed. To view the menu items for navigating through Billings, there are 2 options:

Option 1: Expand the menu by clicking the double arrow at the top left corner of the Billings window, as shown in the image below. This will expand the menu to provide the name for each menu grouping; you can then click the down arrow to open the list of items within each grouping (alternatively, click the up arrow to collapse the grouping list).



Option 2: With your mouse, hover over the icon to see the grouping name, then click the desired icon to provide you with the list of the items within that grouping.



### 1.8.2 OK, APPLY, AND CANCEL BUTTONS

You will notice the OK, Apply, and Cancel buttons are available on most of the Billings data maintenance pages. Pressing Cancel exits the page and discards any changes that you have made. The functionality of the OK and Apply buttons differs slightly depending on whether you are creating a new record or modifying an existing record. In both cases, pressing either of the buttons saves your changes to the database. However, if you are adding a new record, pressing Apply not only saves the data to the database, but also refreshes the page to let you enter yet another record. Clicking OK saves the data but then exits the page. This is to maximize the data entry speed by allowing you to add multiple new records without needing to exit the page.

#### LIST / GRID MODIFICATION

If there are columns that you do not require, you can remove them with the following steps:

- 1. Select the column header by clicking and holding the mouse button down.
- 2. Drag it downwards until you see an "X" appear.
- 3. Drop it by releasing the mouse button and the column will be removed.
- 4. Repeat this step for all the columns you would like removed.

Perform the following steps If you would like to retrieve a removed column or any other columns which may not be visible by default.

- 1. Right click anywhere on the column header row to bring up a pop-up menu.
- 2. Select Column Chooser. A Customization window opens.
- 3. Click and hold the mouse button on the field you require.
- 4. Drag and drop the field to the column position where you would like it to appear on the grid.

NOTE You have to drop it in the header section of the page.

### **1.8.3 FILTER FUNCTIONALITY**

When opening a page within Billings which contains a grid, an auto-filter feature is available. This feature is available with pages containing the following data:

- Timesheet
- LEM
- Invoice
- Project
- Rate Table
- Company
- Cost Code
- Equipment
- Personnel
- Region
- Division

Each of these pages includes a row directly under the column header row dedicated to filtering. In this row, you can narrow the list by entering in specific criteria (e.g., T/S Number, LEM number, Project Name, etc.). A filter icon appears in each column header when the mouse is placed over the column. If a filter is activated, the icon is highlighted. If the filter icon is clicked, the filter can be automatically adjusted by selecting from the options of Custom, Blanks, or Non-blanks.

#### EDIT FILTERS

In the bottom right corner of the page, you can select the Edit Filter button to adjust the default filter settings.

1. Select Edit Filter.

Edit Filter

- 2. Click the And button to select any of the following options:
- And
- Or
- Not And
- Not Or

Filter	Editor		×
And	+ ×		
00	And	d	
63	Or		
œ	Not And		
03	Not Or		
		OK Cancel Apply	

- 3. Click the **Plus** button beside the And button to select one of these options:
- Add Condition

#### Add Group

Filter Editor	×	
And + ×		
S T. Add Condition		
🚽 Add Group		
		_
	OK Cancel Apply	

Within this row, each character can be edited.

Another option when retrieving data is the Quick-Type feature. This lets a user open an existing list and begin typing in the first characters of the word. Billings will automatically begin to filter the list by these characters. The example below is searching LEM Numbers by the letter s. Billings will display all LEMs beginning with this character.

#### **1.8.4 UTILIZING LAYOUT MANAGEMENT**

To access the Layout Manager from the Main menu, select Suite Administration > Layout Management.

NOTE Only System Administrators will have access to configure the layouts for other users.

#### **Billings User Guide**



The Layout Management page appears. The Layout Management tool is user specific. This means any layouts listed in the window are layouts the logged-in user has previously created and saved through the various page's Layout ribbon bar functionality, or layouts that have been shared with this user.

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From the General tab, you can view the available layouts and delete any layouts that are no longer required. To delete a layout, highlight the line item by clicking on it, then click the **Delete Row(s)** icon located on the ribbon menu.



Click the View tab to view the basic outline of the selected layout. Any changes made to the layout from this preview will not be saved; this is strictly for viewing purposes. All changes must be done from the page to which the layout applies.

NOTE If you are viewing a time sheet layout, you must be in the time sheet page to change the layout

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Click **Apply** or **OK** on the bottom right to exit the Layout Management window.

## **1.9 DATA LIBRARY**

## 1.10 CLASSIFICATIONS

### 1.10.1 CREATE A NEW PERSONNEL CLASSIFICATION

Billings will receive all operational resources associated to personnel, including Trade and Craft lists, from InEight Platform. Both Trade and Craft will populate the Personnel Classification library. However, it may be necessary or desirable to add additional classifications or organize the Trade and Craft items received from Platform into a deeper structured format.

#### CREATE A NEW PERSONAL CLASSIFICATION

1. Open the Data Library menu item and select Classifications > **Personnel**.

~ C Refresh	Copy Cut	Show Active Only
Actions	Edit	Tree
Regions	Personnel Classification	0
+ Add	Remove Q Find	
→ v Per	sonnel (Emp)	
· ·	.KC_Labourer - Intermediate (KC	-LBIN)
>	.KC_Labourer - Junior (KC-LBJR)	
>	.KC_Labourer - Senior (KC-LBSR)	
> >	.KC_Superintendent (KC-SUP)	
	Refresh Actions Regions	Refresh       Paste       Dundo         Actions       Edit         Regions       Personnel Classification               Add       K emove             → Add       K emove       Q Find            → KC_Carpenter 1 (KC-CP1)       .KC_Carpenter 2 (KC-CP2)       .KC_Carpenter 4 (KC-CP4)            × KC_Labourer - Intermediate (KC-C)       .KC_Labourer - Senior (KC-LBIR)            × KC_Labourer - Senior (KC-LBSR)

2. The Personnel Classification tab appears. This tab lets users view all records and create new or edit existing personnel classifications that were configured for billing purposes.

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> Carpenter (PD-CP)				
> Feid Hanagement (F0-H0)				
> Peid Supervision (PD-0P)				
> Hone Office, Administration (HO-40MI)				
> Trans Office, Extinuition (HD-857H)				
> Hone Office, Executive (HO-EXEC)				
> Itore Office, Hanagement (HD-HEHT)				
<ul> <li>Hone Office, Operations (HO-OPRS)</li> </ul>				
> Itana Office, Project Cantrola (HD-PRUC)				
Hone Office, Projects (HO PRID)				
> ban Warker (PD-201)				
> Liboury (FD-LB				
<ul> <li>Mikergitz (PD-MIL)</li> </ul>				
> Operator (FO-OP)				
> Psychiae (PC-PP)				
> QAQC F0-QC				
5 Safety (PD-07)				
> Warehouse (PD-WH)				
> mailer (10-00)				

3. Right click the **Personnel (Emp)** icon and select **Add Classification** from the dialog box or click the Add button located just above the list of classifications.

V P	ersonnel (Emp)		
5	.KC_Carpenter : 📀	Add Classification	
$\rightarrow$	.KC_Carpenter 2	Collapse	
$\rightarrow$	.KC_Carpenter 1		
$\rightarrow$	.KC_Carpenter 4	Full Expand	
$\rightarrow$	.KC_Labourer -1 :	Full Collapse	
	.KC_Labourer - :	Expand To Level	
$\rightarrow$	.KC_Labourer - 5	Expand to Level	
	.KC_Superintenc	Collapse To Level	
	.KC_Welder - B Pres	ire (KC-WDBP)	
	.KC_Welder - CWB (	C-WDCW8)	
	Carpenter (FD-CP)		

4. On the General tab, enter the Description and Code. The Status field automatically defaults to *Active* and the Parent field is grayed out and will automatically default to the appropriate parent node from the classification tree.

General	Details	
	Name: Code:	New
	Status : Parent :	Active * .KC_Carpenter 1 (KC-CP1)
	Created : Modified :	

5. You can create classification structures by dragging and dropping individual classifications into other classifications, building up a tree or folder-like structure. This lets you group classifications.

6. Click the **Details** tab. This section is used to capture custom field values.

7. Click **Apply** or **OK** at the bottom of the page to save your changes.

### 1.10.2 CREATE A NEW EQUIPMENT CLASSIFICATION

Billings will receive all operational resources associated to equipment including the Equipment Category and Types lists from Platform. Both Category and Type will populate the Equipment Classification library. However, it may be necessary or desirable to add additional classifications or organize the Category and Type items received from Platform into a deeper structured format.

#### CREATE A NEW EQUIPMENT CLASSIFICATION

1. To create a new Equipment classification, open the Data Library menu and select Classifications > **Equipment**.

Image: Construction     Amage: Construction       · Image: Construction     - Image: Construction       · Image: Construction     - Image: Construction       · Image: Construction     - Image: Construction
→ ∰ Resources
<ul> <li>Classifications</li> </ul>
22 Personnel
<b>ដូល្</b> Equipment
Material
Companies
Cost Codes
🚱 Regions
Divisions
Locations
Certifications
Certification Types
🛠 Project Administration 🗸 🗸

2. The Equipment Classification tab appears. This tab lets you view all records or create new and edit existing equipment classifications that were configured for billing purposes.

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3. Right click the Equipment icon and choose **Add Classification** from the menu or click the **Add** button located in the ribbon menu above.

) Add	d 🗙 Remove 🔍 Find		
<b>√</b> E	iquipment (Equip)		
$\rightarrow$	.KC_Excavator 10-19 MT (KC-EX1	Add Classification	
$\rightarrow$	.KC_Excavator 1-5 MT (KC-EX1.5)	Collapse	
$\rightarrow$	.KC_Excavator 20-25 MT (KC-EX2	Full Expand	
$\rightarrow$	.KC_Excavator 26-29 MT (KC-EX2		
$\rightarrow$	.KC_Excavator 30-35 MT (KC-EX3	Full Collapse	
$\rightarrow$	.KC_Excavator 36-39 MT (KC-EX3	Expand To Level	
$\rightarrow$	.KC_Excavator 50-59 MT (KC-EX5	Collapse To Level	
$\rightarrow$	.KC_Excavator 5-9 MT (KC-EX55.	compse to bever	
$\rightarrow$	.KC_Excavator 80-89 MT (KC-EX80.89)		
$\rightarrow$	.KC_Pidup 1/2 Ton (KC-PU1.2CC)		

#### 4. In the General tab, enter the **Description** and **Code**.

General	Details	
	Nanei	
	Coder	
		1.00
	Status I	Active *
	Paraent :	Epiperent (Toky)
	Oreated (	
	Modified (	
		OK Canod Apply

5. Click the Details tab. This section is used to capture custom field values. Populate any custom fields per your organization's requirements.

6. Click **Apply** or **OK** at the bottom of the page to save your changes.

### 1.10.3 CREATE A NEW MATERIAL CLASSIFICATION

#### CREATE A NEW MATERIAL CLASSIFICATION

1. Go to Data Library > Classifications and then Material.



2. The Materials Classification tab appears. This tab lets you view and edit all material classifications currently in the system.

3. Right click the Material and select **Add Classification** from the resulting menu or click the **Add** button located in the page's ribbon menu.

Name			Code	Туре
> >	laterial		Mat	
	Piping		PIP	
	Structural		STR	
	Electrical		ELE	
	Civil		CIV	
>	Utility Poles		UTLPOL	
	New			MATCAT
		<ul> <li>Add Classification</li> </ul>		
		X Delete Classification		
		TTT Full Expand		
		‡= Full Collapse		

4. In the General tab, enter the **Description** and **Code**.

5. Click the **Details** tab. This section is used to capture custom field values. Populate any custom fields per your organization requirements.

6. Click **Apply** or **OK** at the bottom of the page to save your changes.

## **1.11 RESOURCES**

### 1.11.1 CREATE NEW PERSONNEL RESOURCES

Billings will receive all operational resources associated to personnel from the Master Data Library within Platform.

#### CREATE A NEW PERSONNEL RESOURCE

1. To create an additional resource, that will be used for purposes of customer billing only, go to Data Library > Resources > **Personnel**.
| InEight Billings (Billings Internal) |     |             |                  |              |                  |             |  |
|--------------------------------------|-----|-------------|------------------|--------------|------------------|-------------|--|
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| <u> fin</u> Data Library ^           |     | -+          | □×               | С            | 🖨 Print          | F           |  |
| v 🖒 Resources                        | Add | Row         | Delete<br>Row(s) | Refresh      | 😂 Print Prev     | iew Send To |  |
|                                      |     |             | Actions          |              | Print            | Save        |  |
| Personnel                            | Pe  | rsonn       | el Resou         | rces O       |                  |             |  |
| 🔏 Equipment                          | Dra | g a col     | umn head         | er here to g | roup by that col | mn          |  |
|                                      |     | Code        |                  |              |                  | Last Name   |  |
| Material                             | т   | <b>ا</b> ۵: |                  |              |                  | ×0:         |  |
| Classifications                      |     | 1013        |                  |              |                  | Atkinson    |  |
|                                      |     | 10-49       |                  |              |                  | Blundell    |  |

2. The Personnel Resources tab appears. Click the **Add Row** icon on the ribbon bar.

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- 3. The Personnel window opens. Enter the employee's last and first name in the appropriate fields.
- 4. Assign a personnel code in the Code field.

**NOTE** The Code must be unique within the database. As a best practice use your organization's internal code for the individual.



5. Click the drop-down arrow on the field labeled Source. This field lets you label the resource as a subcontractor, employee, third party or any other description previously set up by the system administrator.

Source:		
Billing Classification:	Subcontractor	
Cost Classification:	Employee	
Company:	DSP	
Region:	Third Party	
Payroll Status:	FAC	
Shift:		
Status:	×	

6. Click the ellipsis (three dots) icon in the Billing Classification field. A Classification dialog box appears. Select the Employee's classification by double clicking on it.

NOTE You can use the Search feature at the top of the pop-up to search for the classification using either the name or the code.

> 0	anni (ang)
	6C_Carpenter 1 (6C-CP1)
> 2	KE_Carpenter 2 (KE-CF2)
> 3	KC_Carpenter 3 (KC-CP3)
> 3	KL_Carpenter 4 (KL-CD-6)
	KC_Labourer - Entermediate (KC-LBEr)
> 3	KE_Laboure - Aurior (KE-4.5.93)
	KC_Labourer - Senior (kC-L89R)
> 3	KL_Superintendent (KL-SUP)
	KC_Welder - 8 Hessure (xC-WD8Y)
> 3	KC_VMder - CNB (KC-WDCNB)
> 0	larpenter (F0-CP)
> 7	ield Management (PD-445)
> F	ield Supervision (PD-SP)
> H	kane Office, Administration (HC-ADMI)
	tane Office, Estimation (HO ESTR)
	lane Office, Decutive (HO-ODC)
> 8	tano Office, Management (HD-M2HT)
	Ione Office, Operations (HO-GPR5)
	tane Office, Project Controls (HO H9UC)
> H	Jone Office, Projects (HS-PR.CJ)
> 0	Inn Worker (FC-111)
	abourer (FD-LE)
	Nirrgit (*C-MN)
	(perator (FO-OP)
> P	pefitu (PC PP)
	24QC FP-QC
	afety (PC-27)
> 1	Varehouse (FD-WH)
> 1	Valder (PC-VO)

7. The Cost Classification field will replicate the classification chosen in the Billing Classification field. However, this can be changed if required by clicking on the ellipses icon in the Cost Classification field and updating accordingly.

8. Click the ellipses icon in the Company field. This field lets users assign a worker to the company for which they work for.

As an example, if the employee works directly for ABC Company, select ABC Company as the company name. If the employee is a subcontractor working for Al's Contracting Services, select Al's Contracting Services as the company the worker works for.

9. Scroll through the list or use the Search field and type in the name of the company the worker is working for. Double click to select the appropriate company.

	Name	Code	Relationship Type	Status	τ.
Υ	* <b>D</b> :	<ul> <li>••••</li> </ul>	-O:	- Active	
	Company	COMP	Owner	Active	
	SemCAMS ULC	1063	Client	Active	
	Ovintiv Canada ULC	1031	Client	Active	
	Canadian Natural Resources Limited	1061	Client	Active	

10. Click the ellipses icon on the Region field. A Region window appears. Scroll through the list or type in the region name in the Search field. This associates the worker with a default region.

	Name	Code	Status	
r	4 <b>0</b> ¢	10: 	- Active	
	Alberta	AB	Active	
	British Columbia	BC	Active	
	Payroll (EMP & DSP)	PAY-EMP.DSP	Active	

11. Click the drop-down arrow of the Payroll Status field and select if the person is On Payroll or Off Payroll. The value selected here is used to determine if this person's hours should be sent to the payroll system.

Payroll Status:		*
Shift:	On Payrol	
Status:	Off Payrol	
Shift Rotation:		
Notes:		
	×	

12. Click the drop-down box on the Shift field. A selection of Day, Night, or Other shift appears. Select the default shift type the employee typically works.

NOTE You can always indicate the actual shift worked when time is captured for this worker on a time sheet. This often happens when a worker is temporarily working a different shift from what their master personnel record is set to.

Shift:	Day	-
Status:	Day	
Shift Rotation:	Nght	
Notes:		
	×	
		-

Shift Rotation:		w
	20/8	
Notes:	14/7	
	7/7	
	8/6	
	5/2	
	10/4	
	24/4	-
	×	

13. Shift Rotation is not required but can be added if there is a need to include this information on Billing reports. Click the drop-down box on the Shift Rotation field. A selection from the Options window appears. Select the default Shift Rotation the employee typically works. Shift Rotations are defined in the Options menu under Drop-Down List Setup > Shift Rotation Type.

14. Click the **Details** tab. This section is used to capture custom field values. Populate any custom fields per your organization requirements.

## 1.11.2 CREATE A NEW EQUIPMENT RESOURCE

Billings will receive all Operational Resources associated to Equipment from the Master Data Library within Platform.

#### CREATE A NEW EQUIPMENT RESOURCE

1. To create an additional resource that will be used for purposes of customer billing only, go to Data Library > Resources and then **Equipment**.



2. The Equipment Resources tab appears. click the **Add Row** icon on the ribbon bar.

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217-	Doi: All-Rapper Diretti	Aberte	Owned	Domestic alloh - Roow Denis	1.2.4	215	
201-	Exc. Alt - Veraling Campachar	Alter is	Owied	Encircelar alloh - Herolog-Compactar	August .	20	
306-	Subbeautr - 511 null your black	Aberta	Owned	Seletown - Dd will one black	6/214	306-	
201-	falidation - OH w/k water blacks	aberta	Owned	fabilioon - Di wili wax Made	8,2+4	207	
2th	Subbaan -56 s.Stringing from	Alterta	Owned	Seletious - D1 scStringing Room	ficture .	21b	
100-	Trade - 107 cF Crew	Aborta	Owned	Prod LOF of Drew	8.2-1	20	
105-	Trush = 1/07-17 Crew	Alteria	Owied	Truck - UST-UT Dave	1/2/2	105-	
104-	Inak - 107 cF Orew	Aberta	Owned	Brack - 1/27-17 Onew	4.2-1	106-	
107-	Truli - 1/07-07-0mw	Alter Ta	Owned	Trulk - UCT-CT Daw	India	107	
110-	Inak - USF 67 Grav	Alber to	Owned	Brack - USP-UP Draw	4.2-4	118-	
201-	Trush - 1/07-07-0mm	Alberta	Owned	Truck - UDT-UT Daw	6/214	30-	
802	Inak - 107-07 One	Aberta	Owned	Truck - USP-OF Drew	8,2+6	80	
803-	Truck - U/P -(7 Cmu	Alberts.	Owned	Truck - USF-IF Crew	Active .	405-	
202	Trade-12 Teal	aborte	Owned	Invalid - U/271 UT Draw	8/2+6	202	
211-	Truck - 17 Test	Alber for	Owied	Truck - (FTruck	Active .	210-	
100-	Inada - 1227 47 Grave	Aberte	Owned	Truck - LOP OF Draw	Inches	109-	
112-	Truth - 17-07 Police	Alber for	Owned	Truck - 17-17 Protect	10.714	105	
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140-	Tradu-121-221 Proban	Aberta	Owned	Inak- IP dT Inder	Act + 8	14	
147-	Trute - (1-21 Polier	Aberts	Owned	Truck - UT-DT-Poller	6:5+8	140-	
140	Truli - 17-27 Police	Alberta	Owned	Trail-12-27 Police	8/214	140	
121-	Trulk - (1-21 Polier	Aberts	Owned	Truck - (7-27-hder	4/5×8	100	
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140-	Poter - Ulf w/trailer	Aberta	Owned	Peter - 187 s/trailer	6/214	149-	
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411-	2xxx+3xxx+ 2000 @	Aberts	Owned	2mm-boom - 2000-b-	4:5+8	40	

3. The equipment setup window opens. Enter in the name of the unit in the Name field.

General Details 5		
A		
Codes		
Source:		
Description:		
Biling Caselforters Cost Caselforters		
Company		
Region		
Location/Fands		
Cost Rate Table:		
Stelluro	Adling	
Serial Number:		
Purchase Order #1		
Notes:		
Orested		
Hodfed		

4. Enter in the unit number for the piece of equipment in the Unit # field and the unit code in the Code field. While these can be the same, they do not need to be. The Unit # is typically matched to the equipment placard, while the code is typically matched to that equipment's accounting code designation.

5. Click the drop-down arrow on the Source field. This field lets you label a piece of equipment as belonging to an operator, owned, third party, subcontractor or any other custom description previously set up by your system administrator.

Source:		w
Description: Billing Classification: Cost Classification: Company: Region: Location/Yard:	Employee Owned Owned Third Party Subcontractor DSP Owned	
Cost Rate Table:	×	

6. Click the ellipses (three dots) icon in the Billing Classification field and the Cost Classification field. A Classification window appears. Select the unit's classification by double clicking on it.

NOTE You can use the Search feature at the top of the pop-up to search for the classification using either the name or the code.

	ment (Equip)	
> .XI	K., Excernator 10-19 MT (VC-EX10.19)	
> 30	K_Example 1-5 MT (KC-EX1.5)	
> .00	K., (Societar 20-25 MT (ICC-6) 22.5)	
> 30	K_Excenter 25-23 MT (KC-EX25, 23)	
> 30	K., Excevetor 30-35 MT (KC-8X30.35)	
> 30	KExcavator 36-39 MT (ICLE):06.539)	
> 30	K., (bicavator 50-59 MT (0C-4030, 59)	
> .83	IC_Excavator 5-9 MT (IC-EX55.5)	
> 30	C_Dxxxvator 80.49 MT (0C-8300.49)	
> .00	IC_P(dup 1/2 Ton (IIC-PU1.20C)	
> 30	ic_Pidup 3/+1 Ton (ic-PU3.4)	
> .00	1. SN (IC SNO)	
> 30	IC_Welder 200-250 Amp D (VC-WD250)	
> .00	IC_Welder 300-350 Amp D (IXC-WD350)	
> 30	(C_,)Velder 400-450 Ano D (XC-WD450)	
> .00	IC_Welder 500-550 Amp D (IC-WD550)	
> 30	IC_Welder 700-800 Amp D (IXC-IND800)	
> 04	-Cans (25)	
> Ca	lamps (33)	
> Co	ompressors (20)	
> 01	ranes (15)	
> 00	02875 (11)	
> Ex	cavators/Compactors (10)	
> Ge	enerators (22)	
> Gri	raders (16)	
> He	eaters (71)	
> Hy	yére (27)	
> Ug	ght Towers (21)	
> Of	ffce Equipment (30)	
> Pd	olers (14)	
> Pp	peline Misc. (37)	
	unos (24)	

7. The Cost Classification field will duplicate the classification chosen in the Billing Classification field. However, this can be changed by clicking on the ellipses icon in the Cost Classification field and changing it as required.

8. Click the **Details** tab. This page is used to capture custom field values. Populate any custom fields per your organization's requirements

# 1.11.3 CREATE NEW MATERIAL RESOURCE

#### CREATE A NEW MATERIAL RESOURCE

1. To begin creating new material, go to Data Library > Resources > Material.

InEight Billings (Billings	Internal)
«	
🟦 Data Library	^
✓ ♣ Resources	
Personnel	
。色 Equipment	
Material	

2. The Material Resources tab appears. click the Add Row icon on the ribbon bar.

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Actions	Print 5	rve						Window
vial Resources 0								
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D.	۰		•	•	•	•	•	
L S Poing	Stod Poing		Aberta	Material	Material 1-1	Active	ServCAMS ULC	

3. The Material window opens. Enter the material Name and Code.

ieneral	Details	Site	Project		
1.11	Name: Code:				
Source:					
Description	on: ssification:				
	sification:				***
Company Region:					
Status:			Active		
Notes:					
					A.
					×
Created: Modified:					
moullieu.					

4. Click the drop-down arrow on the field labeled Source. This field lets you label a piece of material using one of the user-defined Material Types.

Source:		-
Description:	Material	
Biling Classification:		
Cost Classification:		
Company:		
Region:		
Status:		
	×	

5. Click the ellipses (three dots) icon in the Billing Classification field and the Cost Classification field. A Classification window appears. Select the material's classification by double clicking on it.

NOTE You can use the Search feature at the top of the pop-up to search for the classification using either the name or the code.

Particula Classification         Image: Section Sectio		
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> Meterial 1/hu0	Q. free	
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6. Click the **Details** tab. This section is used to capture custom field values. Populate any custom fields per your organization's requirements.

7. Select **Apply** or **OK** at the bottom of the page to save your changes.

#### 1.11.4 CREATE A LOCATION

Locations are used to help in tracking of labor and equipment when they're not assigned to a project.

#### **CREATE A LOCATION**

1. To create a location, go to Data Library > Location.

«	
🟦 Data Library ^	
> 🕰 Resources	
Classifications	
Companies	
Cost Codes	
🔇 Regions	
[]뷰] Divisions	
O Locations	
Certifications	
Certification Types	
Reproject Administration	

2. The Locations tab appears. Click Add Row in the ribbon bar.

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Resetted 1 -			
Laneta t			

3. Enter the location description in the Name field and the location code in the Code field.

Cocation		o x
General		
Name: Code:	1	
Status:	Active	Ŧ
Created: Modified:		
	OK Cancel	Apply

4. Click **Apply** or **OK** at the bottom of the page to save your changes.

### 1.11.5 CREATE A NEW DIVISION

## CREATE A NEW DIVISION

1. To create a new division, go to Data Library > **Division**.



2. The Divisions tab appears. Click Add Row in the ribbon bar or press the Insert key on the keyboard.

			$\blacksquare$ $\times$
Row Delete Refresh			Layout Close
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visions O			
g a column header here to group by that column			
Name	Code	Status	
-O:			
Structural Fabrication	30	Active	
Pipe Fabrication	31	Active	
Module Assembly	32	Active	
Field Construction	35	Active	
Pipelne	34	Active	
Small Projects	33	Active	
Estimating	12	Active	
Headquarters	10	Active	
EM Equipment	20	Active	
Field Construction (Multiple jobs)	36	Active	

3. The Division window appears. Fill in the Name and the Code fields. Both are mandatory.

NOTE	Divisions must be unique within the database
🕅 Divis	ion

General [	Detail			
	Name: Code:			
Status:		Active		-
Notes:				
				A
				v
Created:				
Modified:				
		ОК	Cancel	Apply

4. The Status field will automatically default to *Active*. Enter any notes pertinent to the division in the Notes section.

5. Click the **Details** tab. This section is used to capture custom field values. Populate any custom fields per your organization's requirements.

6. Select **Apply** or **OK**, located at the bottom of the page to save changes.

**NOTE** Clicking Apply saves the changes and opens a new setup window, allowing you to quickly make another entry. Clicking OK will save the changes and close the setup window.

To view the Divisions tab and all divisions that have been set up, refer back to the steps above, where you opened the Division tab.

NOTE Any ribbon menu, where there is a Send To function, lets you send the contents of the active tab to Excel.

The available columns on the Divisions tab are:

- Name
- Code
- Status
- **NOTE** If there is a column header that is not currently in view when the page is open and you would like to see it, right click any column header, and select Column Chooser.

# 1.11.6 CREATE NEW COMPANY (CLIENT OR SUPPLIER)

Project related vendors are integrated from the Assigned Vendors in Platform. If additional companies need to be added that have not been automatically created from the Assigned Vendors in Platform, a new company (client, supplier or vendor) can be created with the following steps.

#### CREATE NEW COMPANY (CLIENT OR SUPPLIER)

1. Go to Data Library > **Company**.

«
Data Library ^
> ≝0 Resources
> 📩 Classifications
Companies
Cost Codes
🔇 Regions
Divisions
O Locations
E Certifications
Certification Types
🛠 Project Administration 🗸

2. The Companies tab appears. Click **Add Row** on the ribbon bar or press the Insert key.

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Auffah Impecter Service (200) Inc.	1953	Supplier	4,2+4	
Apex Statebullan Sec.	10027	Lapler	Active	
Pelalars (invaria).	18731	Suple	Adve	
Abarts Ppa Support & Pabrication The	100.00	Supplier	Activa .	
Deals of Teneng Arreading LNE	36577	Supplier	4.0+4	
Impective Testing Inc.	10152	Taple	Adve	
Teres Heduter Serves UN	102%	Saple	Adve	
WEL Steel Supplex	100.00	Supplier	Active	
TOPED Industry/Lol.	1076	Supplier	4.0+4	
Dire tac & Dean a Division of Dire Ittache Disposal	17.0%	Supplier	40.00	
Cross Country Physikes Supply Canada	1040	Supplier	4.0-4	
Ranad Phristic Inc.	1014	Supplier	Active	
Apon Secretaria Canatracter Sannyara U.A.	19675	Supplier	A(2)+8	
Every Scheduler	10:25	Supplier	4/5+4	
Industrial Scaffold Services (P	10075	Laple	Adve	
Narvedd Diress (1994) UM	1029	Supplier	Active	
Aptech Technol Services	10128	Supplier	Activa	
Out-Redc Services Inc.	10014	Supplier	4/2+4	
Decarlo Depend 141.	1000	Laple	Autora .	
Tethad Insulation Services	19636	Saster	4:0-e	
Twise Probably	10.000	Supplier	Activa	

3. Enter the company name in the Name field. Enter the applicable code in the Code field. Click the drop-down box in the **Type of Relationship** field. Select whether the company is a Client, Supplier or other description previously specified by your system administrator.

📗 Compa	any:				0	×
General	Address	Contact	Phone	Detail		
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Type o Status:	f Relationshi	_	tive			•
Notes:						
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			ок	Cancel		Apply

Type of Relationship:		*
Status:	Clent	
	Suppler	
Notes:	Owner	
	DSP	
	Subcontractor	
InEight Inc.   Release 25.5		
	×	

Page 53 of 155

4. The Status field will automatically default to *Active*. Enter any notes pertinent to the company in the Notes section and then click the Address tab. Enter the necessary information for the primary address as listed. You can use the arrow keys or Tab key on your keyboard to move between fields.

📗 Compa	эпу:				D	×
General	Address	Contact	Phone	Detail		
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Address T Address 1:						
Address 2						
City: Province:						
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			OK	Cancel	Appl	у

	Type: City:	~
Address Type: Address 1:		
<sup>2</sup> age 54 of 155		
City:		
Province:		
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InEight Inc. | Release 25.5

5. Click the **Details** tab. This section is used to capture custom field values. Populate any custom fields per your organization's requirements.

6. Click the **Append** icon at the bottom, left of the page to add another address. If you need to remove an address card, select the one to be removed, then click the **Delete** icon.

7. Continue the same steps to enter details in the Contact, Phone and Details tabs. When ready, click **Apply** or **OK** at the bottom of the page to save your changes.

# **1.12 PROJECT MANAGEMENT**

# **1.13 RATE TABLES**

## 1.13.1 CREATING A NEW RATE TABLE

A rate table consists of personnel, equipment, material, and line item rates for premiums and allowances, as well as other rate exceptions. A rate table must be created and associated with a project prior to any billable work being LEM'd or invoiced for that project. A single rate table can be used by one or multiple projects and you can add a rate table to a specific project WBS item.

#### 1. Go to Project Administration > Rate Tables.



2. The Rate Tables tab opens. You can select any rate table to modify, or you can create a new rate table by clicking the **Add Row** icon on the ribbon bar.

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3. In the resulting new rate table tab, enter the name for the new rate table in the Name field. In the Code field enter the new code. This can be a numeric value or an abbreviation that the rate table goes by.

4. Select the appropriate region the rate table belongs to.

Rate Tab	ien Ref	te Table O																		
		to the second	Salarial Role																	
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5. The Status field automatically defaults to *Active*. Enter any notes pertinent to the rate table in the Notes section and then click **Apply** to create the rate table

#### 1.13.1.1 COLUMN DISPLAY OPTIONS

The Column Display Options button lets you show or hide columns by going to Rate Tables > Selecting a rates table, and then selecting or deselecting each shift column from the **Column Display Options** button from the ribbon menu. By default, at least one item needs to be selected. If all items are deselected, the drop-down will default to show day shift for Personnel, or Type 1 for Equipment.

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Add Row	Delete Row(s)	Refresh	Paste Special	← Undo	Send To	Mass Edit		mn Display otions 👻		
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Edity	our parso	nnel rates	here. By default, the	most currer	t rates for	each classif	$\checkmark$	Show Nig	ht Shift	
			e in effect on differe					Show Oth	ver Shift	

#### 1.13.1.2 COMPANY AND SOURCE COLUMNS

The Company and Source columns give you flexibility when working with different companies, roles or resource types. These columns are listed in the personnel, equipment, material, and line items tabs of the rate table and allow you to set different rates based on what role is performing the work or where the resource comes from. For example, if rates differ between companies for the same role, where a subcontractor charges \$30/ST hour, and an employee charges \$25/ST hour for day shift, and \$27/ST hour for night shift, you can use the Company and Source columns in the rate table to define those rates without having to create separate rate tables.

Rate Table	ns Rate: La	bor12 0													÷
General	Personnel Rates	Eguipment Rat	es Material R	ates Lir	ine item Rates										
To view	r personnel rates h the rates that were tes effective as of:	in effect on dif	ferent dates, chi	t rates for inge the ef	each classificat ffective date.	tion are shown.									
													Double Time		
Cla	assification		F	esource		Co	mpany	Personnel Sou	ce	Ŧ	Eff. Date	Other Shift	Day Shift	Night Shift	08
Τ.						-	Example Architect.	= Subcontra	ttor	-					
Record (	0 of 0 ◀					_									+
												OK	Cancel	Apply	

#### 1.13.1.3 PERSONNEL RATES

In the same new rate table tab as above, click the **Personnel Rates** tab to start entering personnel rate information.

			Straight Teve		Overtime		Couble Time		Double Time 1	Q.	Travel Time		LOA		Day	
Cassification	Resource	Eff. Date	Day Shift	NPLPA	Day Shift	NPLEM	Day Shift	Nyte Svit	Day Shift	NUH SHR	Day Shift	NPLINE	Day Shift	Nght5	Day Shift	NPLIDA
•	•															

By default, the most current rates for each classification (and optionally, named resource) are shown. To view the rates that were in effect on a different date, change the effective date in the Shown rates effective as of drop-down above the rates grid.

To add a new personnel rate record, click the Add Row icon located in the ribbon bar. If you wish to delete a record, select it by clicking it once, and then click the Delete Row(s) icon located in the ribbon bar. Click the drop-down list or the ellipses (three dots) icon under the Classification column and select the classification being assigned to the rate record.

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	<ul> <li>RC_Lepenter 3 (RC 073)</li> </ul>
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• •	<ul> <li>RC_bbare - Janie (C-600)</li> </ul>
	<ul> <li>JE_idearw - Serier (EE103)</li> </ul>
·	<ul> <li>RC_Supervisedent (RC-SIP)</li> </ul>
	> XC_Unidar - Divenue (IC-0009)
	> XC_IN88e - CN8 (IC-INDCH8)
	> Carpentar (PC-07)
	Red Management (FO-MG)
	> Pold Supervision (PD-97)
	Home Office, Administration (HO-ADME)
	> Hore Office, Editedan (HO-6576)
	<ul> <li>Here Office, Elecutive (HO-DEC)</li> </ul>
	> Here Office, Nanagement (HO H2H)
	Home Office, Operations (HO-OPRG)
	<ul> <li>Here Office, Project Centrals (HO-PRXC)</li> </ul>
	Home Office, Projects (HO PRO3)
	> bran titoriar (*0-21)
	> Laboure (FC-U)
	<ul> <li>Milwreite (*0-Mil)</li> </ul>
	> Operator (FD-OP)
	> 2politice (70.07)
	> Q400 (PD Q0
	> Sefety (0:07)
	<ul> <li>Workbaue FD-IIM</li> </ul>

					Straight Time		Overtime	
	Classification	Resource		Eff. Date	Day Shift	Night Shift	Day Shift	Nig
r	1 <b>0</b> :	* <b>0</b> ¢						
1			*	Jan-29-2023				
		Name	Code	Classification	Classification	Region	Status	
		Aaron Brewst	176689	.KC_Labourer	KC-LBSR	Alberta	Active	
		Aaron Frick A	103391	.KC_Welder	KC-WDCWB	Alberta	Active	
		Aaron Pearso	135800	.KC_Labourer	KC-LBSR	Alberta	Active	
		Aasen Michael	30998	Pipefitter - Jo	PF-JM	Alberta	Active	
		Ababio Elvis	31038	Pipefitter - Jo	PF-JM	Alberta	Active	
		Abasolo Jeger	2875	Pipefitter - Jo	PF-JM	Alberta	Inactive	
		Abbott Sara	3584	Pipefitter - Jo	PF-JM	Alberta	Inactive	Ŧ
		×						

NOTE Optionally, Billings supports rates for individual resources by classification. For example, John Smith working as a skilled laborer can be billed out at rates different than the standard skilled laborer rates. If you choose to enter a rate for an individual in the classification selected, click the drop-down list under the Resource column, and then select the individual assigned to the rate record.

Select the Effective Date of the rate record (that is, when does this rate take effect) and enter in the rates to be used for the different earnings class by shift (i.e., Straight Time, Overtime, Double Time, Double Time and a Half, Travel Time, LOA, and Day). Repeat these steps to add another classification to this rate table.

#### 1.13.1.4 EQUIPMENT RATES

To start entering equipment rate information for the rate table you have open, click on the **Equipment Rates** tab.

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		n						Eff. Date	Each	Hours	Days	Weeks
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7	Tank - 640							Aug-01-2023 Aug-01-2023	Ť	100.00	50.00	300.0
Rec	ord 1 of 2	4										

By default, the most current rates for each classification (and optionally, named resource) are shown. To view the rates that were in effect on a different date, change the effective date in the Shown rates effective as of drop-down above the rates grid.

To add a new equipment rate record, click the **Add Row** icon located in the ribbon bar. If you wish to delete a record, select it by clicking it once, and then click the **Delete Row(s)** icon located in the ribbon bar.

Click the drop-down list or the ellipses icon under the Classification column and select the classification being assigned to the rate record.

NOTE Optionally, Billings supports rates for individual resources by classification. For example, JD Backhoe operating as an excavator can be billed out at rates different than the standard backhoe rates. If you choose to enter a rate for an individual piece of equipment in the selected classification, click the drop-down list under the Resource column, and then select the individual piece of equipment assigned to the rate record.

Select the Effective Date of the rate record (that is, when does this rate take effect) and enter in the rates to be used for the different earnings class by shift (i.e., Hours, Days, Weeks, Months and a Standby and Each). Repeat these steps to add another classification to this rate table.

#### 1.13.1.5 MATERIAL RATES

To start entering material rate information, click on the **Material Rates** tab under the Rate table tab you are in.

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To v	your mater view the rate w rates effe	es that were	ere. By default, the m e in effect on differe : Oct-31-2024	ost current rate: nt dates, change	s for each e the effe	h classificati ective date.	on are shown	/n.							
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By default, the most current rates for each classification (and optionally, named resource) are shown. To view the rates that were in effect on a different date, change the effective date in the Shown rates effective as of drop-down above the rates grid.

To add a new Material rate record, click the Add Row icon located in the ribbon bar. If you wish to delete a record, elect it by clicking it once, and then click the Delete Row(s) icon located in the ribbon bar. Click the drop-down list or the ellipses icon under the Classification column and select the classification being assigned to the rate record.

Click the drop-down list or the ellipses icon under the Classification column and select the classification being assigned to the rate record.

NOTE Optionally, Billings supports rates for individual items by classification. If you choose to enter a rate for an individual material in the classification selected, click the drop-down list under the Resource column, and then select the individual material being assigned to the rate record.

Select the Effective Date of the rate record (that is, when does this rate take effect) and enter in the rates to be used for the earnings class (i.e., Each). Repeat these steps to add another classification to this rate table.

#### 1.13.1.6 LINE ITEM RATES

To start entering Line Item rate information, click on the Line Item Rates tab under the Rate table tab you are in. Continue adding the necessary resource type, classifications, and line item types for the project and the corresponding rates.

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Ŧ	Resource Type	Classification	Assigned To	Line Item Type	Eff. Date	Each
	Resource Type	Classification	Assigned To	Line Item Type	Eff. Date	Each
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÷	Personnel	Iron Worker - Journeyman (IW-3M)		Allowance - LOA	Jan-01-2023	150.00
	Personnel	Iron Worker - Apprentice T (IW-AT)		Allowance - LOA	Jan-01-2023	250.00
	Personnel	Internet of the second se		Premium - Confined Space	Jan-01-2024	1.50
	Personnel			Premium - Fire Watch	Jan-01-2024	.50
	Personnel				Jan-01-2024	.30
	Personnel			Allowance - Travel Daily	Jan-01-2024	100.00
	Personnel			Allowance - Travel_Shift	Jan-01-2024	500.00

By default, the most current rates for each classification (and optionally, named resource) are shown. To view the rates that were in effect on a different date, change the effective date in the Shown rates effective as of drop-down above the rates grid.

Edit your line items rates here.

To add a new Line Item (e.g. Premium or Allowance) rate record, click the **Add Row** icon located in the ribbon bar. If you wish to delete a record, select it by clicking it once, and then click the **Delete Row(s)** icon located in the ribbon bar.

Select the Resource Type in the first column (i.e., Personnel, Equipment, or Material) to indicate which entity type the rate record will apply to.

Click the drop-down list or the ellipses icon under the Classification column and select the type being assigned to the rate record. The list here will be determined by the Resource Type specified for the row.

# NOTE Optionally, Billings supports rates for individual resources by classification. If you choose to enter a rate for an individual resource in the classification selected, click the drop-down list under the Resource column, and then select the individual resource being assigned to the rate record.

Select the Line Item Type in the next column (note that this list will be determined by your system administrator during application configuration as it is configurable) to indicate which entity type the rate record will apply to. Select the Effective Date of the rate record (that is, when does this rate take effect) and enter in the rate to be used for the earnings class (i.e., Each). Repeat these steps to add another row to this rate table.

# 1.13.2 COPYING A RATE TABLE

In some cases, you will need to create a new rate table that's very similar to an existing one. Instead of performing the entire process of creating a new rate table, the best process would be to copy a rate table.

#### COPY A RATE TABLE

#### 1. Go to Project Administration > Rate Tables.



2. The Rate Tables tab appears. Select the rate table to be copied by clicking on it once with the mouse, then on the ribbon bar, click **Copy**.

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3. Now click **Paste** or **Paste Special** to make a copy of the rate table.

Paste creates an exact copy of the source rate table, while Special Paste lets you control what and how the rate table is copied, including adjusting effective dates, changing rate table name, and code, and adjusting other aspects of the rate table that are applicable for the new rate table. If Paste Special is selected, the Paste Special window will appear

4. Under section 1, change the name of the rate table and type in an appropriate Code for the new rate table.



5. Under section 2, determine precisely what portion of the rate table you want to be copied (either Personnel, Equipment, Material, Line Items, or all four sets of rates).

6. Section 3 gives the choice of copying the rates exactly as they exist in the original rate table or to modify the effective dates. If the effective date requires modification, choose the date the rates will be effective from.

7. Section 4 determines the next steps, either to return you to the rate table list or open the new rate table.

8. After the modifications have been made, click **OK** along the bottom of the rate table screen to save.

If **Open the new rate table** is selected, the new rate table will open allowing you to make any additional modifications.

10. After the modifications have been made, click **OK** at the bottom of the rate table page to save.

# **1.14 MANUAL RATE IMPORTS**

The Manual Rate Import wizard will guide you through importing labor, equipment, material or line item rates from a spreadsheet.

NOTE To import multiple rate types, you must run the import wizard for each rate type

A custom template can be used to map and import data into the Billings rate tables. Template spreadsheets are provided when accessing the wizard, but any Microsoft Excel spreadsheet can be used and mapped through the wizard process. After the templates have been downloaded and ready to import, click **next** to continue.



#### IMPORT RATE TABLE FILE AND CONFIGURE SETTINGS

1. In the Rate table File section, select a file by clicking the ellipses, select the file, and then click **open**.



2. Columns from the imported file appear and can be updated in the Billings data selection screen. After reviewing the imported data, click **Next**.

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	row of data	1\Desktop\														
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3. The Column Mapping section lets you specify the column mappings. Fields with an asterisk are required.

Click the matching line# drop-down (arrow/list) next to each resource to map the columns, and then click **Next**.

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4. Review and make any corrections in the Rate Table overview before you continue.

Only the records without errors are imported. To investigate errors, click the Log drop-down list. Click the **Back**to fix any errors or **Next** to continue.

Line #	Error Msg	Log	Classification Name	Classification Code
1	A matching company was not found	<u>A</u> -	Classification Name	Classification Code
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5. Select **Create New Rate** or **Update Existing Rate Table** to specify how to import the data, and then click **Next** start your import.

When creating a new rate table, label it in the Rate Table Name field. The Rate Table name, Rate Table Code and Region fields are required to proceed.

Create New Rate Ta     Select Rate Table	ale		Update Existing Ra	ate Table		
Rate Table Name			Rate Table Code			
Default Effective Date	Apr-17-2025					
Region						

5. Click **Next** and then **Finish** to save your import.

# 1.14.1 IMPORTING A RATE TABLE

Billings lets you create and maintain rate tables externally in a spreadsheet format and import the rates into an existing rate table or as a new rate table. There are two forms of rate table imports.

You can use the Rate Import template through Processes > Imports > Rate Table Import or the Legacy Labor Rate Import as shown below.

#### LEGACY LABOR RATE IMPORTS

NOTE Currently, Only Personnel rate import is supported

1. To Start the import process, select Project Administration > Rate Tables and select **Import Rates** from the ribbon bar.

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2. The Rate Import wizard appears.

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3. Select the spreadsheet file to import by using the ellipses (three dots) icon to launch the file picker and select the path and the rate table Excel file.

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4. The data preview pane will populate with the contents of the source spreadsheet.

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5. Specify whether the rates are stored horizontally or vertically in the spreadsheet and indicate how many of the top rows to ignore (for example, header row which may contain column names). Click **Next** to proceed.

Rate Table Type:	Single rate per row of data	Multiple rates per row of data
Ignore the first	1 🗘 row(s)	

6. The second page of the wizard lets you map columns or rows in the spreadsheet to resource classification, resource identifier (if required), and units of measure. The mappings are different depending on whether the rates spreadsheet is horizontal, or vertical.

Single rates per row of data layout:

specify column mapping below:	Deta previev			
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Multiple rates per row of data layout:
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7. After you have mapped the columns, click **Next** to go to the third page of the wizard which will preview the imported rate table in Billings format.

8. The last column in the import preview page specifies errors that have been found with each line of the import file. Only lines which are error-free will be imported into Billings. Review and correct any errors reported and click **Next** to proceed.

9. The final page of the wizard lets you control whether the rate import will be imported into a new rate table or whether the import will update an existing rate table.

10. Create a Rate Table Name or choose an existing rate table from the Rate Table Name drop down list. If the Update Existing Rate Table option is selected. Indicate the Effective Date for the rates. After you are done, click **Import** to import the rates.

# 1.14.2 UTILIZING MASS EDIT WITH A RATE TABLE

The Mass Edit feature is available to users to simultaneously adjust multiple rates within a rate table. This function frees you from needing to adjust each rate individually. Although this functionality is beneficial, you must be cautious when applying it, as multiple rate records are affected simultaneously. The mass edit feature can also be used to clean up a rate table after it has been updated using the Rate Import Wizard (for example, to remove any new rates that did not actually change from prior effective date).

### MASS EDIT RATE TABLES

1. Go to Project Administration > Rate Tables.



2. Select the required rate table from the list by double-clicking on it.

	ag a column header here to group by that column		
	Name	Cade	Status
r	0	0	•
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٠	(Internel) thep/hard fixedity - COST		
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	180004, Encare TOUER, 13-34-79-17 W6-PADS2T - PARIDUL	180004-33-PA/RIOL	Athre
	B071228, Encana BC Rates - B11,2NG	80712298C-811.2NG	Active
	180006, Encane SCUH - PAIRIOLL	180006-P#/ROL	Inche

3. The rate table opens in a new tab, with the General tab active below it.

URI         Information           pp:         Information           pp:         Information           pp:         Information	URI         Imma         Imma           pr.         Imma         Imma         Imma           mr.         Imma         Imma         Imma         Imma           mr.         Imma         Imma         Imma         Imma         Imma	URI         Imma         Imma <thi< th=""><th>URI         Information           pp:         Information           pp:         Information           pp:         Information</th><th>53 Name I</th><th>Internal Shop/Yard Facility</th><th>0000</th><th></th><th></th><th></th></thi<>	URI         Information           pp:         Information           pp:         Information           pp:         Information	53 Name I	Internal Shop/Yard Facility	0000			
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Rate Tables Rate Table O
General Personnel Rates Eguipment Rates Material Rates

4.Review the Personnel, Equipment and Material Rates tabs to confirm your selection is correct for making mass edits. From the ribbon bar, select **Mass Edit**.

े Mass Edit Rates		0
Select Mass Update Type:     Updates Rates for the current Effectiv     Erreate new Rates for this Effective Da		
Remove Rate lines (Classifications) for	the current Effective Date e Date which have not changed since last Effective Date	
. Select Scope: Personnel Rates Equipment Rates Material Rates Include blank values		
Include rate codes Specify Adjustment Details:		
Blank out Rates     Keep Current Rates     Alter Rates by Amount:     Alter Rates by Percentage:	0     -       0     -       0     -       %	
		OK Cancel

5. In section 1, select the type of mass update:

- Update Rates for the current Effective Date.
- Create new Rates for this Effective Date.
- Remove Rate lines (Classifications) for the current Effective Date.
- Remove Rates for the current Effective Date which have not changed since last Effective Date.

6. In section 2, determine precisely what scope of the rate table will be edited (either Personnel, Equipment, Material, Line Items, or all four sets of rates).

7. In section 3, specify the adjustment details (gives the choice of blanking out the rates, keeping the current rates, or altering the rates by either an amount or percentage).

8. After the modifications have been made, click **OK** to adjust the rate table based on the parameters you specified. The adjusted rate table will automatically refresh with the effective date and rates altered accordingly.

9. When complete, click the **Apply** button or to save the changes and exit the window, click **OK** located at the bottom of the page.

# 1.14.3 CONFIGURING A PROJECT

When a project has been created in Platform and flagged as being Time and Materials, it is automatically synced into Billings.

To configure the project for billings purposes, double-click the existing project from the list and go through the tabs listed below.

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IMPORT TEST     Active     Default     Default       TEST CBS     Active     Default     Default       DEMO-UR     Active     Default     Default
TEST CBS     Active     Default     Default       DEMO-UR     Active     Default     Default
DEMO-UR Active Default Default
Demo Active Default Default
1234 Active Demo Supplier 2 Default
DEMO-BILL Active Default Default

You can also manually create a new project by clicking the Add Row icon on the ribbon bar.

NOTE A project created manually in Billings will not be automatically created in Platform.

### 1.14.3.1 CONFIGURE TAB

To select bill rates, click the Bill Rate Table drop-down list, and then select the rate table that contains the bill rates that apply to the project.

### Billings User Guide

Equipment	Crew	Material	Timesheet Options	Work Order	Attachments	Mobile Security	Mobile Configura	tion
General	Configu	re	Line Item Markups	Cost Code	Details/Notes	Budget	Progres	s
lill Rates	Colort the default rate	e to be used in th	e invoicing of this project (and chi	ld WPS items)				
		is to be used in th	envolcing of this project (and chi	a woo tenay.				
	Bill Rate Table:						<b>~</b>	
	Allow Override T	ïmesheet Bill Rat	te					
Cost Rates								
	Select the default rate	is to be used in th	e costing of this project (and child	WBS items).				
	Cost Rate Table:						Ŧ	
ayroll Rates								
	Select the default rate	is to be used in th	e payroll of this project (and child	WBS items).				
	Payroll Rate Table:						-	
Vork Flow								
	Set whether or not ti	mesheets against t	this project (and child WBS items) r	need to be approved prior	to being invoiced.			
	Approval require	d						
Budgeting								
	Set the level of detail	of budgeting that	t will be used on this project. Once	progress or budgets have	been entered, you can no lo	nger edit these values.		
	Budget By:						-	
	Budget at Level:	÷						
Custom Details								
	Dim 1:							
	Dim 2:							
	Activity Code:							
	indirity boat							
						ОК	Cancel	Apply

Equipment	Crew	Material	Timesheet Options	Work Order	Attachments	Mobile Security	Mo	bile Configuration
General	Config	jure	Line Item Markups	Cost Code	Details/Notes	Budget		Progress
CII Datas								
Bill Rates	Select the default ra	ates to be used in th	e invoicing of this project (and ch	ild WBS items).				
	Bill Rate Table:						~	
	Allow Override	Times [Internal]	EQUIPMENT - COST					
		[Internal]	Non-project Specific - COST					
Cost Rates	Select the default ra		Shop/Yard Facility - COST					
	Select the default ha	[Internal]	Shop/Yard Facility - PAYROLL					
	Cost Rate Table:		incana Pipestone Liquids Hub - B incana Pipestone Liquids Hub - P					
Payroll Rates			IEG - PAYROLL (Inactive)	AIROLL				
	Select the default ra	And And A	IEG Energy - BILLING (Inactive)					
	Payroll Rate Table	180004, E	ncana TOWER 13-34-79-17 W6	PADSIT - PAYROLL				
			ncana, Tower 6-16-080-17 W6	10 Well Pad - PAYROLL (In	active)			
Work Flow	Set whether or not		incana SCLH - BILLING (Inactive)	)				
	Set whether or not	180006, E	ncana SCLH - PAYROLL (Inactive	=)				
	Approval requi	rea	3 - PAYROLL (Inactive)					
Budgeting			3 - PAYROLL (Inactive)					
budgeung	Set the level of deta		3 - PAYROLL (Inactive)					
		· · · · ·						-
Eight Inc.	Release :	25.5					*	Page 77 of 1
	Budget at Level:	¢						
Custom Details								
	Dim 1:							

Activity Code:

Page 78 of 155

180010-33 - PAYROLL (Inactive)

×

Select the applicable job Cost Rate Table from the drop-down menu, if desired, and finally select the applicable Payroll Rate Table from the drop-down menu, again, if desired or required.

Equipment	Crew	Material	Timesheet Options	Work Order	Attachments	Mobile Security	Mobile Co	nfiguration
General	Configure		Line Item Markups	Cost Code	Details/Notes	Budget	F	rogress
Bill Rates				10000 1				
	Select the default rates to	o be used in th	e invoicing of this project (and chil	d WBS items).				
	Bill Rate Table:						Ŧ	
	Allow Override Time	esheet Bill Rai	te					
Cost Rates								
	Select the default rates to	be used in th	e costing of this project (and child	WBS items).				
	Cost Rate Table:							
	Cost Rate Table:	[Internal]	EQUIPMENT - COST				×	
Payroll Rates		Itotoroall	Non-project Specific - COST					
	Select the default rates to	50	Shop/Yard Facility - COST					
	Payroll Rate Table:	[Internal]	Shop/Yard Facility - PAYROLL					
Work Flow		180002, E	ncana Pipestone Liquids Hub - BI	LLING				
	Set whether or not times	STI4	ncana Pipestone Liquids Hub - PA	YROLL				
			IEG - PAYROLL (Inactive)					
	Approval required		1EG Energy - BILLING (Inactive) Encana TOWER 13-34-79-17 W6 F					
Budgeting		180005, F	incana, Tower 6-16-080-17 W6 1		(nactive)			
	Set the level of detail of t	bu	incana SCLH - BILLING (Inactive)					
	Budget By:	180006, E	ncana SCLH - PAYROLL (Inactive	)				
	Budget at Level:	180008-3	3 - PAYROLL (Inactive)					
Custom Details			3 - PAYROLL (Inactive)					
Custom Details			3 - PAYROLL (Inactive)				*	
	Dim 1:	×						
	Dim 2:							
	Activity Code:							
						OK	Cancel	Арр
Payroll Rate Tabl	e:					v		
	[Internal] EQU	JIPMENT - C	OST					
Set whether or no	[Internal] Non	-project Spe	cific - COST					
Set whether or no	[Internal] Sho	p/Yard Facili	ty - COST					
Approval requ	uired [Internal] Sho	p/Yard Facili	ty - PAYROLL					
	180002, Encar	na Pipestone	e Liquids Hub - BILLING					
	180002, Encar	na Pipestone	e Liquids Hub - PAYROLL					
Set the level of de	180003, MEG	- PAYROLL (	Inactive)					
Budget By:	180003, MEG	Energy - BIL	LING (Inactive)					
Budget at Level:	180004, Encar	na TOWER 1	3-34-79-17 W6 PADSIT - PAYR	OLL				
budget at Level:		na, Tower 6	-16-080-17 W6 10 Well Pad - P/	AYROLL (Inactive)				
	180006, Encar		UINC (In a time)					
Dim 1:		na SCLH - DI	LLING (Inactive)					
Din 1.	180006, Encar		AYROLL (Inactive)					
Dim 2:	180006, Encar 180008-33 - P	na SCLH - P/	AYROLL (Inactive)					

If timesheet approvals are required for the project, check the **Approval required** check box. The main result of this check box being set is that unapproved time sheets are not picked up for the LEM or Invoicing process, or other exports which have time sheet approvals enabled.

NOTE Work flow can also be handled at the processing stage of the time sheet cycle. If you are generating a LEM process, the process can be set to the ignore approval work flow, depending on your organizational work flow requirements.

Select the level of detail you want the budgeting information to use if you wish to track project budgets in Billings. Most projects require more than one level of detail in the project structure. You can track budgets and progress at the Project/ WBS level or at the WBS/Cost Code level, depending on your budgeting requirements.

NOTE Project Level 1 means the budget is being created at the root project level. If set to Project Level 2, the budget is being applied to WBS Level 1, second node of the project tree.

Budgeting	Set the level of detail of	budgeting that will be used on this project. Once progress or budgets have been entered, you can no longer edit these values.	
	Budget By:	Project	-
	Budget at Level:	2 ‡	

## 1.14.3.2 LINE-ITEM MARKUPS TAB

In the Default Markup Values section, enter markup percentage values for your charge out rates for Line Items that are entered on time sheets.

### 1.14 Manual Rate Imports

Genera		Configure		Line It	em Markups	Cost Code	Details/Notes	Budg	get	Progress
fault Markı	ın Values —									
		ill use the fr	lowing markup	percenta	aes when calculating LF	Mamounts Exceptions t	o these default percentag	as are specified in H	ha tahla hali	214
	off aneonee as n		sioning manap	percento	geo mien colocidong et		o alebe deladit percentag	eo are opeanea ir a		
Persor	nnel line items ar	e charged a	t cost plus		%					
Equipr	ment line items a	e charged a	at cost plus		%					
Materi	ial line items are	charged at	cost plus		%					
Line it	ems are charged	at cost plus	S		%					
Other	line items are ch	arged at co	st plus		%					
Invoice	e markups as sep	erate invoid	e items							
eptions										
The defaul	lt percentages at	ove may no	ot be accurate	for some o	of the resource type/lin	e item combinations. Spe	tify the exceptions here.			
ersonnel	Equipment	Material	Line Items	Other						
	-, ,					S	ource			
Line Ite	em Type	Subco	ontractor		Employee	DSP	Third Part	/	FAC	
		Subco	ontractor		Employee	DSP	Third Part	/	FAC	
	al	Subco	ontractor		Employee	DSP	Third Party	/	FAC	
Materia	al se	Subco	ontractor		Employee	DSP	Third Party	/	FAC	
Materia Expense	al se	Subco	ontractor		Employee	DSP	Third Part	/	FAC	
Materia Expens 3rd Par	al se rty	Subco	ontractor		Employee	DSP	Third Part	/	FAC	
<ul> <li>Materia</li> <li>Expense</li> <li>3rd Pare</li> <li>Other</li> <li>Consur</li> </ul>	al se rty	Subco	ontractor		Employee	DSP	Third Part	/	FAC	
<ul> <li>Materia</li> <li>Expense</li> <li>3rd Pare</li> <li>Other</li> <li>Consur</li> </ul>	al se rty mables ntractor	Subco	ontractor		Employee	DSP	Third Part	/	FAC	
<ul> <li>Materia</li> <li>Expens</li> <li>3rd Par</li> <li>Other</li> <li>Consur</li> <li>Subcor</li> </ul>	al se rty mables ntractor nent	Subco	ontractor		Employee	DSP	Third Part		FAC	
<ul> <li>Materia</li> <li>Expense</li> <li>3rd Pare</li> <li>Other</li> <li>Consure</li> <li>Subcore</li> <li>Equipment</li> </ul>	al se rty mables ntractor nent	Subco	ontractor		Employee	DSP	Third Part		FAC	
Materia Expens 3rd Par Other Consur Subcor Equipm Labour Fuel	al se rty mables ntractor nent	Subco	ontractor		Employee	DSP	Third Part		FAC	
Materia Expense 3rd Par Other Consur Subcor Equipm Labour Fuel Transp	al se mables ntractor nent	Subco	ontractor		Employee	DSP	Third Part		FAC	
Materia Expense 3rd Par Other Consur Subcor Equipm Labour Fuel Transp BURDE	al se mables ntractor nent	Subco	ontractor		Employee	DSP	Third Part		FAC	
<ul> <li>Materia</li> <li>Expense</li> <li>3rd Par</li> <li>Other</li> <li>Consur</li> <li>Subcore</li> <li>Equipmedia</li> <li>Laboure</li> <li>Fuel</li> <li>Transpe</li> <li>BURDE</li> <li>BURDE</li> </ul>	al se mables ntractor nent		ontractor		Employee	DSP	Third Part		FAC	
Materia Expens 3rd Par Other Consur Subcor Equipm Labour Fuel Transp BURDE BURDE BURDE	al se mables ntractor nent ort & Freight NS - CPP INS - EI		ontractor		Employee	DSP	Third Part		FAC	
<ul> <li>Materia</li> <li>Expense</li> <li>3rd Par</li> <li>Other</li> <li>Consur</li> <li>Subcore</li> <li>Equipmedia</li> <li>Laboure</li> <li>Fuel</li> <li>Transpe</li> <li>BURDE</li> <li>BURDE</li> <li>BURDE</li> </ul>	al se nty mables ntractor nent		ontractor		Employee	DSP	Third Part		FAC	

Default Markup Values		
Line Items on timesheets will use the following markup pe	ercentages when cal	culating LEM amounts. Exceptions to these default percentages are specified in the table below.
Personnel line items are charged at cost plus		%
Equipment line items are charged at cost plus		%
Material line items are charged at cost plus		%
Line items are charged at cost plus		%
Other line items are charged at cost plus		%
<ul> <li>Invoice markups as seperate invoice items</li> </ul>		

Select the Invoice markups as separate invoice items if you want the markups to show on their own invoice line, otherwise invoices will show fully marked-up amounts.

In the Exceptions section, enter any markup exceptions that apply to specific line-item types. These values are entered as percentages.

Pe	rsonnel	Equipment 1	Material	Line Items	Other				
							Sou	rce	
	Line Iter	n Type	Subco	ontractor		Employee	DSP	Third Party	FAC
<i>→</i>	Material								
	Expense	2							
	3rd Part								
	Other								
	Consum	ables							
	Subcont	ractor							
	Equipme	ent							
	Labour								
	Fuel								
	Transpo	rt & Freight							
	BURDEN	IS - CPP							
	BURDEN	IS - EI							
	BURDEN	IS - Small Tool All.							
	BURDEN	IS - Health							
	TEST								

# 1.14.3.3 COST CODE TAB

Click **Add Row**on the ribbon menu to add new cost codes to the project/WBS node selected. Billings only allows charging of time and resources to a project node if cost codes have been associated with the project or WBS node. If your project structure is complex, you would normally not attach any cost codes at the root node, as they would be defined at the lowest level of the project/WBS tree structure.

	Row(s) Actions	Refresh	Copy C Paste Paste Special Edit	Show Active Only Filter	↓ 2 Sort By Name ↓ 3 Sort By Code Sort	Direction: Asc												Close Window
<ul> <li>→</li> </ul>	_		e Q. Find					Equipment General		Crew Conf	Material		Timesheet Options Item Markups	Work Order Cost Code	Attachments Details/Notes	Mob	ile Security Budget	Mobile Configuration Progress
							-	Cost Code				F [	escription					
								<ada< td=""><td>Code New Cost</td><td>t Code&gt;</td><td>Add New Cost</td><td>st Code&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></ada<>	Code New Cost	t Code>	Add New Cost	st Code>						
								00 1005 1006			Billable Survey Dewatering							
								1015			Grade Line Locating							
								1025 ×			Hydrovac		•					

If you need to remove a cost code, select the line, then click **Delete Row(s)** from the ribbon menu.

Add as many cost codes to the node as needed to capture the required information during LEM data entry. If the Project/Cost Code custom fields have been set up, you can populate them by clicking on the small filter icon next to the cost code to open a list of the custom fields available.

### 1.14.3.4 DETAILS/NOTES TAB

This tab lets you enter project specific data into custom fields that have been set up by the administrator, along with general project notes.

Project AFE No. Client R [Compa	Allowance Taxab Location/LSD N. Ref. No.	Configure	Line Item Mar	kups	Cost	Code					
Travel A Project AFE No. Client R [Compa	Location/LSD Ref. No.	ole?			0000		Details/Not	es	Budget	Progr	ess
Project AFE No. Client R [Compa	Location/LSD Ref. No.	le?				Value					
AFE No. Client R [Compa	Ref. No.										
Client R [Compa	Ref. No.										
[Compa											
	Angeneral										
Client A	anyj Approval										
	Approval										
Tax Coo	de										
Tax Rat	te										
WBS No	otes										
Client Ir	nvoice Mapping										
Apply ti	ime bumping										
Time bu	ump ST daily thre	eshold									
	ump OT daily thre										
	ump DT daily thre										
	ump ST weekly th										
	ump stat holiday										
	lite scope to time										
	ump first day of v										
	e Work Done In										
	bill rate validatio										
	payroll rate valid										
Enable	cost rate validat	tion									

## 1.14.3.5 EQUIPMENT TAB

Select the equipment filtering option that you want to apply to the project.

- No Filter lets you to select any active piece of equipment, given the Region security filters.
- Filter by Site lets you to select only those pieces of equipment which have been associated with the site to which the project belongs to.
- Filter by Schedule lets you to select only those pieces of equipment for which the work date falls between the Start and End dates on the schedule page.

### 1.14 Manual Rate Imports

When Filter by Schedule is selected, you can click **Add Row** to add equipment that is used in this project .

HOME								□ -
								X
Add Row Delete Refresh Row(s) Delete Secial  Undo Show Active Delete Refresh Delete Refresh Paste Special  Undo Show Active Only  Show Active Only  Sort By Code Direction: Asc								Close
Actions Edit Filter Sort								Window
Add Row Project: O								*
Add X Remove Q Find	General	Configure	Line Ite	em Markups	Cost Code	Details/Notes	Budget	Progress
÷	Equipment	Crew M	aterial Tir	mesheet Options	Work Order	Attachments	Mobile Security	Mobile Configuration
	4	signment of equipment t			calculate its daily cost wh	ile assigned.		
	Filter by Schedule		*					
	Drag a column heade	r here to group by that	column					Q
	Unit# Ec	uipment Code	Cost Classification	Start	End Meas	ure Daily Cost		
	T 400 40	c #0c	A D C	-	- *0:	-		
11								

Enter the assignment start and end dates as well as unit of measure and quantity to use in calculating the daily equipment cost.

**NOTE** The rate used in this calculation will be extracted from the Cost Rate Table set up for this project on the Configure tab.

### 1.14.3.6 CREW TAB

Select the personnel/crew filtering option that you want to apply to the project.

• No Filter lets you to select any active person from the personnel list, given the Region security filter.

• Filter by Site Personnel List lets you to select only those individuals who have been associated with the site to which this project belongs.

• Filter by Selected Crews lets you to select only those individuals who belong to the crews selected in the rows below from the crews defined for the site this project belongs to.

#### 1.14 Manual Rate Imports

				figure		n Markups	Cost Code	Details/Notes		Progress
E	quipme	nt	Crew	Material	Time	esheet Options	Work Order	Attachments	Mobile Security	Mobile Configuration
peo	cre	ew list.		vs may work on the st for timesheets		dding them from the states this project	pre-defined site			
ilte	er by se	lected crew	VS	-						
rag	) a colu	mn header l	here to group	by that column						
		Code	Nar	me	Туре	Notes		Message		
r	=	RBC	RBC		RBC	RBC		R B C		

If Filter by Selected Crews is selected, select which crews will be working on this project by selecting the **Add Row** icon located on the ribbon menu.

**NOTE** Crews are defined at the Site level, which is identified in the General tab of the Project.

### 1.14.3.7 MATERIAL TAB

Select the material filtering option that you want to apply to the project.

• No Filter lets you to select any active material from the material list, given the Region security filter.

• Filter by Site lets you to select only those materials who have been associated with the site to which this project belongs to.

• Filter by Materials lets you to select only those materials that belong to the materials selected in the window below.

Eq	quipment	Crew	Material	Timesheet Options	s Work Order	Attachments	Mobile Security	Mobile Configuration
	list.			on this project by adding th	em from the material			
	fy how to filter r by Materials	the Material list f	Tor timesheets ent	ered against this project				
ag		er here to group	by that column					
	Code	Name		Region	Company			
r	RBC	R <mark>B</mark> C		RBC	8 <mark>8</mark> C			
cc0	rd 0 of 0 4							
	rd 0 of 0						OK	Cancel Appl

## 1.14.3.8 TIME SHEET OPTIONS TAB

In the Multi Day time sheet, section set the number of days that will appear by default on a Multi Day time sheet.

#### 1.14 Manual Rate Imports

Equipment     Orew     Material     Timesheet Cybins     Work Order     Attachments     Noble Security     Mobile Configuration	Equipment		ure	Line Item Markups	Cost Code	Details/Notes	Budget	Progress
Set the default number of days that will appear on a multi day timesheet (Max 31)   Days:   Days:   timesheet Numbering   Use project specific timesheet numbering   Start T/S# at:   T/S# to   digits   T/S# Template:   Prefix:   suffix:   Example:   0		Crew	Material	Timesheet Options	Work Order	Attachments	Mobile Security	Mobile Configuration
	Set the defa Days: nesheet Numbering Use p	g g project specific time Start T/S# at: T/S# to Template: Prefix: suffix:	esheet numbering					
	Exar	mple:	0					
	A	Allow user to overri	ide T/S number					

The time sheet Numbering section lets you set up the prefix or suffix for the name you want to use in the naming of your time sheets. It also lets you set the starting number and number of digits you want to use. If you want to allow users to override the time sheet number, check the **Allow user to override T/S number** option.

### 1.14.3.9 WORK ORDER TAB

You can add work orders that will be available on the time sheet page. To add a new work order, from the Work Order tab, select the **Add Row** icon located on the ribbon menu. When the new row appears on the page, provide all applicable information, then click **Apply**.

General	Config	gure	Line Item Markups	Cost Code	Details/Notes	Budget	Progress
Equipment	Crew	Material	Timesheet Options	Work Order	Attachments	Mobile Security	Mobile Configuration
g a column header	r here to group by	that column					
Code	Descri	iption	Start Date	Close Date	Client Contact	Status	HD Phase Code
RBC	8 <b>8</b> C		=	=	RBC	=	8 <b>0</b> 0
ord 0 of 0 🖪							

## 1.14.3.10 PAY ITEMS TAB

Pay Items will be automatically populated from Platform if they have been defined. However, you can also manually add pay items that can then be used on individual WBS items to group them for billing purposes. To add a new pay item, from the Pay Items tab, select the **Add Row** icon located on the ribbon menu. When the new row appears on the page, provide all applicable information, then click **Apply**.

	General	Configure	Line Item Mar	rkups	Cost Code		Details/N	otes
	Equipment	Crew	Material	т	imesheet Options		Work O	rder
	Attachments	Mobile	Security	Mobile	e Configuration		Pay Ite	ms
Drag	g a column heade	r here to group by	that column					Ç
	Pay Item #		Pay Item Des	scription	5	Status		
T	8 <b>0</b> C		RBC			= Activ	ve	
÷	Cost Plus		Cost Plus		1	Active		
	Fixed Final Price	2	Fixed Final Pr	rice	1	Active		
	Time and Materi	ial	Time and Mat	terial	1	Active		
	Unit Price		Unit Price		1	Active		
×	✓ Status	= Active					Er	dit Filter

# ATTACHMENTS TAB

You can upload any pertinent documentation for this project on the attachments tab.

1. To add an attachment, click the Add Row icon located on the ribbon bar.

2. To delete an unwanted attachment, select the row to be deleted by clicking it once and then click the **Delete Row(s)** icon located on the ribbon bar

3. After the new row appears, click the **Folder** icon in the new row in the Attachment column, to select the document you want to upload.

	imesheet Options by that column	Work Order	Attachments		Mobile Security	Mobil	e Configuration	Pay Items
ag a column header here to group l	y that column							
Attachment	T	ype		File Date		S	tatus	
	Ľ1							

4. Locate the document in your folder structure, and then select it.

The attachment name shows in Attachment.

5. Select the type, file date and status from the columns, and then click **Apply** or **OK**.

# WBS STRUCTURE

After all the project tabs have been populated with the required information, you can create the WBS structure.

1. To add a WBS item to a project, right-click the project, and then select Add WBS.

Alternatively, you can click the **Add button**, located directly above the project name to add a new WBS item.

⊕ A	id 🔀 Re	move			Materia	al	Timesheet Options	Work Order	Attachments	Mobile Security	Mobile Configuration	Pay Items
Positi	on 🖹	Code	Description		Gene	eral	Configure	Line Item Markups	Cost Code	Details/Notes	Equipment	Crew
> v		111111.500	*LEM Demo	_		-						
1.7		UNASSIGNED	UNASSIGNED	۲	Add WBS	lame:	"LEM Demo					
	1	998	Accounting Code 1		Collapse	Code:	111111.500					
	2	999	Accounting Code 2			Position:						
	3	1000	Insurance - Not included in Mark Up Cal		Full Expand							
	4	1002	GC Bond Calculation	<b>t</b> =	Full Collapse	Company:	Default					
	5	1004	SDI (\$11.50/\$1000) - Direct Cost Add-O		Expand To Level	Bill To:	Derault					
	6	1005	Procore Charge			5111 10.						<u></u>
	7	1006	Tech Services Charge		Collapse To Level							×

2. Enter the name of the new WBS and the Code or abbreviation to be used for this item and the PO number if required.

3. All other fields under the general tab are optional unless instructed otherwise by the administrator or required for the job. If left empty, these fields inherit values from the parent node, or the parent's parent node.

NOTE Unless a different set of rates needs to be used on this node than those set up at the project node, nothing needs to be set up under the Configure tab. Rate table assignment also follows the inheritance rules as above.

4. To capture data on a time sheet against the project, cost codes must be applied to the project, either at the project node (not recommended), or at the WBS nodes.

5. To apply cost codes, click the Cost Code tab of the applicable project or WBS node .

Cost Code		Description
		*
Cost Code	Description	<b>A</b>
<add code="" cost="" new=""></add>	<add code="" cost="" new=""></add>	
00	Billable	
1005	Survey	
1006	Dewatering	
1015	Grade	
1020	Line Locating	
1025	Hydrovac	<b>v</b>
×		

6. Click the **Add Row** icon located in the ribbon bar, then select the drop-down menu to choose the cost code.

The Budget and Progress tabs are only visible if you specified budgeting configuration information at the root node of the project in the Configure tab.

	Crew		Timesheet Options				
General	C	nfigure	Line Item Markups	Cost Code	Details/Notes	Budget	Progress
Use the filte	er criteria and	the button below	to retrieve the sum of budgets for th	his project.			
now budget type:		rogressive		-			
ow budget effect	tive as of:	an-30-2023	<ul> <li>Retrieve</li> </ul>				
Budget Item			Cost Code		Qty	Hours	\$ Amount
Equipment	Crew	Materia	Timesheet Options	Work Order	Attachments	Mobile Security	Mobile Configuration
Equipment General		Materia	Timesheet Options Line Item Markups	Work Order Cost Code	Attachments Details/Notes	Mobile Security Budget	Mobile Configuration Progress
Track the cor	Co mpletion perce	nfigure					
General	Co mpletion perco tive as of:	infigure intage for this pro an-11-2023	Line Item Markups				

7. In the Budget and Progress tabs, you can retrieve information on the selected job to view.

8. Click **Apply** to complete the setup of the node.

9. Continue to create additional WBS items and any child WBS items that are further required following the steps above.

10. Using the Configure tab of a WBS item, select the applicable pay item that this WBS item belongs to (this might be pre-populated from InEight Control if pay items are maintained there)

10. After all folder levels have completed, click **OK** to save the project and exit the page.

11. After all folder levels have been completed, click **OK** to save the project and exit the page.

NOTE To view the list of projects that have been set up, click on File, Open and Project.

# 1.14.4 PLATFORM PROJECT ASSOCIATION

You can associate Billings with additional master data, such as project data from the Project details page in Platform. Associating Platform projects lets you organize Billings directly from Platform's Organizational Breakdown Structure (OBS). Your location assignment in the OBS determines the access you inherit and your visibility to other OBS areas.

Extracting Platform project master data directly into Billings promotes data consistency and helps ensure that the data is being pulled from a single source of truth.

Platform project-specific master data can be maintained in one place, then it can flow directly into Billings in the cloud.

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If the Billings project was created in Platform, the Project name, Code, and Position fields are disabled and can only be managed in Platform.

# 1.14.5 MANAGING A SITE

Sites are automatically created when a Project is created during synchronization with Platform. The project's name and code are used for the Site Name and Code fields. The purpose of sites is to maintain project specific resources for use in Billings. The labor and equipment named resources, as

well as vendors, assigned to the Project in Platform, are reflected in the Personnel, Equipment and Companies tabs.

To view the list of all sites that have been set up, go to Project Administration > **Sites**. The available columns on the Sites tab are as follows:

- Name
- Code
- Region
- Status

### 1.14.5.11 PERSONNEL TAB

The Personnel tab shows the current resource assignments and is split into two sections, Assign People and Create Crews.

If there are missing resource assignments that are required for billing purposes, and they cannot be added to the project operational resources in InEight Progress, you can click **Add Personnel** to add additional resource assignments. A window shows with the names of available people. Double-click on each individual resource, or single select (highlight) all resources required and click **OK**. Once all required resources have been added to the Personnel tab, click **Apply** to save the updates.

### 1.14 Manual Rate Imports

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Ŧ		Last Name	First Name	Bill As			Shift	Sync	Sta	tus	Ord	ler
-	Personnel Res a column header		by that column	1								
_	Code	Last Name	-	Name	Source	Billing Clas	Cost C	assi	S	Region		Company
F	R B C	RBC	8 <mark>8</mark> C		8 <mark>8</mark> C	RBC	RBC		RBC	8 <mark>8</mark> C		RBC
	1266	Smith	Johr	1	Emplo	Executive	Execut	ive	D	Alberta		Compan
L	1599	Witter	How	ard	Emplo	Truck Driver	Truck [	Driver	D	Alberta		Company
L	1761	Gerstel	Crys	tal	Emplo	Manager	Manag	er	D	Alberta		Company
:	2338 Status	Krawiec       Active	Ken		Emplo	Executive	Execut	IVE	D	Alberta		Companio

On the right side, you can further restrict who can work on any one project by creating site crews and assigning personnel to each specific crew they are associated to.

### 1.14 Manual Rate Imports

		te site crews and add	personnel to them by dragging	and dropping the p	personnel rows from the left side of t	ne
	butto	n. You can override	the personnel attributes within	a crew.	personnel rows from the left side of t	
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Re	cord 1 of 3	1 <				

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Click the **Add personnel** button located above the Personnel tab to launch the Personnel List dialog box. You can select multiple records using the mouse and holding the Ctrl key to select each applicable record, or select a range of records by selecting the first record, holding the Shift key, and then selecting the last applicable record. Click **OK** to bring the selected records to the page.

Code	Last Name	First Name	Source	Billing Clas	Cost Classi	S	Region	Company	Payro	
88C	88C	8 8 C	RBC	RBC	RBC	8 B C	RBC	88C	RBC	=
1599	Witter	Howard	Emplo	Truck Driver	Truck Driver	D	Alberta	Company	On P	Act.
1761	Gerstel	Crystal	Emplo	Manager	Manager	D	Alberta	Company	On P	Act.
2338	Krawiec	Ken	Emplo	Executive	Executive	D	Alberta	Company	On P	Act.
2441	Thibault	Ron	Emplo	Estimator - 1	Estimator - 1	D	Alberta	Company	On P	Act.
2488	Hartmann	Barbara	Emplo	Site Admini	Executive	D	Alberta	Company	On P	Act.
2568	MacMullin	Kevin	Emplo	Superinten	Superinten	D	Alberta	Company	On P	Act.
2606	Biedron	Angelika	Emplo	Site Admini	Project Co	D	Alberta	Company	On P	Act.
2791	Sagert	Laurence	Emplo	Warehous	Warehous	D	Alberta	Company	On P	Act.
30000	Seveck	Jeremie	DSP	Iron Work	Superinten	D	Alberta	DSP Comp	On P	Act.
30019	Watts	Clint	DSP	Welder - B	Welder - B	D	Alberta	DSP Comp	On P	Act.
30024	Anderson	Barry	DSP	Constructi	Constructi	D	Alberta	DSP Comp	On P	Act.
30027	Cross	Brymer	DSP	Pipefitter	Pipefitter	D	Alberta	DSP Comp	On P	Act.

After an individual is assigned to the site, additional details can be entered, such as timesheet entry display Order, Site Code (usually customer driven), Shift Rotation, Start Date, End Date, and User Def 1-4. The Shift Rotation is populated from the Personnel tab by default (if assigned on the global resource record) but can be overridden. Shift Rotation selections are defined in the Options menu under the Drop-Down List Setup, Shift Rotation Type.

NOTE You can override a worker's default Bill and Cost Classifications while they are part of the crew, by changing the Bill As and Cost As fields for the individual. These changes will be the new default for time sheets when using these resources on a project, where the project has the crew option enabled (Project Administration Project Crew Filter by selected crews).

Use the right side of the page to create crew definitions for the site. Create crews by using the **Add Crew** button, located at the top of the page. Enter the crew's name and assign the crew a code, then click **Apply**. NOTE An individual can be part of multiple crew definitions at the same time. To view the crew list, expand the crew definition by using the + button next to the crew code.

### 1.14.5.12 EQUIPMENT TAB

The Equipment tab lets you view and maintain a list of equipment attached and assigned to the site. User Def 1-4 can be set in the Site List. Select the Add Equipment button, located at the top of the page to show the Equipment List dialog box. You can select multiple records using the mouse and holding the **Ctrl**key to select each applicable record or select a range of records by selecting the first record, holding the **Shift**key, and then selecting the last applicable record. Click **OK** to bring the selected records to the page.



# 1.14.5.13 MATERIALS TAB

The Materials tab lets you view and maintain a list of material attached and assigned to this site. User Def 1-4 can be set in the Site List. Click the **Add Material** button, located at the top of the page, to bring up the Material List dialog box. You can select multiple records using the mouse and holding the ctrl key to select each applicable record, or select a range of records by selecting the first record, holding the shift key, and then selecting the last applicable record. Press **OK** to bring the selected records to the page.

code	ader here to group by that column Name		Region	Compan	w		Liser Def 1	User Def 2	Licer Def 3	User Def 4		
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Code		Region	Material Type	Billing Classification	Status	T Compar	ıy					
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× 🗸	Status = Active					E	dit Filter					
Refre	resh				ОК	Can	e					
							1.11					

### 1.14.5.14 COMPANIES TAB

The Companies tab is used to assign companies to the site by using the **Add Company** button. When assigned, you can configure project or WBS items related to this site to limit the timesheet company lists to the pre-assigned list.

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т	RBC		RBC			RBC		R B C	RBC	RBC	8 8 C	
Reco	rd 0 of 0	4										þ

## 1.14.5.15 CONTACTS TAB

The Contacts tab lets you view and maintain a list of contacts associated with this site. Click the **Add Contact** button located at the top of the page, to add additional contacts to this list.

Sites Site O		
General Area Personnel Equipment Material	Contact	
Assign contacts to the site by using the 'Add Contac	set button.	
Add Contact      K Remove Contact		
Type: Name:     ^       Contact Type:     ^       First Name:		
Record 1 of 1 4		÷
	OK Centel A	kpply

# 1.15 TIMESHEETS OVERVIEW

# 1.15.1 UNDERSTANDING TIMESHEETS

Timesheets get posted to Billings in the following ways:

- Creation of a daily plan that is set to Approved
- Creation of a weekly time sheet
- Manual creation of a time sheet directly in Billings
- Submission of a timesheet from the Billings Timesheet mobile app
- External system that publishes billing related records directly into Billings via APIM feed
- Time sheet import, where a user manually uploads a time sheet into Billings

Billings supports the following types of time sheets:

- Single Day, Single Project
- Multi Day, Single Project
- Multi Day, Multi Project

To view the time sheets tab and all time sheets that exist in the system, go to time sheets > time sheets.

The available columns on the time sheets tab are as follows:

- Timesheet #
- Work Date
- Timesheet ID
- Job #
- Root Project
- Name
- Region
- Company
- Days
- Status
- Type
- Approval Status
- Close
- Created By
- Created Date
- Timesheet Total
- Modify By
- Modify Date
- Park

# 1.15.1.1 TIME SHEET STATUS RULES

Timesheet Status	Timesheet and Approval Status Rules
Open	All items contained on the time sheet can be modified or deleted, and new items will be added if you have the applicable security permissions.
Locked	The time sheet contains items that have been invoiced or exported. Exported or invoiced time sheet line items cannot be modified or deleted but new lines/items can be added or modified by an Administrator or Power User until they too are invoiced or exported.
Closed	Time sheet cannot be modified
Pending Approval	All items contained on the Time sheet can be modified or deleted and new items will be added, providing the user has security permission.
User Defined (optional)	All items contained on the Time sheet can be modified or deleted and new items can be added, providing the user has security permission.
Un-invoiced	Time sheet cannot be modified. Un-invoiced Time sheet items will be eligible for

Timesheet Status	Timesheet and Approval Status Rules
	invoicing. Time sheet status must be changed to Pending approval or user defined status to make any modifications.
Parked	Time sheet is temporarily unavailable for exporting and invoicing until Parked status is removed. When <i>Parked</i> status is removed, time sheet returns to the status it had prior to being parked.

# CREATING A SINGLE DAY, SINGLE PROJECT TIME SHEET

1. To create a single day, single project time sheet, go to Timesheets > **Timesheets**.



2. From the ribbon bar, select the timesheet type by using the drop-down arrow on the New icon, and select **Single Project - Daily**. A new Timesheet window opens.

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	0000019386				de Day Timesheet		0000019386			DEMO	KIEWIT DEMO(DEMO)	Alberta	Mining Company	Jan-13-2023		1 Open	

3. Click the three dots icon located to the right of the Project field. A Project search display opens.

4. Find and select the Project that this timesheet is for by using the Project Root or Code drop-down list.

oject:					T/S ID:			Ordered By:					
egion:		- Compar	nv:		T/S #:			Location Billed To:					
vision:		*			Job #:			Client #:					
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g a column header here to group by that	column		BMT Burnaby Mountain Tunnel(1	.892)									
Unit # Personnel Nar	ne Perso	nel G	> S7 Spread 7(2672)				ST	OT	DT	DTH	π	LOA	
			> ST Sumas Terminal(3052)										
					OK	Cancel							
				_	OK	Cancel							
and 1 of 1 <					OK	Cancel	.00	.00	.00	.00	.00	.00	

The project work breakdown structure (project tree) will appear in the main area of the Project display.

5. Select the applicable project folder by double clicking it. This returns the name of the folder selected to the Project field on the Timesheet entry page.

NOTE

Selecting a more detailed level of the project using the tree picker filters the available project/cost code paths when entering Labor, Equipment, Material, and Line Items.

6. The project name will be filled in the Project field in the time sheet entry screen. The Region and Client fields will default to the selected project's region and client values (or those inherited from the parent tree nodes of the selected project tree structure).

ject:	KIEWIT DEMO(DEMO)			T/S ID:		Ordered By:	
gion:	Alberta	<ul> <li>Company:</li> </ul>	Mining Company	T/S #:		Location Billed To:	
ision:		-		Job #:		Client #:	
				Date:	Jan-30-2023 👻	T/S Total:	\$0.00

7. If the selected project has been configured to use automatically generated Timesheet numbers, skip to the next step; otherwise click on the Timesheet # field, and then enter the unique Timesheet number for this Time sheet.

NOTE You can leave the Time sheet # field blank, in which case the Time sheet # field is automatically generated by the database and matches the system generated Time sheet ID.

8. In the Date field, select the date when the work was performed.



### 1.15.1.2 PERSONNEL TAB

There will be several columns listed in the Personnel tab, as well as some columns hidden. However, to speed up the process of data entry, it is beneficial to remove or add only the necessary columns.
If a column from the Personnel tab is needed on the Time sheet layout, you must add it before data can be entered into it. Right click any column header, and then select Column Chooser to view this list. You can then drag and drop any of the additional fields into the Timesheet view or remove any fields that are not required.



NOTE You can control where the new column will be displayed on the page by dragging and dropping the column headers in the desired location, as identified with the black line.

After a layout has been created or modified with the columns relevant for data entry, save the layout by expanding the Layout drop-down menu and then selecting Save As. A window opens, to allow you to name the layout. This layout is specific only to you. It is not available to other users unless you or an Administrator share it. After the layout has been saved, you can click **Set Default**, which makes it the default view when you enter the Timesheet page in the future.

NOTE When creating a timesheet layout, keep in mind that multiple layouts can be created and saved. It can be beneficial for the user to create a layout for when they are entering data and another layout for when they are auditing the data entered.

After the layout has been modified, go into the Personnel field on the page and either begin typing the last name or use the drop-down menu to pull up a list of personnel.

Vinit #     Personnel Koder     Vicit #     Cost As     Svift     Cost Code     ST     OT     DT     DT     DT     LOA       Name     Code     Cossification     Region     Cassification     Region     Status     A       Anno Privida     J03391     X/C_Jabourer     KC-LBSR     Aberta     Active     Active       Assem Mahala     J0938     Popefitter - So.     PF-JM     Aberta     Active     Active       Abdia Brive Abdia     J1711     U.G.Labourer     KC-LBSR     Aberta     Active     Active       Abdia Hrole Abdia     J19391     Registrer - So.     PF-JM     Aberta     Active     Image: Calabourer     Image: Calabourer
Name     Cook     Cook     Cook     Cook     Cook     Cook     Cook     Cook       Andro Prext     CC, Jabourer     (CC, Jabourer)     (CC, Jabourer)     (CC, Jabourer)     Active       Andro Prext     CO     Size     Active     Active       Andro Prext     Size     Active     Active       Andro Prext     Size     Active     Active       Andro Prext     Size     Active     Active       Ababo Diva     31038     Poefiter - 3     PF-3M     Aberta     Active       Abda Haude     3077     Poefiter - 3     PF-3M     Aberta     Active
Name     Other     Other     Output     Output     Output       Araon Fireta     10391     KC, Maser     K Cells     Active       Araon Fireta     13500     KC, Lisbourer     K Cells     Active       Araon Fireta     13500     KC, Lisbourer     K Cells     Active       Abasen Micha     908     Petiter -b     Fr.34     Active       Abasen Micha     1308     Petitter -b     Fr.34     Active
Aaron Frick         IO331         XC_Weider         KC-WOOM         Aberta         Active           Aaron Frick         15800         XC_LBAURCT         KC-BSC         Aderta         Active           Aaron Kindus         Sol         Popertiza-Jos         KC-LBSC         Aderta         Active           Ababinetiza         Sol         Popertiza-Jos         Pi-JM         Aderta         Active           Ababinetiza         Sol         Popertiza-Jos         Pi-JM         Aderta         Active           Ababinetiza         Johnetiza         KC-LBSC         Active         Active         Active           Ababinetiza         Sol         Popertiza-Jos         Pi-JM         Aderta         Active         Active           Ababinetiza         Sol         Popertiza-Jos         Pi-JM         Aderta         Active         Active
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Assen Michael     S0998     Ppefilter - Ju     PF-34     Aberta     Active       Ababic Bive     31038     Ppefilter - Ju     PF-34     Aberta     Active       Abdri Hride Abd     17412     XC_Labourer     KC-LABSR     Aberta     Active       Abdri Huseh     30937     Ppefilter - Ju     PF-34     Aberta     Active
Abdie Orivi         31038         Pepefiter - b_m         PF-JM         Aberta         Active           Abd Horek Abd         174112         XC_1abourner         KC-1abourner         Active           Abd Hussen         0397         Pepefiter - b_m         PF-JM         Aberta         Active
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Abd Hussein 30937 Ppefitter-Jo PF-JM Alberta Active 🕶
×

The Bill As, Cost As, and Shift fields automatically populate with the default values specified for the person selected. However, if the person whose time is being entered is to be billed out or cost as another classification, the Bill As or the Cost As field(s) can be changed to the appropriate personnel classification to ensure the time sheet is invoiced and cost coded appropriately. For example, if a Journeyman is promoted for a day, since it is a temporary change to the classification, the Bill As field can be changed as needed on a single timesheet line/item without changing the person's default classification.

## 1.15.1.3 COST CODE FIELD

Press the **Tab** key to go to the Cost Code field. Click the drop-down to display a list of cost codes defined for the selected project node (and any child WBS items). How the project is set up determines how the cost code list is shown.

	Material Line Items Deta													
Unit #	Personnel Name	Personnel Code	Bill As	Cost As	Shift	Cost Code		ST	ОТ	DT	DTH	π	LOA	D
						Cost Code								
						<edit code="" cost="" list=""> 2672/2875/2876/2877/00 2672/2875/2896/2899/00 2672/2875/2896/2900/00 2672/2875/2914/2915/00 2672/2875/2914/2924/00 2672/2875/2914/2924/1005</edit>	Ţ							

**NOTE** The list of cost codes is embedded in a project path. This path is created by following the folder levels of the WBS structure so that the costs are allocated to the proper area. For example, if the path is 1/EXT/PIP/11.01, this means that the costs are going to Plant 1, Extraction Area, Piping, and Cost Code 11.01.

The next set of fields determines the billing type for the units. Dependent on the project contract, Personnel can be billed out for ST, OT, DT, DTH, TT, Day, and LOA.

If multiple personnel are being used for the job, click on the **Add Row** icon located on the ribbon bar to add a row, or use the **Tab** key to move all the way to the right of the page and press **Tab** again to generate a row.

NOTE Billings automatically copies most of the information from the previous row to a new row. To remove a row, click the **Delete Row(s)** icon located on the ribbon menu.

### 1.15.1.4 EQUIPMENT AND MATERIAL TABS

Perform similar steps to enter equipment on the Equipment tab, and materials on the Material tab. Both Equipment and Materials that appear from the drop-down list will be filtered if the project that the time sheet is being charged against has been set up to filter the Equipment or Material lists.

a column header her	e to group by that column					
Jnit #	Equipment	Code	Bill As	Cost Code	Measure	Quar
101	Truck - 1/2T-1T Crew	- 101	Truck - 1/2T-1T Crew (13-01)		Hours	

## 1.15.1.5 LINE ITEMS TAB

When there is data that needs to be entered, but it does not fall within the predefined units of measure on the Personnel, Equipment, or Materials tabs, you can enter it on the Line Items tab.

ag a colu	umn header here b	group by tha	at column										
Line I	Item Assignment					Details							
Re	Assigned to		Source	PO #	Cost Code	Description	Туре	Measure	Quantity	Rate	Amount	Attachment	Attachment File D
								Each					

The Line Items tab offers the flexibility to enter any other items that are related to the time sheet that do not neatly fall into the predefined categories of Personnel, Equipment or Materials. This can include expenses, premiums and allowances, surcharges, rental fees, or other additional fees that are related to the time sheet. If required, a line item can be assigned to a person (e.g., small tools allowance, equipment rentals, other premium, etc.), a piece of equipment (such as., repairs, additional charges), material (such as, a hauling charge), or entered as an Other line item.

The Line-Item tab lets you:

- Allot a Custom Description to the item
- Charge it to a cost code (required)
- Attach it to an applicable PO #
- Assign a unit of measure
- Track the quantity
- Key the rate instantaneously

## 1.15.1.6 DETAILS TAB

The Details tab lets you capture any field notes associated with the time sheet and also enter data into any custom time sheet fields set up by the application administrator.



Additional time sheet details can be captured in the Diary tab.

y of the Crew experience an injury today that was not reported? If so, please describe.		Safety Concerns	Conversations W/ Owner	
	<b>^</b>	Work Performed	Visitors to Site	
		X-tra Work Performed	Equipment Damage	
		Cost Impacts	Other Observations	
	Ψ	Schedule Impacts	Inddents	
y incidents occur today that need to be reported? If so, please describe.		Lessons Learned	Injuries	
		Weather Conditions		
				<u>^</u>
	Ψ			Ψ
other information is relevant to support noted items from the Daily Diary Checklist?	<u>^</u>	Temperature		
				A
				-

When you're done entering data into the time sheet, click on **Apply** or **OK**.

NOTE The Park and Close fields affect time sheets that need to be put on hold or closed.

To view the Time sheets tab and all time sheets that have been created, select Timesheets > **Timesheets**.

The available columns on the time sheets tab are:

- Time sheet #
- Work Date
- Time sheet ID
- Job #
- Root Project
- Name
- Region
- Company
- Days
- Status
- Type
- Approval Status
- Close
- Created By
- Created Date
- Time sheet Total
- Modify By
- Modify Date
- Park

### CREATING A TIMESHEET LAYOUT

1. Right click any column header and select Column Chooser to view this list.

You can then drag and drop any of the additional fields into the time sheet view or remove any fields that are not required.



NOTE You can control where the new column will be displayed in the grid by dragging and dropping the column headers in the desired location. You can also select **My Column Caption** to rename the column headers.

2. After you have created a layout with the columns relevant for data entry, you can save the layout by selecting the Layout drop-down from the top right side of the tool bar.

#### 3. Click Save As.

The Save Layout As dialog box opens, and you can name the layout.

This layout is specific only to the user logged into Billings. It will not be available to other users unless it is shared by the user or an Administrator.

4. After the layout has been saved, the user can select Set **Default** which will make it the default view when they access the Timesheet page in the future.

Save Save Save As System Default Set Default Remove Default Remove	Layout Close
System Default Set Default Remove Default Remove	 Save
Set Default Remove Default Remove	Save As
Remove Default Remove	 System Default
Remove	Set Default
	Remove Default
	Remove
Share	Share

InEight Billings	×
Save Layout As	
	OK Cancel

# 1.15.2 CREATING A MULTI-DAY, MULTI-PROJECT TIMESHEET

## CREATE A MULTI DAY, MULTI PROJECT TIME SHEET

1. To create a multi-day, multi-project time sheet, go to Timesheets > **Timesheets**.



2. From the ribbon menu, click the **New** icon, and then select Multi-Project > **Daily**. A new Timesheet window opens.



3. Click the Timesheet # field and enter in the number of the time sheet.

NOTE You can leave the Timesheet # (T/S) field blank, in which case the Timesheet # will automatically generate from the database and will match the system-generated Timesheet ID.

4. Click the **Start Date** drop-down arrow and select the starting date of the time sheet (that is, the first day the work was performed or the first day of the shift).

T/S ID:		Job #:		Ordered By:	
T/S #:		Start Date:	Feb-01-2023 +	Location Billed To:	
Region:	Payroll (EMP & DSP)	<ul> <li>Number of Days on T/S:</li> </ul>	5 🗘	Client #:	
Division:		Company:			

5. Adjust the Number of Days on Timesheet if needed.

6. Click the three dots icon next to Company field to select the client this work was done for.

			Job #:			Ordered By:									
			Start Date:	Feb-0	1-2023 -	Location Billed To:									
Payroll (EMP & DSP)			<ul> <li>Number of Days</li> </ul>	s on T/S: 5	÷	Client #:									
			Company:												
t Material Line Items	Details Diary	Attachments													
		Companies					×				Thu Feb-0	2-23			
Personnel Name	Bill As					-	LOA	DAY	ST O	T DT	T DTH	π	LOA DA	Y ST	
		Drag a column header here to group by that	column				2								
		Name		Code	Relationship Type	Status	T								
		T AD:		a∎c	a⊡c	= Active	*								
		Company		COMP	Owner	Active									
		SemCAMS ULC		1063	Client	Active									
		Ovintiv Canada ULC		1031	Client	Active									
		Canadian Natural Resources Limited		1061	Client	Active	Ŧ								
		× 🗸 Status = Active				Edi	Filter								
		Refresh				OK Cancel									
	Material Line Items	Material Line [tems Details Diary	Biterial     Line [tems     Details     Dary     Attachments       Personnel Name     Bit As     Drag a column header here to group by that       Verter Canada     Company       SemCMS LLC     Overtry Canada       Overtry Canada     LLC       Verter Canada     Nature       X     Status	Start Date: Payrol (BMP & DSP)	Payroll (DVP & DSP)     •       Martenial     Line (tems       Details     Dary       Attachments         Personnel Name     Bill As       Drag a clumn header here to group by that column       Variable     Orag a clumn header here to group by that column       V     Orag a clumn header here to group by that column         V     Orag a clumn header here to group by that column         V     Orage a clumn header here to group by that column	Bit A     Company:	Payroll (3P4 & D5P)     •     Start Date:     Peł-01-2023 •     Location Billed Ter:       Payroll (3P4 & D5P)     •     Number of Days on T/S:     S 2     Clent #:         Marker of Days on T/S:     S 2     Clent #:         Marker of Days on T/S:     S 2     Clent #:         Marker of Days on T/S:     S 2     Clent #:         Marker of Days on T/S:     S 2     Clent #:         Personnel Name     Bil A     Company:     Code         Personnel Name     Days aclumn header here to group by that column         Versonnel Name     Code     Relationship Type     Status         Viet Octopary     Code     Relationship Type     Status       V     Qtr     Qtr     Qtr     Qtr     Qtr     Qtr     Active       Condoan Natural Resources Limited     Ubility     Clent     Active         V Status     Edit	Payroll (BVP & DSP)     Start Date:     Per 0-12:023 •     Locator Billed To:       *     Number of Days on T/S:     S •     Clent #:	Payroll (DVP & D.DSP) <ul> <li>Number of Days on T/B:</li> <li>Company:</li> <li>Compan</li></ul>	Bart Date:       Peh-01-2023 •       Location Billed Te:         Payred (BVP & DSP)       •       Number of Days on T/S:       5 1         Gregory:       •       Company:       •         *       Company:       •       •         Personnel Name       Bil As       Company:       •         Image: Company:       •       •       •         Manne:       •       •       •         V       Oc       Relatorship Type       Status       V         V       Oc       Opin       Achive       •         Condoan Istanal Resources Limited       1061       Clent       Achive       •         V       Status       •       •       •       •       •         V       Status       •       •       •       •       •         V       Oc       Opin       Achive       •       •       •       •         V       Status       •       •       •       •       •       •       •       •	Bit As       Companies       Code       Relationship Type       Status       V       Or       Or </td <td>Bit date:       Feb-01-2023 *       Location Billed To:         *       Number of Days on T/S:       S :       Clent #:         *       Company:       Company:       Company:         *       Company:       Company:       Company:         *       Company:       Company:       Thu Feb-0.         *       Company:       Company:       Company:         *       Company:       Company:       Company:         *       To ga column header here to group by that column       Name       Code       Relationship Type       Status       T         *       *       Company:       Code       Relationship Type       Status       T       T       T         *       *       Status       Company:       Code       Code       Active       Edit Filter         *       *       Status       Company:       Edit Filter       Edit Filter       Edit Filter         *       *</td> <td>Bit A         Companies         Companies         Code         Relationship         Code</td> <td>Bit As         Companies         Companies         Thu Feb-02-203         Control Feb 02-203         Contr</td> <td>Bit As         Companies         C</td>	Bit date:       Feb-01-2023 *       Location Billed To:         *       Number of Days on T/S:       S :       Clent #:         *       Company:       Company:       Company:         *       Company:       Company:       Company:         *       Company:       Company:       Thu Feb-0.         *       Company:       Company:       Company:         *       Company:       Company:       Company:         *       To ga column header here to group by that column       Name       Code       Relationship Type       Status       T         *       *       Company:       Code       Relationship Type       Status       T       T       T         *       *       Status       Company:       Code       Code       Active       Edit Filter         *       *       Status       Company:       Edit Filter       Edit Filter       Edit Filter         *       *	Bit A         Companies         Companies         Code         Relationship         Code	Bit As         Companies         Companies         Thu Feb-02-203         Control Feb 02-203         Contr	Bit As         Companies         C

## 1.15.2.7 PERSONNEL TAB

The Personnel tab includes columns that might normally be hidden. To speed up the process of data entry, it is beneficial for you to include only the necessary columns.

## 1.15.3 CREATING A MULTI DAY, SINGLE PROJECT TIMESHEET

### CREATE A MULTI DAY, SINGLE PROJECT TIME SHEET

- 1. Go to Timesheets >**Timesheets**
- 2. From the ribbon menu, click the New icon, and then select Single Project Weekly.

esheets	Timesheet - Single Day:									
ject:	DEMO(DEMO)			T/S ID:			Ordered By:			
jion:	Alberta	<ul> <li>Company:</li> </ul>	Mining Company	T/S #:			Location Billed To:			
ision:		•		Job #:			Client #:			
				Date:	Jan-30-2023 ×		T/S Total:	\$0.00		
sonnel Eguip	pment Material Line Items Details Diary	Attachments								
any of the Crev	w experience an injury today that was not reported? If	so, please describe.			Safety Concerns	Conversations W/ Owner				
				A	Work Performed	Visitors to Site				
					X-tra Work Performed	Equipment Damage				
					Cost Impacts	Other Observations				
				v	Schedule Impacts	Incidents				
ny incidents or	ccur today that need to be reported? If so, please desc	ribe.			Lessons Learned	Injuries				
				A.	Weather Conditions					
										A
				-						-
t other informa	ation is relevant to support noted items from the Daily D	iary Checklist?								
				A	Temperature					
										<u>^</u>
				v						
	Park Close Last Created T/S #									
ulti Line Entry								✓ New T/S after Apply	OK	Cancel Ap

3. Click the elipses icon located to the right of the Project field and select the project that this time sheet is for by using the Project Root or Code drop-down list.

ject:	KIEWIT DEMO(DEMO)				T/S ID:			Ordered By:		
jion:	Alberta	- Company:	Mining Company		T/S #:			Location Billed To:		
ision:		-			Job #:			Client #:		
		Project						T/S Total:	\$0.00	
		Project Root:	KIEWIT DEMO			-				
		Code:	DEMO			-				
		Name								
onnel Eg	uipment Material Line Items Details Diary	F	VIT DEMO(DEMO)							
			3MT Burnaby Mountain Tunnel(1893	2)						
any of the Cr	rew experience an injury today that was not reported? If s	<u>&gt;</u> ;	57 Spread 7(2672)				Conversations W/ Owne	r		
		>	ST Sumas Terminal(3052)				Visitors to Site			
							Equipment Damage			
							Other Observations			
							Incidents			
any incidents	s occur today that need to be reported? If so, please descr	be					Injuries			
										A.
										~
at other infor	mation is relevant to support noted items from the Daily Di	rv								
										A.
					OK	Cancel				
										-

4. The project name is auto-filled. The Region, Division, and Company fields are automatically populated based on the project selected.

oject:	DEMO(DEMO)			T/S ID:		Ordered By:	
gion:	Alberta	<ul> <li>Company:</li> </ul>	Mining Company	T/S #:		Location Billed To:	
vision:		*		Job #:		Client #:	
				Date:	Jan-30-2023 👻	T/S Total:	\$0.00

5. If the selected project has been configured to use automatically generated time sheet numbers, skip to the next step. Otherwise, click on the **Timesheet #** field and enter in the number of the timesheet.

NOTE You can leave the Timesheet # field blank, in which case the value in the Timesheet # field is automatically generated by the database and matches the system-generated Timesheet ID.

6. Select the starting date of the time sheet (that is, the first day the work was performed or the first day of the shift).



7. Adjust the Number of Days on the time sheet if needed.

The Personnel tab includes columns that might normally be hidden. To speed up the process of data entry, it is beneficial for you to include only the necessary columns.

The Bill As, Cost As, and Shift fields automatically populate with the default values specified for the person selected. However, if the person whose time is being entered is to be billed out or cost as another classification, the Bill As or the Cost As field can be changed to the applicable personnel classification to ensure the time sheet is invoiced and costed appropriately.

For example, if a Journeyman is promoted for a day, since it is a temporary change to the classification, the Bill As field can be changed as needed on a single time sheet line or item without changing the person's default classification.

Press the Tab key to move to the Cost Code field.

Click on the drop-down arrow to display a list of cost codes defined for the selected project node (and any child WBS items). How the project is set up determines how the cost code list shows.

	Sutarali Line Jama Detak	Dary #3admen	u .										
	to group by that calumn												5
LINE #	Parazenel Name	BÎ AL	Pensannel Code	Cost: No	5. SM	Cast Code	 27	CT.	DT	DUH!	77	LDB	0.4
						Cast Cade							
						Could Code (Edit: Cost Code Lation)							
						SERVICE CORP. CONTRACTOR							
						2672(3875(3896)2809(00)							
						28/72)28/78(2899)/2900)/00							
						2672(2875(2914/29:5)00							
						38125(3812)(3814)(3804)(00							
						2672(3875(39.14/2904)1005							
						*							
							.00	.80	.00	.00	.09	.09	
ediof1 <													

The next set of fields is used to capture the quantity of hours worked per type of hours. Depending on the project contract, personnel hours can be recorded against ST, OT, DT, DTH, TT, Day, and LOA.

If time for multiple persons is being used for the job, click on the **Add Row** icon located on the ribbon bar to add another row, or use the **Tab** key to move all the way to the right of the page and press **Tab** again to generate a row.

### NOTE

Billings automatically copies most of the information from the previous row to a new row. To remove a row, click on the **Delete Row(s)** icon located on the ribbon menu.

If you are entering the same data for multiple personnel rows, it is more efficient to use the multiline entry dialog box than manually entering individual rows. The multiline entry dialog box lets you select several personnel records and apply same cost codes, quantities, and units of measure to these rows in one step. If you select multiple cost codes, multiple rows are created for each personnel record and cost code record selected.

### 1.15.3.8 EQUIPMENT AND MATERIAL TAB

You can follow the same functionality to enter equipment on the Equipment tab, and materials on the Material tab that you followed for the Personnel tab.

	group by that column					
t #	Equipment	Code	Bill As	Cost Code	Measure	
	<ul> <li>Truck - 1/2T-1T Crew</li> </ul>	101	Truck - 1/2T-1T Crew (13-01)		Hours	

Some columns are normally less used so they must first be added to the Timesheet layout before data can be entered into them. Right-click any column header, and then select **Column Chooser** to view this list. You can then drag and drop any of the additional fields into the Timesheet view or remove any fields that are not required.

NOTE You can control where the new column displays on the page by dragging and dropping the column header to the desired location.

a column header here to group by that												
Unit # Personnel Na	me ▼ Perconnel Cod	Bill As	Cost As	Shift	Cost Code	ST	OT	DT	DTH	π	LOA	1
	Z Sort Descending											
	💽 Group By This Column											
	Hide Group By Box											
	Hide This Column											
	E Column Chooser											
	+A+ Best Fit											
	Best Fit (all columns)											
	Filter Editor											
	Show Find Panel											
	Show Auto Filter Row											
	Filter Mode											
	My Column Caption											

### 1.15.3.9 LINE ITEMS TAB

The Line Items tab offers the flexibility to enter any other items related to the timesheet but that do not neatly fall into the predefined categories of Personnel, Equipment or Materials. This can include

expenses, surcharges, premiums, allowances, or other additional fees that are related to the time sheet.

If required, you can assign a line item to a person (for example, small tools allowance, or equipment rentals, premium, or allowance), a piece of equipment (for example, repairs or additional charges), material (for example, hauling charge), or entered as an Other line item.

Line Re.

The Line-Item grid lets users:

- Allot a Custom Description to the item
- Charge it to a cost code (required)
- Attach it to an applicable PO#
- Assign a unit of measure
- Track the quantity
- Key the rate instantaneously
- Track the item against Project Commitments (See Assigning Commitments to Projects section of this guide)

Right click any column header and select Column Chooser to view this list. You can then drag and drop any of the additional fields into the time sheet view or remove any fields that are not required.

NOTE You can control where the new column will be displayed in the grid by dragging and dropping the column headers in the desired location.



NOTE

Right click on the column header that you wish to rename and select My Column Caption option. If you wish to use the default name, blank out the custom name.

Once you have created a layout with the columns relevant for data entry, save the layout by selecting the Layout drop-down from the top, right side of the tool bar. If this is a new layout, select **Save As**. If you are saving changes to an existing layout, select **Save**.

## 1.15.3.10 DETAILS TAB

On the Details tab, you can capture any field notes associated with the time sheet, and enter data into any custom timesheet fields set up by the application administrator.



#### You can capture additional time sheet details on the Diary tab.

A	Safety Concerns Work Performed X-tra Work Performed	Conversations W/ Owner Visitors to Site Equipment Damage
*		
Ŧ	X-tra Work Performed	Equipment Damage
		Equipment bornage
-	Cost Impacts	Other Observations
	Schedule Impacts	Incidents
	Lessons Learned	Injuries
A.	Weather Conditions	
		*
-		v
<b>A</b>	Temperature	
T		Υ
	A V V	Westler Conditions

Upon completion of time sheet data entry, click **Apply** or **OK** at the bottom right of the page to save your changes.



NOTE The Park and Close fields affect time sheets that need to be put on hold or closed.

### CREATING A TIME SHEET LAYOUT

1. Right click any column header on one of the timesheet grids and select Column Chooser to view a field list.

You can then drag and drop any of the additional fields into the time sheet view or remove any fields that are not required.



NOTE You can control where the new column will be displayed in the grid by dragging and dropping the column headers in the desired location. You can also select My Column Caption to rename the column headers.

2. You can control where the new column shows on the page by dragging and dropping the column headers to the location.

You can also select My Column Caption to rename the column headers.

3. After you have created a layout with the columns relevant for data entry, you can save the layout by selecting the Layout drop-down from the top right side of the ribbon bar.

### 4. Click Save As.

The Save Layout As dialog box opens, and you can name the layout.

This layout is specific only to the user logged into Billings. It will not be available to other users unless it is shared by the user or an Administrator.

5. After the layout has been saved, the user can select Set *Default* which will be the default view when they access the Timesheet page in the future.

	Layout Close   Save Save   Save As System Default   Set Default Remove   Remove Share		
InEight Billings	ut As	OK	Cancel

NOTE When saving a layout, it is best practice to modify all the tabs (that is, Personnel, Equipment, Material, and Line Items) that will be used in the specific layout being saved.

6. After the layout has been modified, click into the Personnel Name field on the page and either begin typing the resource last name or use the drop-down list to pull up a list of personnel resources.

Norm         Col         Backdam         Backdam         Backdam         Backdam           4xx7brez         (100)         4_2/3mrz         6203         4804         4804           4xx8brez         (100)         4_2/3mrz         6203         4804         4804           4xx8brez         (100)         4_2/3mrz         6203         4804         4804           4xx8brez         (100)         4_2/3mrz         6204         4804         4804           4xx8brez         (100)         4_2/3mrz         62/3mrz         4804         4804           4xx8brez         (100)         4_2/3mrz         62/3mrz         4804         4804	Parsonnel Stane		. BLA	Tecore	wi Code	fort by	203	Cast Code	27	or	57	07H	 LDB	
Image         Gal         Balandaria         Balandaria													 	
andbaset         (NIIII)         C_Allower         COLDIN         deside           andbaset         C_Allower         COLDIN         deside         deside           andbaset         Colline         Colline         deside         deside           defided         Colline         Colline         deside         deside           defided         Colline         Colline         deside         deside	Name			classification	Region	10 Aug								
archives         (100)         C_20007         (210)         etc.         (210)         etc.         (210)	Aaron Brevet	170009	AC,LOOVE	KC425R	Aborta	4:514								
Annohada         Bitter         Turk         All         All         Andre           Adurth Ma         Bitter         Andres-Turk         All         Andres         Andres           Adurth Ma         Bitter         Andres-Turk         Andres         Andres         Andres           Adurth Ma         Bitter         Andres         Andres         Andres         Andres         Andres           Adurth Ma         Bitter         Andres         Andres         Andres         Andres         Andres														
Alled Tries         MEDI         Tapetters-Jon, 19-20         Aller         Addition           Add Annie Addit         TPUIZZ         Att_shares         Att_shares         Attice           Add Annie Addit         TPUIZZ         Att_shares         Attice         Attice           Add Annie Addit         TPUIZZ         Attice         Attice         Attice														
lala hada hada 119412 Alt, Jahawa Ka														
Abdi Russin 2007 Poelfinir-Jo., PF-JH Aberta Active +														
		30927	Ppetrar - 30	17-31	AD018	4(5)-6								

NOTE When entering time sheets into Billings, it is time effective for you to use the **Tab** key to move from column to column. When using the Tab key at the end of the last row, Billings automatically creates a new row and jumps to the first column in the new row, copying values from the last selected row.

To view the Timesheets tab and all time sheets that have been created, go to the menu list and expand the Timesheets option, then select **Timesheets**.

# 1.15.4 COPYING AN EXISTING TIMESHEET

You can copy an existing time sheet by following these steps:

### COPY EXISTING TIMESHEETS

### 1. Go to Timesheets > **Timesheets**.



2. Select the time sheet to be copied by clicking it once. If the timesheet you are looking for is not in the list, type in the time sheet number in the Timesheet # field to search for it. If you still cannot find the timesheet in the initial list, you may need to click the "Refresh" button on the ribbon bar to retrieve more matching timesheets from the database.

HO																		0
+		С	+		B	Copy	🛠 Cut	Print	Ì	۲								$\times$
New	v Delete Row(s)		Generate Vie Line Items	iew Locks	Create Template	Paste Special	⇔ Undo	Print Preview	Send To	View: All							Layout C	lose
		A	ctions			Edit		Print	Save	Filter							Window	N
Tim	esheets ©	0																
Drag	-	ader here to	group by that o	column	Тур	e		Timesheet ID	Job #	=	Root Project	Name	Region	Company	Work Date	Days	Status	
Drag	a column hea Timesheet #	ader here to	group by that o	column	Тур	e		Timesheet ID	Job :	\$	Root Project	Name «D:	Region	Company •©c	Work Date	Days =	Status ≠ Closed	
Xrag	a column hea Timesheet #	ader here to	group by that o	column	=	e gle Day Timesheet				\$								
Drag	a column hea Timesheet #	ader here to	group by that o	column	= Sing			* <b>D</b> ¢		£	10:	4 <b>0</b> ¢	4 <b>0</b> ¢	<b>(D</b> )	-		≠ Closed	
Drag	a column hea Timesheet # #@r 0000019390	ader here to	group by that c	column	= Sing	gle Day Timesheet		AD: 0000019390		2	DEMO	KIEWIT DEMO(DEMO)	*©c Alberta	Mining Company	= Jan-17-2023		✓ Closed <ol> <li>Open</li> </ol>	



### 3. Click **Copy** from the ribbon bar.

#### 4. Click Special Paste

NOTE Ensure Special Paste is selected and not Paste as Special Paste lets you control how the copy process is performed.

		www.unlocked.copy.only)
-		credit timesheet only)
Adj	ustment (mak	C&redit (makes a credit timesheet only)
Enter times	sheet details:	
C	redit T/S #:	
New copy o	f Timesheet:	
т/	S #:	Copy of 0000019389
т/	S Date:	Jan-15-2023 👻
C	opy the follow	ving values from the original:
	✓ Hours an	nd Quantities
	✓ Line Item	IS
	✓ Timeshee	at Notes
	GPS Loca	tion
т	o remove from	m the newly created copy:
	Inactive	Employees
	Inactive	Equipments
	Inactive	Materials
Pressing O	K will copy the	e timesheet and:
Retu	rn you to the	timesheet list Open the new timesheet

5. In section 1, choose the type of copy you want to make.

6. Section 2 automatically names the time sheet as "Copy of", plus the original timesheet number. Change this to the new time sheet number if needed. Select the work date for the new timesheet. This section also contains the options of having the hours, quantities, line items, and time sheet notes pull in from the original timesheet it was copied from.

7. In section 3, select Open the new time sheet.

8. Click **OK**. The new time sheet opens. You can modify the time sheet as required with any information that needs to be changed.

## 1.15.5 IMPORTING A TIMESHEET

Billings lets you import multi-project or multi-day time sheets from a spreadsheet if the correct template is used.

### IMPORT A TIME SHEET

1. Processes > Imports > Timesheet Import.



The time sheet Import window opens.

Image: Section
Actions       Actions       Colspan="2">Colspan="2"Colspan
Actions     Operation       Selections you to import affer on other applications into DTC.       Created       Created     Description       Created     Description       Created     Operation       V11/2023     Tmechnet Import LB% 19984       V11/2023     Tmechnet Import LB% 19935
Using imports allows you to import a file from other applications into DTC-         Status           as a cutum header here to group by that cutum         Description         Create By         Status           created
Image and um header here to group by that column         Description         Created         Storage         Status           r         dpc
Image soutum header here to group by that column         Description         Created         Description         Create By         Status           =         40c
a solum header here to group by that column         Description         Created         Oracle By         Status           =         40c
Orated         Decorption         Create By         Stats           =         dpc         dpc         dpc           1/1/2023         Tendent Import 159: 19384         Robert Ooka         Completed           1/1/2023         Tendent Import 159: 19375         Robert Ooka         Completed           1/1/2023         Tendent Import 159: 19375         Crystal Cerstal         Completed
VI11/2023         Timesheet Import LD4: 15/264         Robert Odia         Completed           VI11/2023         Timesheet Import LD4: 15/353         Robert Odia         Completed           VI/4/2023         Timesheet Import LD4: 15/975         Crystal Gerstel         Completed
J111/2023         Timesheet Import LBM: 19383         Robert Oska         Completed           1/4/2023         Timesheet Import LBM: 19375         Crystal Gerstel         Completed
1/4/2023 Timesheet ImportLBM: 19375 Crystal Gerstel Completed
(a filme)   numper refer

2. Click the **Create Import** button. The Import Definition dialog box opens, and you can specify the file containing the timesheet data that you want to import. Billings previews the file contents in the time sheet Header, Personnel, and Line Items tabs.

J Import Definition		×
Name: Timesheet Import		
Enter Criteria:		
Import Timesheet Source Excel File: C:\Users\Crystal.Gerstel\Desktop	Time	
Submit OK Cancel	Apply	

3. You can edit the data in the import window in Billings to correct any errors that are reported. After you have corrected the errors, click **OK** to revalidate the data. This lets you correct errors in the import file without having to edit the file itself.

# 1.16 LEMS

## 1.16.1 CREATING A LEM

The standard Billings LEM process is called LEMs, which stands for labor, equipment and material reports. When selecting a project via the Project tab and managing the criteria, the criteria screen has two tabs, General and Project. Both need to be populated.

### CREATE A LEM

#### 1. Go to LEMs > LEMs.



The LEMs tab opens, listing all results previously generated LEMs.

Delete Refresh & Print Preview Row(6) Actions Print			Layou V
0			
j	a as a file. This file can then be imported into other applications to remove the need to double	enter data and reduce entry errors	
a column header here to group by that column	Description	Created By	Status
		AD:	=
2023-01-12 15:56:56	LEM # 190010-K104 - 0001 (84425)	-	Completed
2023-01-12 15:56:56	LEM # 190010-K104 - 0001 (84425) LEM # 190010-K103 - 0003 (84400)	Kennedy Roulston Crystal Gerstel	Approved
2022-01-04 20:45:55	LEM # DEMO - 0001 (84386)	Kennedy Roulston	Pending Approval
2022-11-30 20:16:41	LEM # 190010-K103 - 0001 (84386)	Kennedy Roulston	Pending Approval Pending Approval
2022-09-09 09:46:32	LEM # 190010-(103-0001 (84366)	Crystal Gerstel	Pending Approval Pending Approval
2022-09-09 09:46:32	LEM # 190013 - 0001 (84366)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 190013 - 0002 (0-500) LEM # 180011 - 0005 (84366)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 180011 - 0005 (0/300)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 180011 - 0006 (84366)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 180011 - 0007 (84366)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 180011 - 0002 (01300)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 180011 - 0004 (84366)	Crystal Gerstel	Pending Approval
2022-09-09 09:46:32	LEM # 180011 0001 (84366)	Crystal Gerstel	Pending Approval
2022-05-18 15:06:07	LEM # DEMO - DEMO MU ADJ (23700)	Crystal Gerstel	Pending Approval
2022-05-18 14:55:54	LEM # DEMO - DEMO4 (23695)	Crystal Gerstel	Pending Approval
2022-05-18 12:04:17	LEM # DEMO - DEMO5 (23687)	Crystal Gerstel	Pending Approval
2022-05-18 12:01:17	LEM # DEMO - DEMO3 (23683)	Crystal Gerstel	Pending Approval
2022-05-18 11:50:53	LEM # DEMO - DEMO2 (23680)	Crystal Gerstel	Approved
2022-05-18 10:54:12	LEM # DEMO - DEMO1 (23673)	Crystal Gerstel	Pending Approval

2. To review the contents of a particular LEM , or for LEMs that require approvals, select the applicable result, and then double-click to open the LEM in its own LEMs Detail tab.

NOTE Depending on the process type, the Notes section can contain information regarding the outcome of the process. The contents of the resulting Details page varies by each process type.

3. If the LEM has not yet been approved, you can review the detailed results and remove any lines that should not be approved. After reviewing results, you can then approve the LEM, which in turn locks the underlying data from future edits.

_																	Notes:																		
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reate	d:	5/18/20	2 2:55 P	м				Status		Pend	ng Appro	wal				Ŧ		a: From: Ma	-01-2025																
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odifie	d:	5/18/20	22 2:56 P	м				Date /	Accepted:							*		ride LEM N ct: KIEWI																	
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r.	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27082	2672	00	EAL	1.000	10.0	15.8	158	174		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27082	2672	00	EAL	1.000	10.0	8.241	82.4	90.6		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27082	2672	00	EAL	1.000	10.0	28.7	287	316		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27082	2672	00	FT	2.000	10.0	17.6	88.0	193		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27082	2672	00	FT	0.100	10.0	0.880	88.0	9.680		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Allia	Mate									6374	27409	2672	00	EAL	1.000	10.0	10.5	105	116		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Allia	Mate									6374	27409	2672	00	EAL	1.000	10.0	3.156	31.5	34.7		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Allia	Mate									6374	27409	2672	00	EAL	1.000	10.0	1.920	19.2	21.1		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		wily'	Tran									1804	27617	2672	00	LS	1.000	0.000	0.000	75.3	75.3		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27381	2672	00	EAL	1.000	10.0	9.425	94.2	103		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27322	2672	00	EAL	1.000	10.0	2.500	25.0	27.5		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		DNO	Cons									9136	27382	2672	00	EAL	1.000	6.000	0.670	11.1	11.8		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		DNO	Mate									9136	27415	2672	00	EAL	1.000	10.0	13.4	134	147		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		DNO	Mate									9136	27415	2672	00	EAL	1.000	10.0	13.4	134	147		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Allia	Mate									6374	27409	2672	00	EAL	1.000	10.0	12.3	123	135		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Russ	Mate									6034	27221	2672	00	FT	20.0	10.0	11.0	5.500	121		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360	27364	2672	00	EAL	1.000	10.0	3.757	37.5	41.3		3rd Part
	18338	DEMO	KIE					05/0	DEM	18338	3RD	LineI		Ape	Mate									360+	27364	2672	00	EAL	1.000	10.0	1.996	19.9	21.9		3rd Part
																													68.1	354	305	2,88	3,50		
eco	rd 1 of	38 <																																	

4.You can create a layout for the LEMs Detail page by selecting the Layout drop-down list on the right side of the ribbon bar.

5. Depending on the process, you can send the process results to a report or send the data to a file using the export-specific buttons at the bottom of the page. See the Report Export Options topic for more details on viewing the export details as a report.

0	LayoutCloseSaveSave AsSystem DefaultSet DefaultRemove DefaultRemove Default	
	Share	
InEight Billings	>	<
Save Layout As	OK Cancel	

6. After you have reviewed or approved the export, click **OK** or **Apply** to save your changes and exit the page. If you want to cancel your changes, click **Cancel**.

7. To initiate a new instance of a LEM, select the **Create Process** icon located on the ribbon bar.

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ude Material:	1	
ude Line Item:	✓	✓
ude Non-Billable Item:	:m:	
t into LEMs by WBS Level:	Level:	
t into LEMs by Work Date:		
t into LEMs by Work Order:	CDate: 🗸	$\checkmark$
	Order:	✓
t into LEMs by Timesheet: ore Timesheet Approval:	c Order:	✓

8 The LEMs Criteria screen opens with the General tab selected. This tab lets you set the LEM parameters that control the scope of the data that will be processed by the LEM process.

9. Use the Project tab to specify a specific job, or specify individually selected WBS items for a single job to limit the scope of the data processed by using the Limit Scope To section of the screen.

10. Click the **Submit** icon located on the ribbon bar when you are done setting the parameters and want to initiate the LEM process.

HOME			
Submit	Copy X Cut		>
Submit	© Paste Special ℃ Undo	Criteria	ck
Actions	Edit	Save	Win

To check on the progress of your request, go to the Process Status page (Processes > Process Status).

To see your new request listed on the LEMs tab, click the Refresh icon located on the ribbon menu.

# **1.17 INVOICES**

## 1.17.1 CREATING AN INVOICE

An invoice records the transaction between a buyer and seller, and establishes the terms of payment.

### **CREATE AN INVOICE**

#### 1. Go to Invoices > **Invoices**.

The Invoices tab opens with a list of all previously generated invoices.

HOME					<b>-</b>
	Print				
Create Delete Refresh Process Row(s)	Print Preview				Layout Close
Actions	Print				Window
Invoices O					· · ·
Drag a column header here Created	to group by that colu	m Description	Created By	Status	٩
T 10:		* <b>D</b> ¢	* <b>0</b> ¢	-	
→ 2022-05-18 15:21:55		DEMO - DEMO 1 (23703)	Crystal Gerstel	Pending App	proval

2. To review the results of a particular invoice process, or for invoices that require approvals, select the applicable result, and then double-click to open the invoice process in its own Invoices Details tab.

→ J	value. Mari cannot be u											Note	5:													
scription:	DEMO - DEP	401 (23703)										Crite	ria:													
ated:	5/18/2022	3:21 PM			Stat	tus:	Pending	Approval			-		rride Invoid e From: Mar	te Num: DEM	01											
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T/S ID	Project	Project	Project	Project	Project	WBS L 1	T/S Job	Resour	Resour	Resour	Туре	Resour	Line Ite	Custom	Bill As C	Bill As N	Cost As	Cost As	WBS Pa	UOM	Qty	Markup	Markup	Bill Rate	Bill Amo	Generated L
183	4 DEMO	KIEWIT					PROGR	Labour	150597	Ewing,	Subcon	DSP Co		Welder	KC-WD	.KC_W	KC-WD	Welder	2672\2	ST	8.000			54.990	439.920	
183	4 DEMO	KIEWIT					PROGR	Labour	119926	Cooper	Subcon	DSP Co		Labour	KC-LBJR	.KC_La	KC-LBEL	Labour	2672\2	OT	5.000			45.070	225.350	
183	5 DEMO	KIEWIT					PROGR	Labour	111295	Hedin,	Subcon	DSP Co		Carpen	KC-CP1	.KC_Ca	KC-CP1	Carpen	2672\2	ST	10.000			33.430	334.300	
183	3 DEMO	KIEWIT					PROGR	Labour	180681	Gerace	Subcon	DSP Co		Welder	KC-WD	.KC_W	KC-WDBP	Welder	2672\2	DT	10.000			120.000	1,200	
183	5 DEMO	KIEWIT					PROGR	Labour	69590	Callend	Subcon	DSP Co		Carpen	KC-CP3	.KC_Ca	KC-CP3	Carpen	2672\2	DT	2.000			88.000	176.000	
183	5 DEMO	KIEWIT					PROGR	Labour	69590	Callend	Subcon	DSP Co		Carpen	KC-CP3	.KC_Ca	KC-CP3	Carpen	2672\2	от	2.000			59.730	119.460	
183	4 DEMO	KIEWIT					PROGR	Labour	106145	Stefluk	Employee	Kiewit		Labour	KC-LBSR	.KC_La	KC-LBSR	Labour	2672\2	ST	10.000			54.210	542.100	
183	5 DEMO	KIEWIT					PROGR	Labour	135545	Vienne	Subcon	DSP Co		Carpen	KC-CP1	.KC_Ca	KC-CP1	Carpen	2672\2	ST	5.000			33.430	167.150	
183	5 DEMO	KIEWIT					PROGR	Labour	129630	Lakhan	Subcon	DSP Co		Carpen	KC-CP4	.KC_Ca	KC-CP4	Carpen	2672\2	ST	10.000			49.600	496.000	
183	5 DEMO	KIEWIT					PROGR	Labour	117891	Middlet	Subcon	DSP Co		Carpen	KC-CP2	.KC_Ca	KC-CP2	Carpen	2672\2	OT	2.000			52.400	104.800	
183	4 DEMO	KIEWIT					PROGR	Labour	50320	Holm,M	Subcon	DSP Co		Superin	KC-SUP	.KC_Su	KC-SUP	General	2672\2	от	10.000			125.670	1,256	
183	4 DEMO	KIEWIT					PROGR	Labour	150597	Ewing,	Subcon	DSP Co		Welder	KC-WD	.KC_W	KC-WD	Welder	2672\2	от	2.000			74.390	148.780	
183	5 DEMO	KIEWIT					PROGR	Labour	135545	Vienne	Subcon	DSP Co		Carpen	KC-CP1	.KC_Ca	KC-CP1	Carpen	2672\2	ST	5.000			33.430	167.150	
183	5 DEMO	KIEWIT					PROGR	Labour	69590	Callend	Subcon	DSP Co		Carpen	KC-CP3	.KC_Ca	KC-CP3	Carpen	2672\2	ST	8.000			44.210	353.680	
183	5 DEMO	KIEWIT					PROGR	Labour	117891	Middlet	Subcon	DSP Co		Carpen	KC-CP2	.KC_Ca	KC-CP2	Carpen	2672\2	ST	10.000			38.820	388.200	
183	4 DEMO	KIEWIT					PROGR	Labour	119926	Cooper	Subcon	DSP Co		Labour	KC-LBJR	.KC_La	KC-LBEL	Labour	2672\2	ST	5.000			33.430	167.150	
183	5 DEMO	KIEWIT					PROGR	Equipm	55429	Welder	Owned	Kiewit		Weldin	KC-WD	.KC_W	KC-WD	Welder	2672\2	HR	10.000			15.000	150.000	
183	5 DEMO	KIEWIT					PROGR	Equipm	55721	Welder	Owned	Kiewit		Weldin	KC-WD	.KC_W	KC-WD	Welder	2672\2	HR	10.000			13.000	130.000	
183	0 DEMO	KIEWIT					EQP AD	Equipm	54887	Welder	Owned	Kiewit		Weldin	KC-WD	.KC_W	KC-WD	Welder	2672\2	HR	-10.000			15.000	-150.000	
	18 <																				183.000	10.000	4.000	31,803	42,834	

3. If the invoice has not been approved, you can review the results on the page and remove any lines that should not be approved. After the results have been reviewed, you can then approve the invoice,

which in turn locks the underlying data from future edits. After you have reviewed or approved the export, click **OK** or **Apply** to save your changes and exit the page. If you want to cancel your changes, click **Cancel**.

### CREATE A NEW INVOICE

1. To initiate a request to generate one or more invoices, click the Create Process icon located on the ribbon menu



The Invoices Criteria tab opens with the General tab selected. This tab lets you set the invoice parameters that control the scope of data that will be processed by the invoice process.

nvoices In	oices Criteria 🔘	
General * Proje	t Process	
	Enter Filter Criteria:	
verride Invoice Num		
ate From:	Jan-31-2023	
ate To:	Jan-31-2023	
nvoice Date:	Jan-31-2023	
plit into LEMs by WB	Level:	1
ndude Non-Billable I	en:	
ndude Personnel:		
ndude Equipment:		
ndude Material:		
ndude Line Item:		

2. Use the Project tab to limit the process scope to one or more jobs; if only one job selected, you can use the Limit Scope To section to further the generation of the invoice(s) to specific WBS or Pay Items

3. Use the Process tab to limit scope of the invoice generation to only specific LEMs (for example, only Approved but un-invoiced LEMs to be included)

4. Click the Submit icon located on the ribbon menu when you are done setting the parameters and want to initiate the invoice process.

5. To check on the progress of your request, use the Process Status page (Processes > Process Status).

To view your new request on the Invoices tab, click the Refresh icon located on the ribbon menu.

# **1.18 MANAGING MASS CHANGES**

# 1.18.1 RETRO RATE ADJUSTMENT

Billings lets you reverse locked timesheets to process various adjustments, such as retroactive rate changes. The adjustment process generates locked credit time sheets that back out the previously locked time sheet information and create new timesheets with refreshed rates. The new timesheets let you to perform further edits before using the newly generated timesheets for LEMs, invoices or other system processes (exports).

### START A RETRO RATE ADJUSTMENT

1. Select Processes > Adjustments > Retro Rate Adjustment or Actuals Task Transfer Adjustment.

Timesheets ^	
(📇 Timesheets	
Templates	
EMs Ý	
Invoices ~	
Processes ^	
Adjustments	
Actuals Task Transfer Adjustment	
Retro Rate Adjustment	
· Timports	

The appropriate Adjustment tab appears for the adjustment process selected.

Creat	ted	Description		
r 🚛 🕬			Created By	Status
		10¢	4 <b>0</b> 0	-
	-01-04 21:00:29	Retro Rate_TEST WORK ORDER (84410)	Crystal Gerstel	Completed
	I-01-03 14:32:01	Retro Rate (84387)	Kennedy Roulston	Completed
	-09-22 11:04:23	Retro Rate (84378)	administrator	Completed
	-09-22 11:01:53	Retro Rate (84377)	administrator	Completed
	-09-22 10:08:05 -09-22 10:07:05	Retro Rate (84376)	administrator administrator	Completed
	-09-22 10:07:05	Retro Rate (84375) Retro Rate (84374)	administrator	Completed Completed
	-09-22 10:05:55	Retro Rate (84374) Retro Rate (84373)	administrator	Completed
	-09-22 10:03:20	Retro Rate (84372)	administrator	Completed
	-09-22 08:54:16	Retro Rate (84369)	administrator	Completed
	-09-22 08:52:45	Retro Rate (84368)	administrator	Completed
	-09-22 08:49:02	Retro Rate (84367)	administrator	Completed
	-05-18 15:04:40	Retro Rate DEMO MU ADJ (23699)	Crystal Gerstel	Completed
	-05-18 12:14:53	Retro Rate DEMO (23690)	Crystal Gerstel	Completed
2021	-12-09 12:15:46	Retro Rate (23652)	Crystal Gerstel	Completed
2020	-03-07 07:59:47	Retro Rate (15091)	Crystal Gerstel	Completed
2020.	-02-11 08:07:54	Retro Rate (14229)	Crystal Gerstel	Completed

### 2. Select the Create Adjustment icon.

HOME	
$\exists \Box \subset$	$\blacksquare$ $\times$
Create Delete Refresh Adjustment Row(s)	Layout Close
Actions	Window

The adjustment selection criteria dialog box opens. This dialog lets you set the filtering and adjustment specific parameters which will control the scope of the data selected for adjustment and any output formatting of data by the adjustment process. The filtering parameters and control parameters are unique to each adjustment process type.

		P	a		
	reated	Description	Created By	Status	
r i		·D:	۰D:	=	
- Janes	023-01-04 21:00:29	Retro Rate_TEST WORK ORDER (84410)	Crystal Gerstel	Completed	
	023-01-03 14:32:01	Retro Rate (84387)	Kennedy Roulston	Completed	
	022-09-22 11:04:23	Retro Rate (84378)	administrator	Completed	
	022-09-22 11:01:53	Retro Rate (84377)	administrator	Completed	
	022-09-22 10:08:05	Retro Rate (84376)	administrator	Completed	
	022-09-22 10:07:05	Retro Rate (84375)	administrator	Completed	
	022-09-22 10:05:35	Retro Rate (84374)	administrator	Completed	
	022-09-22 10:04:05	Retro Rate (84373)	administrator	Completed	
	022-09-22 10:03:20	Retro Rate (84372)	administrator	Completed	
	022-09-22 08:54:16	Retro Rate (84369)	administrator	Completed	
	022-09-22 08:52:45	Retro Rate (84368)	administrator	Completed	
	022-09-22 08:49:02	Retro Rate (84367)	administrator	Completed	
	022-05-18 15:04:40	Retro Rate DEMO MU ADJ (23699)	Crystal Gerstel	Completed	
	022-05-18 12:14:53	Retro Rate DEMO (23690)	Crystal Gerstel	Completed	
	021-12-09 12:15:46	Retro Rate (23652)	Crystal Gerstel	Completed	
	020-03-07 07:59:47	Retro Rate (15091)	Crystal Gerstel	Completed	
20	020-02-11 08:07:54	Retro Rate (14229)	Crystal Gerstel	Completed	

3. Click the **Submit** icon located on the ribbon bar when you are done setting the parameters to initiate the adjustment. A dialog box opens indicating the process was submitted.

InEight Billings >	<
Process has been submitted. Please use the Refresh button to check the result after the process done.	
ОК	

4. To check on the progress of your request, use the Process Status screen (Processes - Process Status).

To see your new request on the Retro Rate Adjustment tab, click the Refresh icon located on the ribbon bar.

# 1.18.2 GENERATE TIMESHEET LINE ITEMS WIZARD

It might be necessary to generate multiple time sheet line items based on a set of project rules. The Timesheet Line-Item Generator lets you create a time sheet with line items that are based on results of calculations based on entered set of criteria.

### GENERATE TIME SHEET LINE ITEMS

1. From the Timesheets page, click the **Generate Line Items** icon on the ribbon bar. The Generate Line Items wizard opens.



### 2. Click **Next** to continue.

Timesheets	Generate Tir	mesheet line Items 0
		Generate Timesheet Line Items
		This wizard will allow you to set parameters to generate a timesheet which will contain calculated line items based these parameters.
		Note: Day rate units are not included in the incentives calculations.
		To continue, dick Next
		< Back Next > Cancel

3. Select the type of calculation logic you need to use for the line item generation and click **Next**. Select one of the following options.

ïmesheets	Generate Timesheet Line Items 0			-
Line Item Para	meters type of calculation to use			
specity the	t per tri decuastori to con			
The lin of rule	e items are generated based on a set of calculation rules. You must specify which set syou with to use to generate these line items:			
	set amount per hour worked			
	Set amount per hour worked by type of time (ST, OT, DT, OTH, TT, LOA)			
	Set daily amount if hours worked for that day exceed set threshold			
	Set daily or weekly amount based on daily and weekly minimum hours rules			
		< Back Ne	xt > 0	Cancel

• Set the amount per hour worked – Calculates amount by multiplying total labor hours within a specified time by a preset hourly amount.

e <b>Item Parameters</b> Specify calculation details			
e Dollar Per Hour calculation type will apply the rate specified below to each and ew ran individual during the specified data range and for the specified project(s).	ry hour worked		
ease specify the amount of line item to be generated per each hour worked:	\$/hr		
Include Travel Time (TT) in calculation			
Include Living Out Allowance (LOA) in calculation			
			<back next=""> Can</back>

• Set amount per hour worked by type of time – Calculates the amount by multiplying various Labor hour totals grouped by unit of measure by a preset hourly amount set per type of time. Type of time refers to the Labor unit of measure (i.e., ST, OT, DT, etc.).

	Timesheets Generate Timesheet Line Items ()		*
Please specify the line item amount to be generated per each hour worked: Leave a rate blank or set it to 0 to exclude that type of hours from the line item calculation.			
	The Dollar Per Hour Type calculation type will apply the rates specified below to by the type by an individual during the specified data range and for the specifi Please specify the line item amount to be generated per each hour worked:	\$/hr of ST 5.fhr of OT 5.fhr of DT 5.fhr of DTH 5.fhr of TT	
< Back Next > Cancel			

• Set the daily amount if hours worked for that day exceed set threshold – Calculates a daily amount if the total Labor hours for that day meet or exceed a preset threshold.

esheets Generate Timesheet Line Items 0	
e Item Parameters Specify calculation details	
he Daily Threshold calculation type will generate a line item for the amount specified below for each day that an dividual has met or exceeded the threshold number of work hours.	
Daily line item amount: \$	
Daily threshold hours: h	
Indude Travel Time (TT) in threshold calculation	
Include Living Out Allowance (LOA) in threshold calculation	
	(
	< Back Next > Cance

4. Set daily or weekly amount based on daily and weekly minimum hours rules – calculates amounts based on day of week threshold hours rules. If Labor hours meet or exceed all daily thresholds then the weekly amount applies, otherwise daily amounts are calculated for all days that meet or exceed the daily thresholds. For days that do not meet the daily threshold, hourly amount applies.

NOTE For this calculation type, the date range is specified with a starting date and an indicator as to how many full weeks of data to use as source for the calculations.

Timesheets Generate Timesheet Line Items O		~
Line Item Parameters		
Specify calculation details		
The Daily/Weekly line item allows you to specify daily, weekly, and I	v thresholds and the line item amounts.	
By default, if an individual has worked the required number of hours	each specified day of the week, then	
the weekly line item amount will apply, otherwise daily line item amo work hours meet or exceed the daily thresholds. If daily threshold	will be generated for the basis that the the third that the basis of t	
	ild rule (*) Monday h	
Daily line item amount: \$ Use zero (0) thr	h h	
Hourly line item amount: \$	Wednesday h	
Include Travel Time (TT) in threshold calculation	Thursday h	
Include Living Out Allowance (LOA) in threshold calculation	Priday h	
(*) Zero (0) threshold rule: This rule creates and/or counts as eligibile days/hours where	Saturday h	
threshold has been zet to zero (0), but hours have been work	an Sunday h	
that day.		
	<back next=""> CA</back>	ancel

5. Click **Next** to begin specifying the time sheet criteria to base the calculations on. The criteria include project(s), time sheet and time sheet Approval Status, and time sheet Work Date range. After you have specified the filters click **Next**.

Item Para	
Specify so	ource data for calculation
Projects -	
	elect the project or projects for which the line items should be generated.
	KAI Projects>
	*SAMPLE BUDGET PROJECT (190013) - 15-30 Separation Facility - Field Construction(190013)
	*SAMPLE PROJECT (180002) - Pipestone Liquids Hub, Facility Construction(180002)
	*SAMPLE PROJECT (190010) - AWTF Electrical Construction(190010-K104)
	*SAMPLE PROJECT (190010) - AWTF Pipeline(190010-K110)
	*SAMPLE RETRO-RATE ADJ PROJECT(18000-9)
	*SAMPLE TASK TRANSFER PROJECT (190012) - 15-30 Separation Facility Fabrication & Assembly(190012)
	*SAMPLE WO PROJECT (190010) - AWTF General Construction(190010-K103)
	[I/TERNAL] Estimating - 2020(20000)
	BL Project Name(BL Project Code)
	Import Root Project(IMPRC2)
	Import Root Project(IMPRC2_CSV)
	Kennedy QA Test(Kennedy QA Test)
	KIEWIT DEMO(DEMO)
	QA test 2(QA test 2)
	QA test(QA test)
	SAMPLE PROJECT - 14-30-071-08 W6M Compressor Plant(180011)
	SAMPLE PROJECT - E-406 Stainless Valve Replacement(200005)
	SAMPLE PROJECT - Fabrication & Assembly(180015)
	SAMPLE PROJECT - Field Pipe Fabrication(200006)
	SAMPLE PROJECT - Shop Fabricated Pipe & Fittings(190008)
	SAMPLE PROJECT - Stainless Steel Spools(200002)
	SAMPLE PROJECT - Tower Stabilizer Feed Bottom Exchanger (200001)
	TEMP(TEMP)
Timesheets	S
Indude ti	timesheets that are: 🗸 All Timesheets, or: 🗌 Approved 🔹 Locked 🔹 Pending
Work dat	te ranne- Jan-30-2023 v to Jan-31-2023 v
	< Back Next> Can

6. Select personnel filters, if any, and click Next.

**NOTE** Only projects with assigned personnel will let you filter by person.

	Il Personnel", or specify individuals for whom the any of the selected projects do not require pre-		
		assignment of personnel, all personnel for	
	Name	Code	
	<all personnel=""></all>	<all personnel=""></all>	
V		<all personnel=""> 176689</all>	
	Aaron Brewster, Aaron Aaron Frick, Aaron	103391	
	Aaron Pearson, Aaron	135800	
	Aasen, Michael	30998	
	Ababio, Elvis	31038	
	Abasolo, Jeger	2875	
	Abbott, Sara	3584	
	Abdalla, Ahmed	3644	
	Abdi, Hussein	2837	
	Abdi, Abdukadir	2876	
	Abdi, Hussein	30937	
	Abdi, Mohamed (Moe)	3385	
	Abdi, Abdalla	3384	
	Abdi, Mahat	3649	
	Abdi, Sharmale	3653	
	Abdi Hirole, Abdi	174112	
	Abdi Kulmie, Abdi	132864	
	Abdiaziz Nur, Abdiaziz	111629	
	Abdihakin Mahamad, Abdihakin	152469	
	Abdijabar Khalif, Abdijabar	174472	
	Abdirahman Hilowle, Abdirahman	181403	
	Abdirashid Ibrahim, Abdirashid	129617	

7. The generated line items will attach to a newly created time sheet. In this step, provide details about the time sheet header as well as the generated time sheet Line Items, and click **Next**.

NOTE The Roll up calculated values to a single line-item option lets you summarize all generated line items to a single line item on the generated time sheet. This is a single line item that will not be associated with any personnel records.

m Parameters edfy generated time	unest details	
ne items will be gene heet below.	rated on a new timesheet. Please supply values for the various details of the generated	
enerated Timesheet		
T/S Date:	Jan-31-2023 *	
T/S Type:	Single Day Timesheet *	
Project		
enerated Line Items		
Line Item Type:		
Cost Code:		
Line Description:		
	Roli up calculated values to single line item	

8. Review your criteria and click Next.

NOTE The criteria preview content will copy to the Notes field of the generated time sheet.

9. The final step of the wizard displays the calculation results. Clicking the Finish button will open the Timesheet page with the generated time sheet.

**NOTE** The generated time sheet is not actually created in the database, and you will need to click **Ok** or **Apply** on the time sheet page to save it to the Billings database.

## **1.18.3 VIEWING TIMESHEET LOCKS**

Timesheets can be locked by multiple processes in the system. The ability to understand which processes have locked a specific time sheet record is often helpful in troubleshooting a solution to fix a record that has been incorrectly captured. For example, if a time sheet record has been locked by a LEM process, but the LEM has not been issued to the client, then deleting the LEM process with that time sheet record on it lets you modify the record, as it becomes unlocked after the process has been deleted. However, if one or multiple processes have locked a record, and they cannot be deleted, then any adjustments must be handled through an adjusting process.

### VIEW TIME SHEET LOCKS

1. Go to Timesheets > Timesheet.

2. From the Timesheets tab, select the time sheets you want to view, and then select the **View Locks** icon located on the ribbon bar.

E		Cut	₿ Print								$\blacksquare$ $\times$
e\ •	ew Delete Refresh Generate View Locks Cre * Row(s) Line Items Temp	ate 🕤 Undo	Print Preview Se	end To View: All							Layout Close
	Actions	Edit	Print S	ave Filter							Window
	ag a column header here to group by that column	389									
	Timesheet #	Туре	Timesheet ID	Job #	Root Project	Name	Region	Company	Work Date	Days	Status
	a⊡c	-	1 <b>0</b> 0	a 🖸 c	a 🗖 c	10c	10c	1 <b>0</b> 0	-	-	≠ Closed
	0000019390	Single Day Timesheet	0000019390		DEMO	KIEWIT DEMO(DEMO)	Alberta	Mining Company	Jan-17-2023		1 Open
	0000019389	Single Day Timesheet	0000019389		Kennedy QA Test	Kennedy QA Test(Ken	Alberta	Techmation Electric & Cont	Jan-15-2023		1 Open
	Copy of 0000019386	Single Day Timesheet	0000019388		DEMO	KIEWIT DEMO(DEMO)	Alberta	Mining Company	Jan-14-2023		1 Open
	0000019386	Single Day Timesheet	0000019386		DEMO	KIEWIT DEMO(DEMO)	Alberta	Mining Company	Jan-13-2023		1 Open
			0000019385		BL Project Code	BL Project Name(BL Pr	Alberta	SemCAMS ULC	Jan-11-2023		1 Open
•		Single Day Timesheet Single Day Timesheet	0000019384		180002	*SAMPLE PROJECT (1	Alberta	Ovintiv Canada ULC	Jan-11-2023		1 Open

3. A new tab opens listing the selected timesheet with the following columns available for cross referencing:

- T/S ID
- T/S #
- T/S Start Date
- T/S Type
- Approval Status
- T/S Status
- Parked

4. From the T/S ID column, click the **plus** (+) icon to view the selected timesheet results. The T/S Items tab opens with a list of all timesheet records within the timesheet selected.

fresh	tte tte Special 🖕 Undo					Layout Clo
ions	Edit					Window
esheets	Timesheet - Single Day: 0000019389	Timesheet Cross Reference 🛛 🔘				
a column header	here to group by that column					
T/S ID	T/S #	▼ T/S Start Date	T/S Type	Approval Status	T/S Status	Parked
n 🗖 c	— 0000019385	1 <b>0</b> :	4 <b>0</b> 0	* <b>D</b> ¢	1 <b>0</b> :	* <b>0</b> ¢
+ 0000019385	5 0000019385	2023-01-11	Single Day Timesheet	Approved	Open	

5. Double-click the timesheet item you want to view to see which processes have locked or consumed that timesheet item.

Project:	BL Project Code (BL Project Name)						T/S ID:	0000019385		Orden	ed By:					
							170 101									
egion:	Alberta	+ Com	ipany:	SemCAMS ULC			T/S #:	0000019385		Locati	on Billed To:					
vision:	Field Construction	*					Job #:			Client	#:					
							Date:	Jan-11-2023 *		T/S T	otal:	\$816.30				
sonnel Eguipr	ment Material Line Items Deta	ails Diary Attach	ments													
	er here to group by that column															
Unit #	Personnel Name	Personnel Code	Bill As		Cost As	Shift	Cost Code			TO		DT	DTH	π	LOA	
BL201 - 3	<ul> <li>BLiam BLars</li> </ul>	BL-LRS	.KC_Carpe													
ord 1of 1									8.00	.01		.00	.00	.00	.00	

# 1.19 REPORTS

# 1.19.1 REPORT EXPORT OPTIONS

Click the **Send To** menu option located on the ribbon bar at the top of the page, and then select either Grid or Pivot Grid. Depending on which report is opened, the Excel option can only be used when the report has first been exported to a **grid** or **pivot grid**.

If Grid is selected, the report data is pushed to a spreadsheet-like grid that lets you group, filter and sort the data and create basic mathematical group functions like summing, counting, averaging, etc.

Grouping is done by dragging a column header to the grey box located at the top of the window. Sorting is done by clicking on a column header. The first click sorts the data in ascending order, and the second click reverses the order.

You can use the first row of the data to apply filters to the data shown within the grid. Alternatively, you can use the quick filter, by clicking on the small funnel icon located on the right hand side of every column. This will show you a selectable list of values to filter.

All other functions are accessed through the Customization menu by right clicking on a column to bring up the Customization dialog box.

As with all other Billings grids, you can create and save custom layouts for the grid and pivot grid reporting views. After a layout has been created with the relevant columns, you can save the layout by selecting Layout from the top, right side of the tool bar.

NOTE Filters and sort order is also saved with the layout.

If Pivot Grid is selected, there are five view options to select from and more than one of these options can be selected at the same time.

Show Column Totals
Show Grand Totals for Single Values
Show Row Totals

As with the Grid report, the data is displayed in a spreadsheet pivot- style, and it can be manipulated by dragging and dropping the columns around the page. You can customize the results by applying filters to headers, add or remove displayed columns using the customization pop-up menu, rename columns and saving layouts with these changes.

If Excel is selected, an Export to Microsoft Excel Document dialog box opens. Choose the destination the file should save to, and then click **Save**.

When the file is opened, you can edit or adjust the report as required through the Excel spreadsheet.

Click the **Close** button to exit any of these reports. This will return you to the Report List grid.

### 1.19.1.1 PRINT PREVIEW

Click the **Print Preview** icon located on the ribbon bar. If only one report is assigned to the process you are reviewing, the report will open by default. If there are multiple report options, a window will open listing all available reports. You can then double click on the desired report to open.



t Quick Options Header/Footer Soule Margins Orientation Size Print Preview 0	Find     Thumbhails     Bookmarks     Editrog     Part     Part       Navigation		Many Pages Zo	Q Q Q Q oom Out Zoom Zoom I Zoom	Page Background Export	cios
	Report Name	Group	Notes	Owner		
	Activity Report	Group	Notes	owner		
	Attendance - LEM Discrepandes					
	Attendance Grid Report					
	Attendance Roster					
	Blank TS					
	Classification Audit					
	Classification List					
	Commitment Summary					
	DTC - Copy of Activity Report					
	DTC - Copy of Job Summary					
	Daily CrewTimesheet					
	Daily LBM					
	Detailed Payroll Entry Report					
	Equipment Audit					
	Equipment List					
	Incurred Commitments					
	Invoice Report					
	Job Summary					
	Labour Equipment Material					
	Material List					
	Next Day Timesheet					
	Payroll Audit Report (Multi Unit Columns)					
	Payroll Audit Report (unit and quantity)					
	Payroll Entry Report Personnel Audit					
	Personnel List					
	in er a vinner bas			· · · · · ·		